

## SPECIFIC PROCUREMENT NOTICE – IT CONSULTING SERVICES

Funding source:	Asian Infrastructure Investment Bank (AIIB)
Sector:	Information Management
Project Name:	<b>Records and Information Management (RIM) Implementation Consultancy Service</b>
Project No.	<b>AIIB CP - 00034</b>
Deadline:	February 26, 2018

Date: February 1, 2018

The Asian Infrastructure Investment Bank (AIIB) now invites Expression of Interest (EOI) from qualified consulting firms, to provide Records and Information Management Consultancy and Implementation Service. A shortlist will be prepared following the pre-defined selection criteria for participating in the selection process. The selection will follow AIIB's draft Corporate Procurement Policy, relevant rules and procedures.

The letter of expression of interest (EOI) should provide information of the company's technical qualifications and experience in undertaking Records and Information Management related services in the past eight (8) years. Please provide the information requested in the Annex B.

Consulting firms should submit all related documents as required under Annex A and B to the following Client's Email address in PDF format, before 24:00 PM, February 26, 2018 (Beijing time).

Contact person's information:

Mr. Evan Shang,  
Corporate Procurement Division  
E-mail Address: [it.procurement@aiib.org](mailto:it.procurement@aiib.org)  
Facilities and Administration Services Department  
Asian Infrastructure Investment Bank  
B-9 Financial Street, Xicheng District  
100033 BEIJING, CHINA

Annex A – Simplified Terms of Reference

Annex B - EOI Form

## Annex A

### Simplified Terms of Reference

#### Records and Information Management (RIM) Implementation Consultancy Service

##### 1. Background

The Asian Infrastructure Investment Bank (AIIB) is a multilateral development bank with a mission to improve social and economic outcomes in Asia and beyond. Headquartered in Beijing, we commenced operations in January 2016 and have now grown to 80 approved members from around the world. By investing in sustainable infrastructure and other productive sectors today, we will better connect people, services and markets that over time will impact the lives of billions and build a better future.

AIIB offers sovereign and non-sovereign financing for sound and sustainable projects in energy and power, transportation and telecommunications, rural infrastructure and agriculture development, water supply and sanitation, environmental protection, and urban development and logistics.

The Records and Information Management Section sits within the Facilities and Administrative Services Division (FASD). Its main objective is to develop and deliver a broad range of records and information management (RIM) functions of the Asian Infrastructure Investment Bank (AIIB).

##### 2. Current IT Environment and Status of Records Management

The Microsoft Office 365 and SharePoint online are AIIB's existing platforms for information management. Currently, AIIB has about 70 SharePoint sites with information that can potentially become records.

AIIB has just approved the *Directive on Records and Information Management (RIM)* that sets the overall principles and a framework for the lifecycle management of records and information. The Bank will soon issue a detailed *RIM Administrative Guidance (AG)* for staff to ensure the efficient and accurate implementation of the Directive. One of the main principles of the AIIB's RIM program is that the Bank's Records shall be created primarily in electronic format, unless required in physical format for legal or functional reasons. Therefore, the RIM program is aimed at achieving a "less paper" office environment of records through the implementation of a modern robust electronic records management system, clearly defined guidelines, associated tools and providing appropriate training to staff.

AIIB is a new institution and has entered its third year of operation. AIIB's departments and units, currently hold documents mostly in electronic formats, but there are some paper-based documents stored in individual office spaces and records rooms. Currently SharePoint sites are generally used to file electronic documents by most of the departments. However, a considerable number of electronic documents are also being stored in local networks and hard drives of individual staff member's computers. Therefore, there is a clear need to deploy a RIM system to capture and properly maintain records in a centralized RIM Repository.

### **3. Scope of Work**

The RIM Section is looking for a consultancy service from a qualified firm/vendor to help select, develop and deploy an electronic records management system and implement associated RIM tools to effectively manage the information lifecycle of AIIB's records and information in accordance with the Bank issued Directive, guidelines and chosen standards.

### **4. Deliverables:**

Given the above scope, this Records Management Consulting Service shall deliver the following specific deliverables in three (3) broad phases.

- A. Preparatory work for the Records (RIM) System Implementation
- B. RIM System Deployment
- C. Maintenance of System

### **5. Proposal for a RIM System Solution for AIIB:**

The Technical Proposal for this consultancy should include a proposal for a best RIM solution for AIIB, based on the market scanning of currently available systems. While proposing a RIM system, the vendor/firm must take into consideration, among other criteria, the technical soundness of the proposed system, integration with corporate business systems, cost-effectiveness and current industry best-practices and trends in records and information management. The proposal shall also include, if any, add-on software solutions in conjunction with proposed RIM System. This is an opportunity for the vendor to demonstrate their understanding about RIM System, which will be ultimately used as part of the overall technical evaluation.

### **6. Qualification:**

The consulting firm undertaking the assignment should have a minimum of 8 (eight) years of direct experience in the implementation of electronic records management programs and services.

- It is expected that the consultant (s) of the company/firm have relevant advanced university degree, or equivalent professional work experience combined with a university degree in a related field. Certification(s) in information management, for example, but not limited to SharePoint, ICRM, AIIM etc. are highly desirable.
- Experience with implementing an electronic Records Management system. Demonstrated experience in electronic records management in a SharePoint environment is an asset.
- Experience ensuring usability and user-friendliness of records management instruments.
- Demonstrated experience in developing and implementing a classification scheme of all document types, record retention schedules and document metadata standard.
- Demonstrated experience in creating and evaluating records management system requirements.
- Ability to present highly complex arguments, information and ideas in an easy to understand and memorable fashion.

- Can work well and deliver effectively without close daily supervision once the clear deliverables are set.

### **7. Timetable:**

The total period for this consultancy is for six (8) months from the date of start of the consultancy. The expected start date of the consultancy is April 1, 2018.

## Annex B: EOI Form

[Expressions of interest are subject to a 10-page limit, including any attachments.]

### Expression of Interest (EOI) by Consulting Firm

Date: [dd/mm/yyyy]

Dear Mr./Ms. [copy the AIIB's representative's name, designation and department as indicated in the EOI],

We have read carefully your Invitation for Expression of Interest for the captioned assignment/project and find the Terms of References (TOR) match our firm's capacity for providing the services required in the TOR. We would like to express our interest for being considered for the Shortlist. We understand that AIIB does not have an obligation that we must be shortlisted.

Our firm's profile and information relevant to this EOI are in provided below:

#### I. Consulting Firm Profile

Firm's Name	
Country of Incorporation:	
Firm's Address: (Street name, City, State/Province, Country, ZIP code) Fax No.: Phone No.: Email: Website:	

#### II. Specific Qualifications and Experience

[Notes to consultant: Highlight the technical qualifications and experiences of your firm in undertaking tasks in any of the four areas of focus, as indicated in the EOI].

**III. Methodology od Work**

[Notes to consultant: Describe the methodology to provide relevant services. This is an opportunity for the firm to demonstrate its understanding about the scope of this work]

**IV. Proposal for a Records System**

[Notes to consultant: To demonstrate the firm’s knowledge about and experience in records management system implementation you must propose one solution for AIIB with providing ample justifications]

**V. Other Information**

[Notes to consultant: Provide other information that you consider to be useful for the AIIB in its consideration of your candidacy for the shortlist].

**V. Project References**

[Notes to consultant: Please select at least three of the most relevant projects to demonstrate the firm’s technical qualifications and experience.

Period	Client	Project	Country	Role of the Firm (As lead firm or partner?)	Contract value

**VI. Eligibility Declaration**

We, the undersigned, certify to the best of our knowledge and belief:

- We have read the advertisement, including the generic terms of reference (TOR), for this assignment.
- We confirm that the project references submitted as part of this EOI accurately reflect the experience of our firm.
- We confirm our firm and all the personnel indicated in the EOI have met the requirements of Corporate Procurement Policy of AIIB, which can be found on [http://www.aiib.org/html/aboutus/Institutional\\_Documents/Corporate\\_Procurement\\_Policy/?show=4](http://www.aiib.org/html/aboutus/Institutional_Documents/Corporate_Procurement_Policy/?show=4)

[Signature:

Name of the firm's authorized representative:

Position]