



REQUEST FOR PROPOSAL (RFP) Comprehensive Records Management

Issued by Sigma Gamma Rho Sorority, Inc.

1. OVERVIEW

Sigma Gamma Rho Sorority, Inc. (SGR) is seeking proposals from experienced records management vendors to provide a **comprehensive digital and physical document management solution**. This project aims to replace the current storage system with a solution that enhances searchability, real-time analytics, and streamlined access to both digital and physical records. The ideal solution will support organizational efficiency, enable quick search and retrieval, and maintain high standards of security and compliance (HIPAA, GDPR, SOC 2, ISO 27001).

2. OBJECTIVES

- Transition from the existing service provider to a more efficient and technologically advanced system that can meet the current and future organization's storage needs.
- Ensure seamless access to **both digital and physical documents** with enhanced searchability and indexing.
- Implement real-time analytics for quick decision-making and data retrieval.
- Achieve a fully compliant, secure, and scalable solution that supports regulatory obligations.
- Optimize organizational workflows for membership data, governance documents, and archived records.

3. SCOPE OF WORK

A. Digital and Physical Record Management

- Secure storage and structured categorization of both digital and physical documents.
- Advanced search functionality, including:
 - Metadata-based search
 - Full-text indexing
 - Custom tagging and categorization
 - Search by date, document type, content, and location metadata

- OCR (Optical Character Recognition) and AI-based search capabilities for scanned documents
- Ability to add new assets on demand



B. Real-Time Analytics & Reporting

- Real-time analysis of record access, modification, and retrieval.
- Dashboards for monitoring document activity, usage patterns, and compliance checks.
- Automated reporting on document lifecycle, including access frequency and archival status.

C. Automated Sorting & Indexing

- Automated data classification upon upload.
- Intelligent sorting based on predefined categories and metadata.
- Batch indexing capabilities for physical-to-digital conversions.
- Machine learning-based tagging for dynamic data categorization.
- Retention & Lifecycle Management (automated archiving, deletion policies)

D. System Integration

- Seamless integration with existing membership databases and CRM platforms.
- Support for API connections to other enterprise systems
- Capability to integrate with data visualization tools for reporting.
- Compatibility with cloud-based collaboration tools (Microsoft 365, SharePoint, Google Workspace, Dropbox).

E. Security & Compliance

- Role-based access control and user authentication.
- Data encryption at rest and in transit.
- Audit trails and reporting for compliance verification.
- **Disaster Recovery & Backup (redundant storage, recovery plans)**
- Automated compliance checks to ensure data integrity and regulatory adherence.

4. DELIVERABLES

- Comprehensive deployment and migration plan from the current system.
- Staff and volunteer training and detailed user documentation.

- Ongoing support and maintenance services.
- Integration roadmap for membership databases and CRM platform.

- Custom reporting templates and search configuration tools.
- Real-time analytics dashboard and data visualization components.
- 24/7 Support Availability
- Service-Level Agreements (SLAs) (uptime guarantees, response times)
- Dedicated Project Manager
- Ongoing Training Opportunities



5. EVALUATION CRITERIA

- **Security and Compliance:** Meets or exceeds industry standards (HIPAA, GDPR, SOC 2, ISO).
- **Searchability and Indexing:** Efficient and fast retrieval of records, including legacy documents.
- **Analytics and Reporting:** Real-time insights and customizable reporting capabilities.
- **Cost-effectiveness and Scalability:** Transparent pricing and ability to grow with the organization.
- **Vendor Reliability:** Proven track record with similar organizations and expertise in data management.
- **Migration Strategy:** A Detailed plan to seamlessly transition from the current provider.
- **Storage Tiers & Pricing Models**
- **Retention Policies and Lifecycle Management**
- **Hybrid (Digital and Physical) Storage Capabilities**

6. PROPOSAL REQUIREMENTS

1. **Company Profile** – Overview, experience, and team structure.
 2. **Proposed Solution** – Technical approach, security model, and software architecture.
 3. **Implementation Timeline** – Key milestones from initiation to final deployment.
 4. **Pricing Model** – Clear breakdown of costs (software, migration, training, support).
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5. **Client References** – At least three (3) references with similar projects.
 6. **Sample Implementation Plan** – Outline of how the migration from the existing system will be handled.
 7. **Legal Hold & eDiscovery Features**

8. Secure File Transfer & Sharing Features

7. TIMELINE

- **RFP Issued:** June 1, 2025
- **Proposal Deadline:** June 30, 2025
- **Vendor Presentations (if needed):** July 1-31, 2025
- **Selection Notification:** September 1, 2025
- **Project Start Date:** January , 2026



8. SUBMISSION & CONTACT INFORMATION

Submit proposals to: RFP@sgrho1922.org. Subject line: *Records Management RFP – [Your Firm Name]*

Questions can be submitted via email no later than [Insert Deadline].

9. CONFIDENTIALITY

All information and documents shared during the RFP process are confidential and intended solely for the purpose of proposal evaluation by Sigma Gamma Rho Sorority, Inc. Any distribution or use of the information for purposes outside of this RFP is strictly prohibited.