

Request for Proposal (RFP): Development of Financial Management Software for Police Welfare Bureau (PWB)

Introduction:

The Police Welfare Bureau (PWB) plays a crucial role within the Kerala Police department, dedicated to enhancing the well-being of police officers and their families. Acknowledging the necessity for efficient financial management, PWB has decided to develop specialized software to streamline monthly subscription, loan accounts, and records. With a vast membership of around 50,000 police personnel and more than 100 units spread across the state of Kerala, the software aims to significantly enhance operational efficiency and financial transparency. Recognizing the need for efficient financial management, PWB has decided to develop specialized software to streamline monthly subscription, loan accounts, and records.

The selected firm will be responsible for the following:

1. Subscription Details:

- Assess the current system (manual) related to subscription management.
- Identify and document specific requirements for managing subscription details, including member information, payment processing, and subscription tracking.
- Explore the need for integration with existing systems or databases.

2. Loan Management:

- Evaluate existing loan management processes and systems.
- Identify and document requirements for a robust loan management system, covering aspects such as loan initiation, approval workflows, disbursement, and tracking.
- Define user roles and permissions related to loan management.

3. Recovery from Loanees:

- Analyse the current loan recovery processes.
- Identify and document requirements for efficient and effective loan recovery, including installment tracking, notifications, and reporting.
- Explore strategies for handling delinquencies and defaults.

4. Integration Requirements:

- Assess the need for integration between subscription details, loan management, and recovery modules.
- Identify dependencies and potential challenges related to integration.

5. Security and Compliance:

- Analyse security requirements for protecting sensitive financial data related to subscriptions and loans.
- Ensure compliance with relevant industry standards and regulations.

6. **User Experience (UX) Design:**

- Explore user requirements for an intuitive and user-friendly interface for subscription details, loan management, and recovery processes.
- Define UX design considerations to optimize user engagement.

I. **Scope of Work:**

1. **User Management:**

- Efficiently manage user roles including super users, unit-level users, and approval users.
- Develop a streamlined workflow and collaboration system for controlled data entry and application processing.
- Implement access controls and permissions for each user type to accommodate the large-scale user base.

2. **Application Management:**

- Design a user-friendly interface for the initiation, submission, and tracking of loan and grant applications.
- Develop necessary fields for application submission, ensuring comprehensive information for approval processes.
- Enable a secure and organized system for managing a high volume of applications.

3. **Loan Management:**

- Implement a monthly upload system for centralized loan recovery data.
- Integrate a notification and alerts system for pending tasks and reminders.
- Create functionalities for actions such as writing off the loan, closing/canceling loans, and converting loans to grants to manage the diverse financial needs of a large member base.

4. **Subscription Management:**

- Develop a monthly upload system for centralized subscription data.
- Integrate a notification and alerts system to ensure timely actions, considering the scale of the user base.
- Enable the facility for unit users to query pending actions or seek clarifications.

5. **Report Management:**

- Implement comprehensive report generation features in various formats (pdf, excel, CSV) to cater to the reporting needs of a large organization.
- Support detailed data analysis and reporting to facilitate informed decision-making.
- Ensure the system can generate reports based on various parameters and user requirements.

6. **Data Analysis:**

- Develop robust data analysis features for viewing, querying, and generating pdf files, taking into account the vast dataset.
- Ensure the system supports detailed analysis and data visualization to accommodate the diverse needs of a large member base.

II. Project Overview: User Management:

1. **Super User (PHQ):**

- Administrative role with highest access.
- Authority over the entire application.
- Manage other users, configurations, and settings.

2. **Unit Level Users:**

- Responsible for data management at the unit level.
- Restricted access limited to assigned unit.
- Submit applications and perform data entry specific to their unit.

3. **Approval Users:**

- Review and approve applications submitted by unit level users.
- Limited access focused on reviewing and validating data.
- Can reject or approve applications based on criteria.

4. **Access Control and Permissions:**

- Super users define roles and set permissions.
- Permissions allow or restrict actions based on user's role.

5. **Workflow and Collaboration:**

- Structured workflow for application submission and review.
- Collaboration between unit level and approval users.
- Notifications for pending tasks promote timely decision-making.

Application Management:

- Unit user initiates a loan or grant application.
- Super admin evaluates applications for approval, rejection, or redirection.

Fields Required for Application Submission:

- FILE NO
- NAME OF APPLICANT
- MOTHER UNIT
- PRESENT UNIT
- ...

Fields Required for Sanctioned Loan/Grant:

- MEETING DATE
- LOAN/GRANT/EMERGENCY GRAND
- CHEQUE/DD/FUND TRANSFER DETAILS
- ...

Loan Management:

- Unit users upload monthly loan recovery data.
- Integrated notifications and alerts for timely actions.

Fields for Monthly Loan Data Upload:

- PEN NUMBER
- CURRENT YEAR
- MONTH
- ...

Subscription Management:

- Unit users upload monthly subscription data.
- Integrated notifications and alerts for timely actions.

Fields for Monthly Subscription Data Upload:

- PEN NUMBER
- MOTHER UNIT
- PRESENT UNIT
- ...

Report Management:

- Comprehensive report generation features.
- Reports in pdf, excel & CSV format.

Data Analysis:

- Comprehensive data analysis features.
- View and generate pdf files.

III. Proposal Submission: Interested start-ups are requested to submit proposals no later than [Insert Deadline] through Kerala Startup Mission. Proposals should include:

- Company profile and relevant experience.
- Details of past projects related to software development and security.
- Technical approach and methodology.
- Proposed timeline and milestones.
- Cost estimate with a breakdown.
- Team composition and qualifications.
- Certifications from past clients for the last five completed projects.
- Any additional relevant information.

IV. Evaluation Criteria: Proposals will be evaluated based on:

- Experience and expertise.
- Technical approach and methodology.
- Cost-effectiveness.
- Compliance with government guidelines.
- Timeliness and project management capabilities.
- Additional recommended services.

V. Timeline:

- RFP Issuance Date: 05/01/2024
- Proposal Submission Deadline: 15/01/2024
- Evaluation and Selection: 15/01/2024 to 20/01/2024
- Project Commencement: 30/01/2024

VI. Contact Information: For inquiries, please contact Mr. Praveen V.P (9995506328) or Email: webadminsrb.pol@kerala.gov.in.
