



United Nations Procurement Division

REQUEST FOR INFORMATION (RFI)

This notice is placed by UNPD. The accuracy, reliability and completeness of the contents of furnished information is the responsibility of United Nations Procurement Division. You are therefore requested to direct all queries regarding this RFI to United Nations Procurement Division using the fax number or e-mail address provided below.

Title of the RFI:

Workflow Management System for Legal and Business users

Date of this RFI: 16 June 2026**Closing Date for Receipt of RFI:** 15 July 2026**RFI Number:** RFIUNPD24496**Beneficiary Country/Territory:** United States of America**Commodity/Service category:** Financial Services**Address RFI response by fax or e-mail to the Attention of:** Ricardo Velez Castellon**Fax Number:****E-mail Address:** ricardo.velezcastellon@un.org**UNSPSC Code:**

43231512 - License management software
43232304 - Data base management system software
43232408 - Web platform development software
43233203 - Network security or virtual private network VPN management software
43233405 - Device drivers or system software
43233501 - Electronic mail software
81111504 - Application programming services
81112201 - Maintenance or support fees



DESCRIPTION OF REQUIREMENTS

Purpose of the Request:

The Office of Investment Management (OIM) of the United Nations Joint Staff Pension Fund (UNJSPF) is seeking information on providers for a legal workflow and matter management platform that enables configurable processes between business teams and Legal teams. The proposed solution should meet the requirements of all OIM teams to easily track the status of the legal matter throughout the lifecycle.

The proposed solution, at a minimum, should include the following requirements:

1. Ability to have a configurable workflow engine for Legal team whereby the Legal team enters a matter, and the workflow to allow a real-time tracking feature for status, indicating the current holder, readiness for signing, completion of signature, and relevant status information and for such information to be easily extractable.
2. Ability to store standard clauses, provisions, template documents and other reference documents prepared and saved by different OIM teams for future use.
3. Ability to have a customizable access rule for documents and matters (set restricted access).
4. Ability to have functionalities to allow privileged end-users to subjectively categorize the progress of documents as early, mid, or late stage.
5. Ability to append comments for the final approver's awareness prior to signature.
6. Ability to have workflow design steps, rules and approvals, and route tasks.
7. Ability to provide a standardized, customizable form accessible by various sections/teams, capable of auto-filling based on the requests received.
8. Ability to have Integration with collaboration tools (e.g., Microsoft Teams, Outlook, SharePoint) to streamline follow-ups and audits.
9. The solution should be modular, interoperable that supports structured intake, workflow routing, approvals, document handling, and seamless integration with the wider digital ecosystem.
10. Ability to have a search functionality to locate legal documents easily by type, counterparty, year, matter name, key words or tags.
11. Ability to send a notification email and have the legal matter cataloged accordingly and escalation.
12. Ability to append comments for the final approver's awareness prior to signature.
13. Ability to flag subsequent actions or tasks, such as forwarding to specific teams, signing, or procurement processes.
14. Ability to route documents through multiple approval levels based on document type, and financial threshold or as may be set in the System and updated from time to time.
15. Ability to see in one place the matters pending for each user.
16. Ability to assign matters to other officers.
17. Ability to have sequential, parallel, and conditional routing.
18. Ability to have automated notifications and escalation for overdue tasks.
19. Ability to have internal and users from different UN entities use the system.
20. Ability to integrate with electronic signature tools (e.g., DocuSign, Adobe Sign).
21. Ability to provide a mobile version of the system, including a dedicated mobile application, enabling authorized users to securely access the system from mobile devices. The mobile application should support key functions such as viewing assigned matters and document status, receiving notifications, reviewing documents, adding comments, and performing approval actions, subject to applicable access controls and audit requirements.



SPECIFIC REQUIREMENTS / INFORMATION (IF ANY)

Vendors should provide an overview of their product and services with a brief description of how their solution supports the above requirements.

Qualifying vendors may be invited to provide a demonstration.

Company information:

The Vendor should also provide a brief history of their company, how it is organized to support the proposed solution, and how its available products and resources will be used to meet UNJSPF/OIM requirements. The vendor shall submit the following information:

- The company's official name and address. The vendor shall also indicate what type of entity it is — for example, a corporation or a partnership.
- The name, address and telephone number of the person who receives correspondence and who is authorized to make decisions or represent the vendor. Please state this person's capacity within the company.
- The total number of years the vendor has been in business and, if applicable, the number of years it has operated under the present business name.
- The number of years the vendor has been providing the proposed solution.
- A description of the vendor's operations: facilities, business and objectives, and the number of employees, and client support services.

Services and Pricing structure:

- Please indicate the nature of your pricing model and as well as the metrics used to price your solution (e.g., flat fee, per module, per portfolio, per users, etc.).
- Please describe your implementation approach and the pricing / rates for your implementation services.
- Please describe your client support model and the pricing of related support services.

Interested vendors are invited to register on the United Nations Global Marketplace (UNGM) at www.ungm.org and express their interest through the platform. Supporting documentation should be submitted by email to ricardo.velezcastellon@un.org, quoting the RFI reference number in the subject line.

NOTE

Information on tendering for the UN Procurement System is **available free of charge** at the following address: <https://www.ungm.org/Public/Notice>

Only the United Nations Global Marketplace (UNGM) has been authorised to collect a nominal fee from vendors that wish to receive automatically Procurement Notices or Requests for Expression Of Interest. Vendors interested in this Tender Alert Service are invited to subscribe on <http://www.ungm.org>

Vendors interested in participating in a potential future solicitation process should submit the Vendor Response Form of this RFI electronically (through the link available on the next page) before the closing date set forth above.



VENDOR RESPONSE

NOTICE

- Companies can only participate in solicitations of the UN Secretariat after completing their registration (free of charge) at the United Nations Global Marketplace (www.ungm.org).
- Please verify that your company is registered under its **full legal** name on the United Nations Global Market Place (www.ungm.org) and that your application for registration as vendor has been submitted to the **UN Secretariat** in the same site, to be able to participate in any potential solicitation process as a result of this RFI.
- While companies can participate in solicitations after completion of registration at Basic Level, we strongly recommend all companies to register at least at **Level 1** under the United Nations Secretariat prior to participating in any solicitations.
- Companies are reminded of the restrictions of employment of former UN personnel that were involved in the procurement process during their last three years of service as per [ST/SGB/2006/15](#), including (a) employing those personnel for one year after separation of service and (b) allowing those personnel to communicate with, or appear before, active UN personnel for matters related to the procurement process for two years after separation of service. Violation of the provisions of ST/SGB/2006/15 may lead to suspension of the registration of the company as a UN vendor.

PLEASE NOTE: You should submit your response to this RFI electronically at:

<https://www.ungm.org/Public/Notice/304359>

In case you have difficulties submitting your response electronically, please contact ricardo.velezcastellon@un.org directly for instructions.



RFI INSTRUCTIONS

1) Registering as a Vendor with the United Nations

Vendors interested in fulfilling the requirement described above must be registered at the UN Global Marketplace (www.ungm.org) with the UN Secretariat in order to be eligible to participate in any solicitation. Information on the registration process can be found at <https://www.un.org/Depts/ptd/vendors>.

Prerequisites for Eligibility

In order to be eligible for UN registration, you must declare that:

- A. Your company (as well as any parent, subsidiary or affiliate companies) is not listed in, or associated with a company or individual listed in:
 - I. the Compendium of United Nations Security Council Sanctions Lists (<https://www.un.org/securitycouncil/content/un-sc-consolidated-list>), or
 - II. the IIC Oil for Food List website or, if listed on either, this has been disclosed to the United Nations Procurement Division in writing.
- B. Your company (as well as any parent, subsidiary or affiliate companies) is not currently removed or suspended by the United Nations or any other UN organisation (including the World Bank);
- C. Your company (as well as any parent, subsidiary or affiliate companies) is not under formal investigation, nor have been sanctioned within the preceding three (3) years, by any national authority of a United Nations Member State for engaging or having engaged in proscribed practices, including but not limited to: corruption, fraud, coercion, collusion, obstruction, or any other unethical practice;
- D. Your company has not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against your company that could impair your company's operations in the foreseeable future;
- E. Your company does not employ, or anticipate employing, any person(s) who is, or has been a UN staff member within the last year, if said UN staff member has or had prior professional dealings with the Vendor in his/her capacity as UN staff member within the last three years of service with the UN (in accordance with UN post-employment restrictions published in ST/SGB/2006/15).
- F. Your company undertakes not to engage in proscribed practices (including but not limited to: corruption, fraud, coercion, collusion, obstruction, or any other unethical practice), with the UN or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the UN.

For Registered Vendors: Vendors already registered at the UN Global Marketplace with the UN Secretariat must ensure that the information and documentation (e.g. financial statements, address, contact name, etc.) provided in connection with their registration are up to date in UNGM. Please verify and ensure that your company is registered under its full legal name.

For Vendors Interested in Registration: Vendors not yet registered should apply for registration on the United Nations Global Marketplace (<http://www.ungm.org>); information on the registration process can be found at <https://www.un.org/Depts/ptd/vendors>. Vendors must complete the registration process prior to the closing date of the RFI. Vendors who have not completed the UNGM registration process with the UN Secretariat before the closing date of the RFI are not considered eligible to participate in the potential solicitation process related to the RFI. We strongly recommend all companies to register at least at Level 1 under the UN Secretariat prior to participating in any solicitations.

IMPORTANT NOTICE: Any false, incomplete or defective vendor registration may result in the rejection of the application or cancellation of an already existing registration.

2) RFI Process

Vendors interested in participating in the potential solicitation process should forward their information (as requested in the RFI) to United Nations Procurement Division (UNPD) by the closing date set forth in this RFI. *Due to the high volume of communications UNPD is not in a position to issue confirmation of receipt of RFIs.*

Please note that no further details of the potential solicitation can be made available to the vendors prior to issuance of the solicitation documents.

This RFI is issued subject to the conditions contained in the RFI introductory page available at <https://www.un.org/Depts/ptd/rfi>.



