

NATIONAL HOUSING FINANCE CORPORATION (NHFC)

Invitation to Bid

Bid Description: REQUEST FOR INFORMATION FOR AN ENTERPRISE RESOURCE PLANNING SOLUTION

Tender Number: NM01/12/2022



Issued by:

NHFC

The Isle of Houghton

Old Trafford 3, 1st Floor

11 Boundary Road

Houghton

Johannesburg

Full Name of Bidding/Tendering Entity:

Contact Person:

Tel Number:

Advert Date:

12 December 2022

Non-compulsory briefing session:

17 January 2022 @ 11:00 on MS Teams

Closing Date and Time:

03 February 2023 at 11:00

Bid enquiries:

Tenders01@nhfc.co.za

Bidder's Authorised Signatory:

Initials and Surname:

Signature:

BID DOCUMENTS CHECK LIST:

The contents of the BID document must be as follows, and numbered as per the numbering below, with each schedule punched, placed in a file and separated from the next schedule with a file divider.

Please complete the checklist below to verify your submission of the relevant documents:

Schedules	Description	Submitted – Indicate YES or NO
Annexure 1	Tax Compliance Status Pin	
Annexure 2	Copies of Company Registration Documents	
Annexure 3	Copy of Valid B-BBEE certificate or Affidavit.	
Annexure 4	Company Profile	
Annexure 5	SBD 1: Invitation to Bid	
Annexure 6	SBD 4: Bidder's Disclosure	
Annexure 7	SBD 6.1: Preference Point Claim Form in Terms of Preferential Procurement Regulations 2017	
Annexure 8	List of partners / directors of firm.	
Annexure 9	One (1) original hard copy and a soft copy of the RFI (USB) must be submitted in a sealed envelope, appropriately addressed.	
Annexure 10	Protection of personal information Consent Form	

TABLE OF CONTENTS

PART 1: TENDERING PROCEDURE

Invitation to bid (SBD 1)..... 5

Terms of Reference..... 12

PART 2: RETURNABLE DOCUMENTS

SBD 4 Bidder’s Disclosure 29

SBD 6.1 Preference Points claim form..... 32

Resolution to sign 37

Protection of personal information Consent form 38

SBD 1 INVITATION TO BID – PART A

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE NHFC SOC LTD.					
BID NUMBER:	NM01/12/2022	CLOSING DATE:	03 February 2022	CLOSING TIME:	11:00
DESCRIPTION	REQUEST FOR INFORMATION FOR AN ENTERPRISE RESOURCE PLANNING SOLUTION				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Pabalelo Shirindza		CONTACT PERSON		
TELEPHONE NUMBER	011 644 9800		TELEPHONE NUMBER		
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER		
E-MAIL ADDRESS	tenders01@nhfc.co.za		E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] Yes No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] Yes No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS			
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.			

PART B

TERMS AND CONDITIONS FOR BIDDING

BID SUBMISSION:

BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED--(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.

THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

TAX COMPLIANCE REQUIREMENTS

2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.

2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.

2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.

2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.

2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g., company resolution)

DATE:

BID TERMS AND CONDITIONS

1. DEFINITIONS

- (a) The word “Bidder” in these conditions shall mean and include any firm of Contractors, Suppliers, Service Providers or any company or body incorporated or unincorporated.
- (b) The word “Employer” in these conditions shall mean the NHFC.

2. REQUIRED DOCUMENTS

- a) Tax Compliance Status Pin (TCS Pin);
- b) Copy of Valid B-BBEE Certificate/ Sworn Affidavit ;
- c) Proof of Company Registration;
- d) Company Profile
- e) Submission of the following Signed and Completed Standard Bid Documents (SBD) Forms
 - SBD 1: Invitation to Bid
 - SBD 4: Bidders Disclosure
 - SBD 6.1: Preference Points Claim Form in terms of preferential procurement
- f) List of partners / directors of firm.
- g) Protection of personal information Consent form

All forms, annexures and addendums shall be signed and completed and returned with the Bid Document as a whole.

3. BID DOCUMENT

- (a) The bid document must be completed in all respects in non-erasable ink.
- (b) Bids must be submitted on original bid documents.
- (c) Bid documents must remain intact and no portion may be detached.

4. VALUE ADDED TAX

In calculating the cost of the supply and delivery of services and / or material, the supplier will issue a “Tax Invoice” for all services rendered and / or materials supplied, which will reflect the exclusive cost of such services, goods or materials with the relevant Value Added Tax being added to the total. VAT must be included in the Bid price but must be shown separately.

5. AUTHORITY TO SIGN BID DOCUMENTS

In the case of a Bid being submitted on behalf of a company, close corporation or partnership, evidence must be submitted to the employer at the time of submission of the Bid that the Bid has been signed by persons properly authorised thereto by resolution of the directors or under the articles of the entity.

6. SUBMITTING OF BIDS

Bids must be submitted in sealed envelopes clearly marked **REQUEST FOR INFORMATION FOR AN ENTERPRISE RESOURCE PLANNING SOLUTION.**

The Bid must be deposited in the bid box at the below address:

The Isle of Houghton
Old Trafford 3, 1st Floor
11 Boundary Road
Houghton
Johannesburg

7. CLOSING DATE AND TIME

Bid should reach the above address for submission by no later than **11:00 a.m. on 03 February 2023**. No late bids will be accepted or considered.

8. BID ENQUIRIES

Please refer all enquiries to the below mentioned persons for assistance during normal office hours viz. 08:30 – 16:30 Mondays to Fridays.

Bidding Procedure Enquires

Name: Pabalelo Shirindza

Email address: Tenders01@nhfc.co.za

GLOSSARY AND DEFINITION

	GLOSSARY	DESCRIPTION
1.	Activity	An Activity is a task or deliverable on a project. It can be work, or delivery of materials. E.g., Foundation - Can be a % of a task, e.g. 50% of Foundation, and 100% of foundation. Will have various statuses: Claim received, Certified, Checked, Request for payment, Paid, Balance
2.	AP	Approved Person – person with rights to claim funds on a project from a company listed and approved on the project.
3.	BCIC	Board Credit Investment Committee
4.	BPM	Business Process Mapping
5.	Builder/ contractor	The construction company contracted to develop the houses on the project site.
6.	Client	Refer to internal and external NHFC clients namely: Employee, Intermediary, Subsidiary and Tenant.
7.	Consultants/ Professional Team member	Can be any company such as Engineer, Plumber, etc.
8.	CRM	Customer Relationship Management
9.	EA	Enterprise Architecture
10.	Financial Data	Tranches of funds received, Budget of when to be paid, Interest on Monies not disbursed, Fees.
11.	FMS	Fund Management System
12.	GIS	Geographical Information System
13.	HSS	Housing Subsidy System
14.	Interest	Earned on funds not yet disbursed and is specific to the project.
15.	MCIC	Management Credit Investment Committee
16.	Milestone	A milestone is any activity that is of significance. Any Activity can be flagged as a Milestone. Can contain multiple tasks. Any task/ Deliverable that can be listed on

INTRODUCTION

The National Housing Finance Corporation Soc Ltd was established in 1996 by the Department of Human Settlements (NDoHS) as a Development Finance Institution with the principal mandate of broadening and deepening access to affordable housing finance for the low–middle income South African Households. The NHFC is a Schedule 3A entity according to the Public Finance Management Act, 1999.

The Department of Human Settlements is in the process of establishing a Human Settlements Development Bank (“HSDB”). The purpose of which is to position the HSDB as a vehicle to provide effective public and private funding, financing support to key segments of the housing market, in the face of considerable market challenges, significant need and a challenged fiscus.

In 2008, the National Treasury undertook a review of the mandates of South Africa’s Development Finance Institutions (DFIs) at the request of Cabinet. The review was conducted in consultation with the national departments responsible for the DFIs. To support expanded housing delivery, the Treasury Review recommended amalgamating the three-housing sector DFIs into a single institution in order to have greater impact, viability and increased scale.

The National Housing Finance Corporation SOC Ltd (NHFC) has now merged with National Urban Reconstruction and Housing Agency (NURCHA) and Rural Housing Loan Fund (RHLF) (all 3 entities previous human settlements DFIs) to deliver quality financial support to scale up delivery of the development of a sustainable and integrated human settlement in the country. The NHFC needs to strategically reposition itself as the Human Settlements DFI of choice through significantly enhancing its product offering, financial strength and building capabilities in order to make a positive developmental impact, whilst balancing the challenges of financial sustainability and developmental imperative. This will be achieved through the establishment of the HSDB.

The NHFC remains largely a wholesale funder providing funding in the affordable housing market through a network of clients that include social housing institutions, large scale property developers and investors, non-banking retail intermediaries. In addition, it facilitates implementation of a programme on behalf of the Department of Human Settlements which is focused on providing a subsidy for first time homebuyers, known as the Finance Linked Individual Subsidy Programme.

The organisation therefore embarked on a journey to standardize, optimise, and digitise business processes, systems and its ICT infrastructure to align with current and future business goals. This is in line with its approved ICT strategy which supports digital transformation, operational efficiencies, business growth, ICT enablement and the modernization of ICT as a division and the entire organisation. The introduction of architecture practices and principles will enable the NHFC to build from firm foundations and be able to successfully execute its business strategy. Therefore, the organisation appointed a service provider to partner with them on the implementation of an Enterprise Architecture (EA) and Business Process Management (BPM) Project. The project has been successfully completed and the organisation therefore seeks to implement the recommendations and initiatives that emanated from the findings of the project, amongst which is the implementation of the Enterprise Resource Planning.

PURPOSE OF THE REQUEST FOR INFORMATION

- 1.1** The purpose of the request for information is to request service providers to provide inputs into the developed specifications;
- 1.2** To identifying appropriate suppliers who can respond to an RFP on the provision of an ERP solution.
- 1.3** Gather information on the suppliers available in the South African market;
- 1.4** Consider the degree to which commercially available ERP solutions are likely to meet the NHFC's business requirements;
- 1.5** Obtain representative cost estimates for ERP or equivalent software, including licensing/subscription fees, annual maintenance costs, and other ongoing costs that can be used for budgetary and planning purposes; and
- 1.6** Estimate costs and timelines for procurement and implementation of the ERP solution.

NB: This is not a solicitation for quotations, bids, or proposals. NHFC may contact Respondents, at its sole discretion, for additional information. The NHFC shall not be obligated to contact any Respondent, to purchase goods or services related to this RFI from any Respondent, or to use the content of any response in a future RFP.

2. OBJECTIVES OF THE ERP DEPLOYMENT.

NHFC's purpose and goal is to take advantage of a modern ERP system that is designed around best practices which will allow the NHFC to streamline and improve processes that result in timely, accurate, and easy-to-access information. More specifically, the ERP system that would meet the following objectives:

- 2.1** Consolidate information, link processes and functions, and eliminate separate departmental systems. Currently there are siloed applications that are not integrated across the business divisions;
- 2.2** Streamline business processes to take advantage of best practices through automation, integration, and workflows;
- 2.3** Provide a user-friendly and intuitive user interface to promote system use and productivity. Currently, there are bespoke outdated legacy applications in use that have not been maintained or updated and are not part of any maintenance/support agreements with their development houses;
- 2.4** Eliminate the need for redundant data entry;
- 2.5** Eliminate the need for manual input when preparing the annual budget and financial statements;
- 2.6** Improve and/or provide necessary reports and reporting capabilities, and access to data through inquiry or drilldown capabilities;
- 2.7** Integrate with other systems that are in the operating environment, including banks;
- 2.8** Provide seamless interface capabilities with third-party systems; and
- 2.9** Address audit issues related to legacy systems in the NHFC environment.

In addition to the functionality identified above, NHFC is soliciting response to provision of information of the required professional services (e.g. best practices guidance, data conversion, system configuration, training, testing, project management, interface, warranties etc.) that will help ensure a successful ERP implementation in a timely and professional manner.

3. EXPECTED PROJECT OUTCOMES

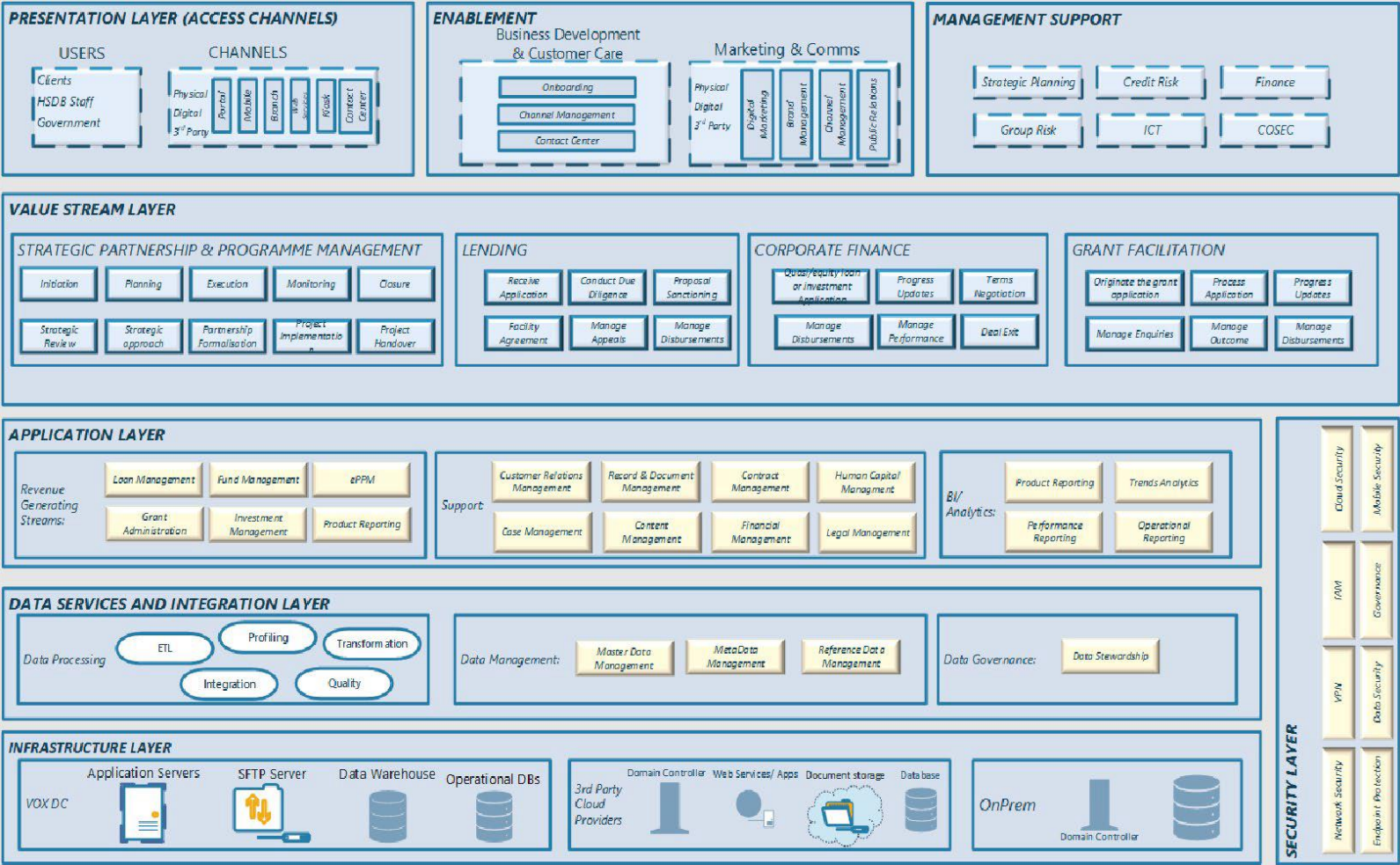
There are many dimensions to the strategy of the ERP deployment project of NHFC, and they are formulated around the possibilities offered by ERP solutions.

- 3.1** Standardization: - standardization of processes, records, terminology, information exchange mechanisms.
- 3.2** Proven solutions:- With the scale and criticality of its activities in mind, NHFC has identified that a proven ERP solution would address the following.
 - 3.2.1** The integration of processes – the ERP Solution to provide an ICT platform that integrates end-to-end processes of NHFC;
 - 3.2.2** Best Practices in the housing, development finance sector and public entities – the ERP solution to benchmark with global best practices and processes in the areas of lending, grant facilitation, project management, financial management, procurement, materials management, human resources, treasury management amongst others;
 - 3.2.3** Multi-channel delivery – the ERP solution to be able to facilitate transactions to be carried out through multiple devices and computer systems, thereby, facilitating multi-channel service delivery to NHFC employees, strategic partners, intermediaries, funders, local and international funding agencies subsidiaries, shareholders, third-party service providers and South African citizens,

A platform to address the evolving needs and future strategic direction – The operational characteristics of NHFC are evolving. The ERP solution is expected to act as a platform within which the multiple requirements could be addressed effectively.

F1 - Diagram A:

Target Architectural Landscape - This provides a high-level overview of how the NHFC'S components fits together across the business, data, application, technology and security architecture domains



4. ANTICIPATED ERP IMPLEMENTATION

The implementation of the ERP should cover the following functions.

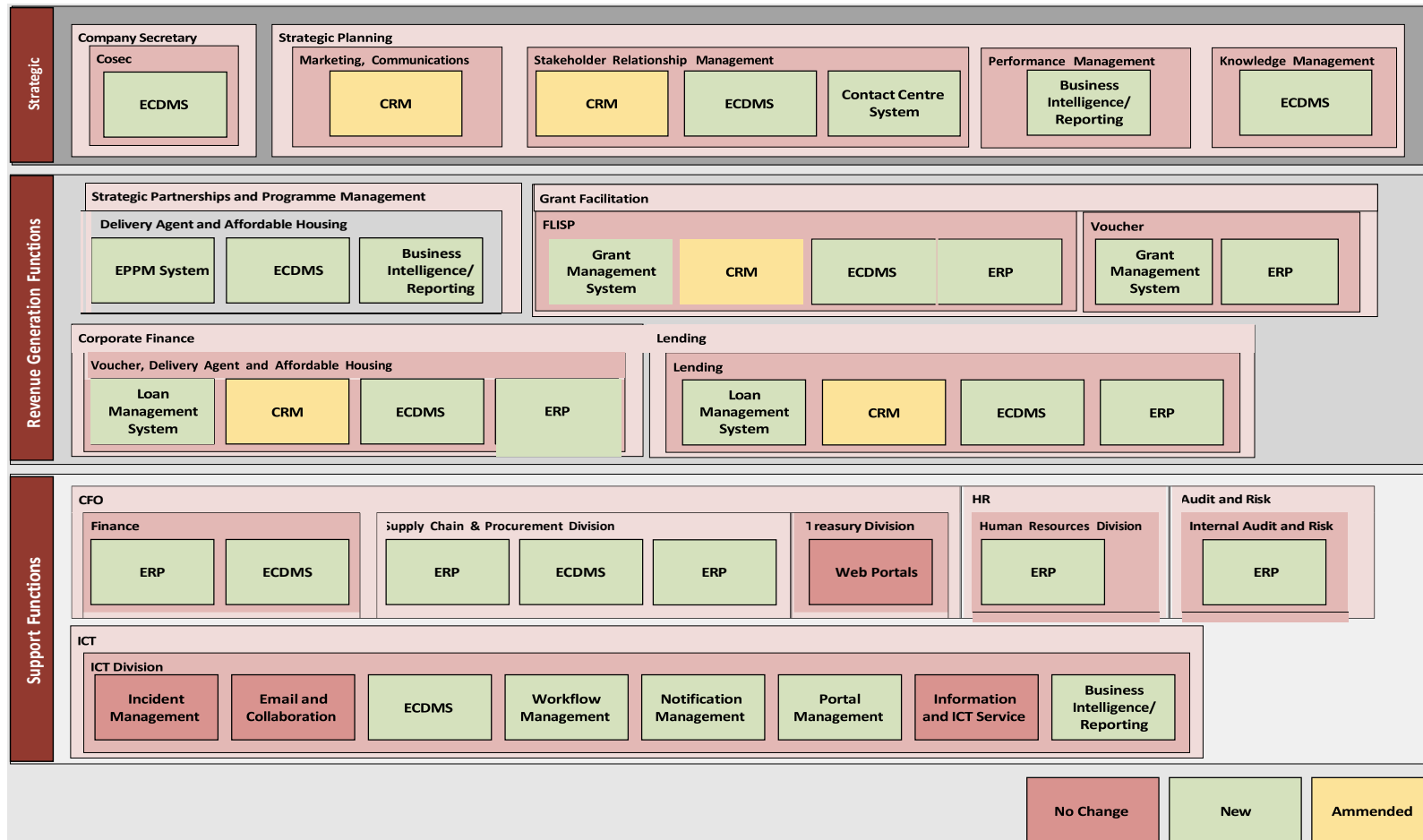
- 4.1** Loan and Grant Management System: Solution that caters for the requirements of all divisions and different products;
- 4.2** Centralised Business Intelligence/ Reporting solution based of a centralised data warehouse to support the organisations reporting requirements;
- 4.3** Finance and accounts;
- 4.4** Asset management;
- 4.5** Treasury and Working capital management;
- 4.6** Banking Interfaces;
- 4.7** Core Human Resources, Time and Attendance, Talent, Payroll management, Contingent Workforce Management, Employee Wellness Management, Employee Relations, HR Shared Service Centre and other administration.
- 4.8** Procurement and contracting Management including e-procurement, Procure-to-Pay, Supplier Performance Management, Management and Reporting of Irregular, Fruitless & Wasteful Expenditure; BBBEE Reporting, SCM Shared Services
- 4.9** Materials management;
- 4.10** Governance, Risk and Compliance;
- 4.11** Projects and Investment management;
- 4.12** Geographical Information System;
- 4.13** Implement workflow management, notification management and portal management to support the automation, dissemination and access to information for all NHFC stakeholders;
- 4.14** Integration module to integrate other applications internally and externally;
- 4.15** Enterprise Content and Document Management Solution to manage content and manage the document retention needs of the organisation;
- 4.16** Customer Relationship management systems that can be used by all divisions and configured to cater for their specific requirements.

NB: These are not exhaustive, however indicative high-level functions. Respondents are encouraged to include capabilities/functionalities that are over and above capabilities desired by the NHFC to ensure all that business requirements are met successfully. For further information refer to Annexure

F2 - Diagram B:

Target NHFC Logical Application Architecture

This model provides a view of the logical applications requirements that could consist of existing solutions, new solutions to be procured or solutions that could be developed within the NHFC.



5. SCOPE OF WORK

5.1 TECHNICAL SPECIFICATIONS FOR THE PROJECT

5.1.1 Scope of the ERP solution

The scope and characteristics of the ERP solution to be proposed by the Response to meet the minimum requirements of the NHFC by covering the following aspects, amongst others:

- 5.1.1.1** Business process and the functional divisions of the NHFC;
- 5.1.1.2** User base of the NHFC;
- 5.1.1.3** Solution Capabilities and features;
- 5.1.1.4** Solution Integration; and
- 5.1.1.5** Future expansion and future proofing.

5.1.2 Scope of work for the project

The scope of ERP implementation services to be provided by the response should include the following:

- 5.1.2.1** Supply and implement (Configure/customize) the ERP as per requirements of NHFC;
- 5.1.2.2** Integration and/or interface for banking transactions;
- 5.1.2.3** Providing implementation and project management services;
- 5.1.2.4** Sizing the required infrastructure or hosting requirements for ERP solution and installing the ERP solution;
- 5.1.2.5** Data Cleaning, Quality and Migration;
- 5.1.2.6** Training the users and facilitating the adoption of the ERP solution by the users/employees of NHFC;
- 5.1.2.7** Providing application support for 36 months after completing the implementation of the ERP Solution;
- 5.1.2.8** Setting up the Center of Excellence (CoE); and

- 5.1.2.9** Providing skilled staff to augment the capacity of NHFC in continuous improvement/adoption of the ERP solution.

5.1.3 Scope of work for implementation

The scope of work for implementation of the ERP solution are defined by using the following areas in conjunction with each other:

- 5.1.3.1** The solution modules of the proposed ERP Solution that covers end-to end business requirements;
- 5.1.3.2** The best practices and statutory requirements as applicable to public entities and banking/financial sectors;
- 5.1.3.3** The solution features/capabilities of ERP solution;
- 5.1.3.4** The functional division of NHFC;
- 5.1.3.5** The processes of NHFC;
- 5.1.3.6** The solution users;
- 5.1.3.7** The Integration requirements – fully integrated components; and
- 5.1.3.8** The implementation stages, activities, methodology and standards of implementation of ERP.

6. RESPONDENT CHARACTERISTICS

6.1 The Technical proposal for ERP Solution should contain details of the solution components proposed along with how each of the solution components would meet the requirements of NHFC. The technical proposal should address the followings: - Functional coverage of the solution proposed.

- 6.1.1** The complete landscape of the solution with modules, integration points etc;
- 6.1.2** How the different processes of NHFC are integrated with the solution;
- 6.1.3** The bill of material of the ERP solution with a list of all the modules, tools independently priced items along with metrics for licensing (pricing) and total quantity proposed;
- 6.1.4** The rationale for the different solution components and the licensing metrics;

- 6.1.5** The rationale for the sizing of the different modules of the ERP;
- 6.1.6** How the solution components are sized and their relationship to licensing metrics;
- 6.1.7** The details of third-party solutions if any, their description and purpose, licensing

7. QUESTIONNAIRE

Respondence are kindly requested to submit detailed feedback in response to the following questions. Providers are kindly requested to provide links and/or documentation related to and supporting their replies. Providers are encouraged to provide information that is over and above the NHFC's provided questionnaires

#	Questionnaire	Detailed responses and References where applicable
7.2.1	Does the proposed application offer all the functionalities required as a single application solution covering real time posting.	
7.2.2	Please describe the ERP solution's core features and functionality.	
7.2.3	Does the proposed ERP solution have all the core modules with required functions as natively integrated applications on a single interoperable open platform?	
7.2.4	Please provide a technical description of the solution.	
7.2.5	Does the ERP Solution provide wide range of security features such as Single Sign-On (SSO), Multi-factor Authentication, Authorisation and Integrated User management?	
7.2.6	Does the solution provide implementation, administration	

	and operational tools seamlessly integrated with the product?	
7.2.7	Does the solution require third party application integration?	
7.2.8	Kindly indicate which components and/or modules are incorporated in the proposed core solution and which components and/or modules will be sourced from third parties and would therefore require integration	
7.2.9	Does the solution provide flexibility to customize the standard application functionality to suit the specific NHFC's business needs?	
7.2.10	What aspects or features of the solution allow for customisation?	
7.2.11	How are customisations managed during implementation and once in production?	
7.2.12	Does it provide an application architecture which can be integrated with third party/ legacy applications using the built-in integration tools;	
7.2.13	How responsive is the solution to adapt interface to any device?	
7.2.14	Does the ERP Application have the ability to provide concise overview of parameters like configuration changes, infrastructure usage, performance, required maintenance activities, potential security issues, status of business flows and diagnostic test results.	
7.2.15	Does the ERP solution support multiple levels of reporting including transactional reporting, analytical reporting etc. Does it support reporting on excel sheets as well as format intensive reporting, graphics and will have a facility	

	to drill down;	
7.2.16	How easy is it for the non-technical user to generate, customise and parameterize reports according to the specific user's needs?	
7.2.17	How does the solution enable self-service BI?	
7.2.18	Does the ERP solution come with inbuilt tools for data migration, upgrades	
7.2.19	Does the service provider offer data migration services as part of the implementation of the ERP solution? Please submit your data migration strategy/service details as part of their RFI response.	
7.2.20	The ERP solution should provide a robust set of communication and reporting tools and must be able to auto-trigger emails / SMS communications to concerned as per business rules configured in the system	
7.2.21	Does the ERP Application include tools/ mechanism for System, Database and performance measurement activities	
7.2.22	What database(s) is required for the solution and what are associated costs?	
7.2.23	What Operating Systems are required for the solution and what are the associated costs?	
7.2.24	What is the indicative cost for the procurement, implementation and support of the solution for a 36-month period after implementation? If possible, please provide indicative capital, implementation and recurring costs to be provided.	
7.2.25	What are the typical available service levels that are recommended for the maintenance and support of the	

	solution?	
7.2.26	how does the service provider keep the security posture of the solution up to date?	
7.2.27	What is typical implementation period for the entire solution?	
7.2.28	What is the level of training that will be provided for the solution and what are the associated costs?	
7.2.29	What is the typical number of technical resources required to support the solution?	
7.2.30	Please describe the minimum experience and proficiency of the functional and technical experts/resource required	
7.2.31	What is the level of training that will be provided for the solution and what are the associated costs?	
7.2.32	In addition to the requirements listed above, please include any innovative technologies/functionality that may assist the NHFC to optimise business processes in order to achieve its modernisation objectives.	

7.1 Testing

Describe any tools and enablers included in your implementation approach that facilitate in-depth and efficient functional testing of the ERP system.

7.2 Project Management

7.2.1 Provide a draft project plan specifying resource requirements and implementation milestones/timelines

7.2.2 Include pricing for all training material and train-the-trainer sessions for all NHFC resources

7.2.3 Implementation to include data migration

7.3 Training.

Describe your approach to training the NHFC project team, Business Process owners and system end users. Include perspectives on train the trainer versus consultant led training

delivery, and any successes or lessons learned from computer-based training approaches to effectively train remote or large numbers of end users.

7.4 Organizational Change Management.

Describe your approach to organizational change management and communications for NHFC ERP project, to prepare users for new system adoption. Include in the description any deployments of social media or marketing approaches to reach a broader audience of stakeholders.

7.5 Costing

The price quoted (incl. VAT) must be for implementation of the full solution and should include all costs associated with the requirements above. All licences, hardware, installation, integration, data migration, implementation, project management, training, and support (36 months) costs should be included. Please provide a detailed breakdown of the costing.

7.6 Timeline Recommendation

Describe any recommended deployment approach and timelines based on your experience with similar projects in the Development Finance and public sector. NHFC would like to consider alternatives that may result in cost savings, risk reduction, or other strategic benefits.

7.7 Innovation

In addition to the requirements listed above, please include any innovative technologies/functionality that may assist the NHFC to optimise business processes in order to achieve its modernisation objectives.

8. PRESENTATION

NHFC will require presentations and/or site visits at a stipulated date and time from respondents of RFI as part the submission process. Please note, no participant shall be disallowed or excluded from participation in the bidding process due to non-submission or submission of information in response to this RFI;

9. IMPORTANT INFORMATION

-
- 9.1** NHFC will not reimburse any Respondent for any costs associated with preparing a response to this RFI;
 - 9.2** This RFI is a stand-alone information-gathering and market place analysis exercise, intended only to inform the NHFC;
 - 9.3** No respondent, through submission of information will gain any right to participate in any future process and participates herein on the basis that it is providing information voluntarily to strengthen a potentially beneficial process for all stakeholders;
 - 9.4** No participant shall be disallowed or excluded from participation in the bidding process due to submission of information in response to this RFI;
 - 9.5** NHFC will not contract with any Respondence as a result of this RFI. While NHFC may use responses to this RFI to draft a competitive solicitation for the subject of these services, issuing this RFI does not compel the NHFC to do so;
 - 9.6** After a review of the RFI responses and assessment of the marketplace, the NHFC may or may not choose to issue a Request for Proposal for a provision ERP solution; and
 - 9.7** All materials submitted in response to this RFI become the property of the NHFC.

BIDDER'S DISCLOSURE

PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

Bidder's declaration

Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,
employed by the state?

YES/NO

If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

If so, furnish particulars:

.....

.....

Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

If so, furnish particulars:

.....

.....

3 DECLARATION

I, the undersigned, (name).....in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates

3.4 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.5 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

a) The value of this bid is estimated to exceed R50 000 000 (all applicable taxes included) and therefore the 90/10 preference point system shall be applicable; or

1.3 Points for this bid shall be awarded for:

Price; and

B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	90
B-BBEE STATUS LEVEL OF CONTRIBUTOR	10
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

“B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;

“B-BBEE status level of contributor” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

“bid” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price PROPOSALS, advertised competitive bidding processes or proposals;

“Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

“EME” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

“functionality” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.

“prices” includes all applicable taxes less all unconditional discounts;

“proof of B-BBEE status level of contributor” means:

B-BBEE Status level certificate issued by an authorized body or person;

A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;

Any other requirement prescribed in terms of the B-BBEE Act;

“QSE” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

“Rand value” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20

or

90/10

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

or

$$P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

$P_{\min}$ = Price of lowest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14

4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

5.1 B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

6. SUB-CONTRACTING

6.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES		NO	
-----	--	----	--

6.1.1 If yes, indicate:

What percentage of the contract will be subcontracted. %

The name of the sub-contractor.....

The B-BBEE status level of the sub-contractor.....

Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	
-----	--	----	--

Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at least 51% owned by: **EME** **QSE**

√

√

Black people

Black people who are youth

Black people who are women

Black people with disabilities

Black people living in rural or underdeveloped areas or townships
Cooperative owned by black people
Black people who are military veterans

OR

Any EME
Any QSE

7. DECLARATION WITH REGARD TO COMPANY/FIRM

7.1 Name of company/firm:.....
7.2 VAT registration number:.....
7.3 Company registration number:.....

7.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

7.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....
.....
.....
.....

7.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

7.7 Total number of years the company/firm has been in business:.....

7.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

WITNESSES

.....
.....

.....
SIGNATURE(S) OF BIDDERS(S)

DATE:

ADDRESS

.....

.....

1.1. The Service Provider shall ensure that its employees, representatives and officers, comply with the provisions of the Protection of Personal Information Act, 2013 ("POPIA") and all other applicable data protection laws and, without limitation to the a foregoing, shall ensure the security and confidentiality of all Personal Information processed by that Party is in accordance with POPIA and all other applicable data protection laws.

1.2. The Service Provider must only process personal information of the NHFC and third parties on behalf of the NHFC, with the NHFC's knowledge or authorisation, treat such information which comes to their knowledge as confidential and must not disclose it unless required by law or in the course of the proper performance of the Service Provider's duties. The Service Provider must comply with the responsible party's obligations in clause section 19 of POPIA.

1.3. Where the Service Provider, its agents, subcontractors, officers, directors, shareholders, representatives, or employees has/have access to any Personal Information held by the NHFC for any reason in connection with this Agreement or is/are supplied with or otherwise provided with Personal Information by the NHFC or on behalf of the NHFC for any purpose, or are supplied with or otherwise provided with Personal Information relating to the Services, the Service Provider shall:

1.3.1. process such Personal Information only for purposes of performing its/their obligations under this Agreement and shall not otherwise modify, amend or alter the contents of such Personal Information or disclose or permit the disclosure of such Personal Information to any third party, unless specifically authorised to do so by the NHFC or as required by law or any regulatory authority, and shall take all such steps as may be necessary to protect and safeguard such Personal Information;

1.3.2. without prejudice to the generality of the foregoing, ensure that appropriate, reasonable technical and organisational measures shall be taken by it/them to prevent

1.3.2.1. the unauthorised or unlawful processing of such Personal Information; and

1.3.2.2. the accidental loss or destruction of, or damage to, such Personal Information;
and

1.3.2.3. promptly notify the NHFC when it becomes aware of any unauthorised, unlawful or dishonest conduct or activities, or any breach of the terms of this Agreement relating to Personal Information.

1.4. Both Parties will comply with their obligations under POPIA in relation to personal information for which they are the responsible party.

1.5. The Service Provider must notify the NHFC immediately where there are reasonable

grounds to believe that personal information has been accessed or acquired by any unauthorised person (Data Breach) and must assist the NHFC, at its own cost:

- 1.5.1. with any investigation or notice to the Regulator or data subjects that the NHFC may make in relation to a Data Breach; and
- 1.5.2. in responding to any directions by the Regulator to publicise the Data Breach, including assisting the NHFC to make public announcements if required.
- 1.5.3 The Service Provider indemnifies the NHFC against any civil or criminal action or administrative fine or other penalty or loss as a result of the Service Provider's breach of this clause.

2. POPIA CONSENT

2.1. The Service Provider, by submitting its proposal/ quotation, consents to the use of his/her personal information contained therein and confirms that:

- 2.1.1. The information is voluntarily supplied, without undue influence from any party; and
- 2.1.2. The information is necessary for the purposes of the engagement with NHFC.

2.2. The tenderer acknowledges that he /she is aware of his/her right to:

- 2.2.1. Access the information at any reasonable time for the purposes of rectification thereof;
- 2.2.2. Object to the processing of the information;
- 2.2.3. Lodge a complaint with the Information Regulator.

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)
CERTIFY THAT WE CONSENT TO THE ABOVE AS PER REQUIREMENTS OF THE PROTECTION
OF PERSONAL INFORMATION ACT.

.....
Signature

.....
Date

.....
Position

.....