



RFI NUMBER:	RAF/2024/00041
DESCRIPTION:	Request for Information for Transformation Management and Reporting Tool
CLOSING DATE:	30 October 2024
CLOSING TIME:	11:00 am
RESPONSES MUST BE EMAILED TO:	lungisilez@raf.co.za
ATTENTION:	Ms. Zondi

BIDDER NAME:

BIDDING STRUCTURE

Indicate the type of bidding structure by marking with an 'X':	
Individual bidder	
Joint venture	
Consortium	
Using subcontractors	
Other	

If individual bidder, indicate the following:	
Name of bidder	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

If joint venture or consortium, indicate the following: (To be completed for each joint venture/ consortium member)	
Name of joint venture/consortium members	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

If using subcontractors, indicate the following:	
Name of prime contractor	
Registration number	

If using subcontractors, indicate the following:	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

If joint venture or consortium, indicate the following:	
Name of prime contractor	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

If using subcontractors, indicate the following: (To be completed for each subcontractor)	
Name of subcontractor	
Registration number	
VAT registration number	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

SCOPE OF WORK:

1. BACKGROUND OF THE RAF

The Road Accident Fund (RAF) is a schedule 3A public entity established in terms of the Road Accident Fund Act, 1996 (Act No. 56 of 1996), as amended. Its mandate is the provision of compulsory social insurance cover to all users of South African roads, to rehabilitate and compensate persons injured as a result of the negligent driving of motor vehicles in a timely and caring manner, and to actively promote the safe use of our roads.

The customer base of the RAF comprises not only the South African public, but all foreigners within the borders of the country. The RAF head office is in Centurion and RAF intends to establish Customer Experience Centres (CEC) in each province in the country.

2. SPECIAL INSTRUCTION TO BIDDERS AND RFI CONDITIONS

- 2.1 The service provider must be an eligible, registered Service Provider in terms of the applicable laws of the Country and included in the National Treasury Central Supplier Database.
- 2.2 It is expected of bidders to have their Tax matters in order when the proposals are submitted.
- 2.3 Companies or Director that are included on the National Treasury register for Restricted Suppliers and/ or Tender Defaulters will be automatically disqualified from the process.
- 2.4 This RFI is only for information purposes
- 2.5 The costs of preparing the submission shall not be reimbursed.
- 2.6 The bidder to provide a comprehensive proposed tool and how it addresses all the requirements.
- 2.7 The bidder may provide previous client/s for the proposed tool or similar.
- 2.8 The bidders may provide resume of resources for project execution.
- 2.9 Also include a proposed Implementation Plan: This should include how the project will be phased and the timing thereof.
- 2.10 The bidder must provide total cost estimate of the proposed tool.
- 2.11 **Shortlisted bidders will be required to technically demonstrate to RAF on how the proposed tool meets the solution/technical requirements as contained in this RFI document. This will be delivered in a live technical demonstration of the proposed tool.**
- 2.12 Bidders are also required to complete SBD.4 Bidders Disclosure
- 2.13 For enquiries contact Supply Chain Management via e-mail address: lungisilez@raf.co.za

3.BACKGROUND OF THE PROJECT

The Road Accident Fund is in the middle of a transformation journey incorporating the implementation of a claimant centric business operating model, an integrated claims management platform, and a customer relationship management (CRM) approach offering an all-encompassing customer experience. The transformation of the Fund serves as the cornerstone in terms of its strategic outlook emanating from the 2020 – 2025 strategy and beyond.

The Strategy and Transformation division is mandated to facilitate the organisation's successful transformation by delivering strategic planning, monitoring, evaluation and reporting capabilities, enterprise project management, business and data analysis, change management, and technology and digital innovation. Critical to fulfilling the Strategy and Transformation division's obligation is centralised reporting that provides an enterprise-wide perspective, adoption of best practice principles and methodologies, process automation, companywide resource management, and data driven decisions. These must be enabled through fit for purpose digital systems and an integrated data landscape.

3.1 DETAILED SPECIFICATION:

The Strategy and Transformation division is beleaguered by manual, localised and inconsistent transformation management challenges which include, but not limited to, the following:

- a) poor transformation projects portfolio visibility and tracking,
- b) manual transformation management processes,
- c) localised management of project schedules, registers, and related artefacts,
- d) manual monitoring and reporting on annual performance plans (APPs) and annual operational plans (AOPs),
- e) inconsistent and manual reporting against transformation susceptible to data inaccuracies,
- f) manual development of project portfolio, APP, and AOP dashboards,
- g) misaligned project portfolio contributing to the risk of failed strategic objectives,
- h) lack of transformation, APP, and AOP data harvesting for analytics, trending, and data driven decisions
- i) inefficient resource management, and
- j) limited transformation collaboration

3.2. As per outlined above challenges, the project aims to identify and assess available options to mitigate these challenges affecting the Strategy and Transformation division. A viable solution option must provide the following capabilities:

- a) integrated portfolio management,

- b) centralised enterprise strategy planning, monitoring, and reporting,
- c) real-time trending, reporting, and dashboards,
- d) data insights coupled with intelligence,
- e) effective project governance,
- f) agile project delivery enablement,
- g) automated project management processes,
- h) enterprise resource management; and
- i) cloud computing capability

3.3. FUNCTIONAL REQUIREMENTS

- 1) User access and role management
- 2) Project creation and management
- 3) Task creation and management
- 4) Milestone tracking
- 5) Time tracking (logging of hours worked against activities)
- 6) Notifications and alerts
- 7) Schedule Tasks and Assign Resources
- 8) Costs and Budgets Management
- 9) Import data such as budget variances data from SAP
- 10) Systems Integrations – Share similar kind of data throughout various system to avoid inconsistency in reporting and promote quality type of reporting.
- 11) Capture Annual Performance Plans (APPs) and Annual Operational Plans (AOP)
- 12) Monitor and track APP and AOP progress status.
- 13) Report generation and exporting
 - i. APPs
 - ii. AOPs
 - iii. Projects
 - iv. Small Initiatives
 - v. Programme and portfolio
 - vi. Resource Utilisation, etc.
- 14) Publish dashboards and exporting
 - i. APPs
 - ii. AOPs
 - iii. Projects
 - iv. Small Initiatives
 - v. Programme and portfolio
 - vi. Resource Utilisation, etc.

15. Analytics and Insights

- i. APPs
- ii. AOPs
- iii. Projects
- iv. Small Initiatives
- v. Resource utilisation, etc.

16. Drill-down and Drill-through

- i. Enable detailed data exploration.

17. Trend Analysis

- i. Ability to generate trends, including time-series analysis and forecasting.

18. Comparative Analysis

- i. Ability to compare analysis across different time periods, regions, departments, or other dimensions.

19. Anomaly Detection

- i. Detect and highlight anomalies or outliers in the data.

20. Alerts and Notifications

- i. Custom alerts based on specific conditions e.g., thresholds breached, data updates.
- ii. Issuance of notifications when scheduled reports or updates are generated.

4. TECHNICAL REQUIREMENTS

1. Electronic document storage or ECM Integration Capability

- i. System generated documents
- ii. Uploaded documents (incl. metadata)
- iii. Document management capabilities

2. Integration

- i. SAP
- ii. Claims Management System
- iii. Business Intelligence (BI) Platform, inter alia

3. Security

- i. Audit logs
- ii. Access control
- iii. Data encryption

4. Data

- i. Data Source Integration
- ii. Data transformation
- iii. Scalability to handle large volumes.
- iv. Compliance with data protection and privacy regulations e.g., POPI

5. Mobility

- i. Mobile access to the platform via mobile devices such as smartphones, tablets, etc.

6. Backup and Recovery

- i. Regular backups to prevent data loss.
- ii. Disaster recovery plan to ensure business continuity in case of system failure.

5. PRICING SCHEDULE

NO	Description	Unit Price	Total Price

6. BIDDER'S DISCLOSURE

1. 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.

2. Bidder's declaration

2.1 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**

2.1.1 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

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

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2.1 If so, furnish particulars:

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2.3 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**

2.3.1 If so, furnish particulars:

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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.

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

3.6 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.

3.7 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.

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Signature _____ Date _____

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