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NOTICE TO SERVICE PROVIDERS

REQUEST FOR PROPOSAL (RFP):

TENDER NO:44/2026

SUPPLY AND IMPLEMENTATION OF CLOUD-BASED SOFTWARE SOLUTION FOR SMART DOCUMENT GENERATION AS WELL AS SUPPORT AND MAINTENANCE FOR A PERIOD OF TWO (2) YEARS

Date of Issue	07 August 2026
Closing Date:	22 September 2026
Closing Time :	11:00AM
Non-Compulsory Briefing Session	Microsoft Teams
Microsoft Teams Link	https://l1nk.dev/wd7jf9p <i>Upon clicking the meeting link, please allow a few moments to be redirected to Microsoft Teams.</i>
Briefing session Date :	03 September 2026
Briefing session Time :	10:00AM- 12:00PM
Contact Person:	Azwihangwisi Mabuda
Contact Email:	AzwihangwisiM@legal-aid.co.za

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1. DISCLAIMER

- 1.1 The information contained in this Request for Proposal (“**RFP**”) document or subsequently provided to Bidders, whether verbally or in documentary or any other form by or on behalf of Legal Aid South Africa, is provided to Bidders on the terms and conditions set out in this RFP and such other terms and conditions subject to which such information is provided. The information contained in this document is confidential in nature. The bidders shall not share this information with any other party not connected with responding to this RFP.
- 1.2 This RFP is not an agreement or an offer by Legal Aid SA to the prospective Bidders or any other person. The purpose of this RFP is to provide interested parties with information that may be useful to them in the formulation of their proposals pursuant to this RFP. Though this RFP has been prepared with sufficient care to provide all required information to the potential bidders, they may need more information than what has been provided. In such cases, the potential bidder is solely responsible to seek the information required from Legal Aid SA. Legal Aid SA reserves the right to provide such additional information at its sole discretion.
- 1.3 Legal Aid SA and its employees make no representation or warranty and shall have no liability to any person including any bidder under any law, statute, rules or regulation, principles of restitution or unjust enrichment or otherwise for any loss, damages, cost or expense which may arise from or be incurred or suffered on account of anything contained in this RFP or otherwise, including the accuracy, adequacy, correctness, reliability or completeness of the RFP and any assessment, assumption, statement or information contained therein or deemed to form part of this RFP or arising in any way in this selection process.
- 1.4 Legal Aid SA also accepts no liability of any nature whether resulting from negligence or otherwise however caused arising from reliance of any bidder upon the statements contained in this RFP.
- 1.5 Legal Aid SA may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information, assessment or assumption contained in this RFP.

- 1.6 The issue of this RFP does not imply that Legal Aid SA is bound to select a bidder or to appoint the selected bidder for the Request for Quotation herewith, Legal Aid SA reserves the right to reject all or any of the proposals without assigning any reasons whatsoever.
- 1.7 The bidder shall bear all its costs associated with or relating to the preparation and submission of its proposal including but not limited to preparation, copying, postage, delivery fees, USB and labelling, expenses associated with any demonstrations or presentations which may be required by Legal Aid SA or any other costs incurred in connection with or relating to its proposal. All such costs and expenses will remain with the bidder and Legal Aid SA shall not be liable in any manner whatsoever for the same or for any other costs or other expenses incurred by a bidder in preparation or submission of the proposal, regardless of the conduct or outcome of the selection process.

2 INTRODUCTION

- 2.1 Legal Aid South Africa (abbreviated as "Legal Aid SA") is a national public entity established by the Legal Aid South Africa Act 39 of 2014. Its aim is to render legal aid or make available legal advice, provide legal representation to people at state expense, and provide education and information concerning legal rights and obligations, as envisaged in the Constitution of the Republic of South Africa. Legal Aid SA is a high-performing organization and is certified as a Top Employer in South Africa.
- 2.2 Legal Aid SA invites qualified and reputable service providers to submit a Request for Proposal (RFP) for supply and implementation of cloud-based off-the-shelf software solution for Smart Document Generation as well as support and maintenance for a period of two (2) years. The proposed solution must integrate with the Legal Aid SA existing electronic libraries and the Legal Aid Administration system (eLAA – Nintex K2 Platform).

3 BACKGROUND

- 3.1 Legal Aid SA is currently utilizing the Hotdocs Document Generation solution to automate certain civil documents. The solution is web-based with a Microsoft SQL database backend for storage of data and documents. Once the template has been completed, the output in the form of a Word document or PDF is generated and stored in the database or file system.
- 3.2 Reference to Smart Document Generation means the ability to generate a legal document using client information captured from the legal aid application form and merging this information with information obtained via a set of relevant legal questions in the form of an interview.

4 PURPOSE

- 4.1. Legal Aid SA invites qualified and reputable service providers to submit a

Request for Proposal (RFP) for supply and implementation of cloud-based off-the-shelf software solution for Smart Document Generation as well as support and maintenance for a period of two (2) years.

- 4.2. Service providers must note that providing an integrated software solution for Smart Document Generation must be compatible with our current systems, including our case management system which is running on K2 Five platform and is integrated with SharePoint for document management.

5 SCOPE OF WORK

Functional Requirements

1. The appointed contractor shall undertake to provide Legal Aid with services, which is of a high and acceptable standard applicable, which shall include:
2. Supply and implementation of cloud-based off-the-shelf software solution for Smart Document Generation as well as support and maintenance for 470 users over a period of two (2) years.
3. Proposed solution must be able to generate a legal document using client information captured from the legal aid application form and merging this information with information obtained via a set of relevant legal questions in the form of an interview.
4. Any mandated client information must be captured and be retained for use in the generation of any further documents in the same matter, thus ensuring that information only needs to be captured once for further use in subsequent documents.
5. The information must then combine with the relevant legal precedent and must be verified against the relevant court rules and practice directives pertaining to the specific jurisdiction where that legal document will be used.
6. Legal document assembly and workflow must be regularly updated with the latest rules and legislation when promulgated.
7. Changes to the style and layout must conform with the requirements of the various courts and jurisdictions in South Africa.

8. The service provider must also convert our existing templates into the new software solution.
9. A sample of some templates are included in this proposal. We currently have 163 existing templates that will need to be converted to the proposed system.
10. The proposed solution must be customised to the needs of Legal Aid SA.
11. The supplier must have at least one person who has a recognised legal qualification in their content development team.
12. It is preferred that the development team/s that develop legal precedents and templates include specialists such as attorneys, editors, content enhancement specialists, and electronic product developers.
13. A preliminary timeline of six months/project plan must be submitted detailing development of legal templates/precedents and for the conversion of existing templates, e.g., Divorce and Administration of Estates.
14. The appointed bidder must provide a detailed project plan and scheduling for all work prior to the finalisation of the contract award.
15. The programme/software must allow for monthly updates and revision of templates when legislation is enacted, and practice directives issued, amended or when business needs require document changes.
16. The document solution must have built in analytical tools accessible to authorised staff of Legal Aid SA.
17. Proposals must cover the cost of the conversion of existing templates developed by Legal Aid SA and integration into the new platform.
18. The document solution must be capable of integrating with the Legal Aid SA with existing legal electronic libraries.
19. The Legal Aid SA matter reference number should be integrated from eLAA. Backward integration using the address on the eLAA platform is necessary.
20. The system should provide for two-way integration with the core system eLAA, with the created template being able to search for and complete fields already recorded from the eLAA system via the South African ID Number, Application Reference Number, or Instruction Number fields.

21. The created template must be securely stored in the eLAA system's SharePoint Online once it has been entirely completed against the applicant or instruction in question.
22. The document precedent bank must be capable of categorisation according to the topic in specific folders.
23. The platform must have electronic guides to assist practitioners through the process of document generation.
24. The envisaged platform should allow practitioners to use relevant answers and data from answers in each client matter to generate other documents from questionnaires instead of manually entering information each time.
25. All documents must be downloadable in Word format to allow for editing or directly into PDF format.
26. All proposals must detail the cost of document automation for both a simple document and a complex document.
 - e.g., Simple Document Notice of Appearance to Defend
 - e.g., Complex Document Divorce Particulars
27. The proposed software solution must provide options regarding the minimum of 470 users and maximum 2600 users that the platform can accommodate increasing increments of 250 users.
28. Bidders must provide details of the security and integrity of the proposed solution covering aspects below.

Data Encryption

- All sensitive user data stored in the system should be encrypted using industry-standard encryption algorithms and protocols.
- The data encryption must support both in transit and at rest data statuses.

Access Control

- The solution should implement role-based access control, allowing users to access only the functionalities and data relevant to their roles.
- The solution must provide system reports for tracking of user access and

activity logs.

Authentication and Authorization

- Solution should allow multi factor authentication (MFA) for access.

Non-Functional Requirements

- The system must be scalable to support future demands by enabling scale-up or scale-out capabilities.
- The solution must provide 99.9% uptime.
- The data centre where the proposed solution is hosted must be resident within the borders South Africa (RSA)
- Annual subscription fee must be specified if subscription based.
- Detailed costing of the user licence module used with a clear indication if the licencing is per user or concurrent users.
- Any other fees that are required, not limited to hosting, maintenance fees/warranty and/or subscription fees must be disclosed.
- The supplier is to indicate if there is any restriction on the number of documents that can be generated either monthly or annually.
- The supplier must also be able to provide online training to Legal Aid SA staff if required.

Maintenance and Support

- Technical support must be provided, comprising professionals with skills in API and SQL.
- Maintenance and updating of smart precedents when changes are made to legislation and court directives to ensure they continue to meet requirements and needs of Legal Aid SA.
- The supplier software solution should ideally have customer service and helpdesk support available between the hours of 08h00 and 17h00 and costs included under support if any.
- Maintenance and Support (Detailed information on SLAs with response times, and Cloud support).

- Indicate how disaster recovery will be managed.

6 TECHNICAL PROPOSAL ORGANISATIONAL GUIDELINES

6.1 Table 1: Technical Proposal Organisational Guidelines below contain the organisational guidelines for proposal responses.

Table 1: Technical Proposal Organisational Guidelines

No.	Document	(√) Tick applicable box				Reference Page
		Yes		No		
1.1.	Company Profile – this must also indicate company experience in similar projects, completed project list of a similar nature, technical staff complement, company organogram (to service Legal Aid SA) and existing clients in document generation					
1.2.	CV and Qualifications of Project Manager					
1.3.	CV and Qualifications/Certifications of installation technical resources. The CVs must be accompanied by valid certifications/licences where applicable					
1.4.	Project Implementation Plan: Provide an overview of the project management methodology to be applied, including the phases it encompasses, in alignment with the project methodology provided. A detailed Project Implementation Plan (including but not limited to Work Breakdown Structure (WBS), Resource Allocation and Timelines) with respect to					

No.	Document	(√)Tick applicable box				Reference Page
	operational readiness within a six (6) months' period must be provided together with a Project Risk Assessment.					
1.5.	At least two (2) signed reference letters from previous/current clients on the company's letterhead. The letter must reflect the following: - Brief description of work completed relevant to Smart Document Generation - person writing the letter - Client stamp or signature (dated) Letters must not be older than three (3) years from date of closure of the tender					
1.6.	Detailed SLA as per Section 5 (Maintenance and Support)					
1.7.	Proposed solution outlining the architecture and functionality					
1.8.	OHSA (Occupational Health and Safety) form					

7 FUNCTIONAL EVALUATION CRITERIA

7.1 Bid Evaluation Stages

7.1.1 The bid evaluation process consists of two (2) stages, according to the nature of the bid. A bidder must qualify for each stage to be eligible to proceed to the next stage of the evaluation. Failure to meet the minimum qualifying score or threshold will result in disqualification. The stages are:

Table 2: Bid Evaluation Stages

Stage	Description	Minimum Qualifying Score	Applicable for this bid YES/NO
Stage 1	Technical Proposal requirements	80 points	YES
Stage 2	Price and Historically Disadvantaged individual (HDI)	80/20	YES

7.2 Stage 1: Technical Proposal requirements

7.2.1 Qualifying bidders shall be evaluated on the technicality of their proposals as per the criteria set below. The minimum threshold for this stage of technical proposal requirements is 80 out of 100 points. Bidders who score below the minimum requirement shall not be considered for further evaluation in stage 2

Focus Area	Max Points	Criteria	Points
Company Experience	20	Company profile provided spanning more than five (5) years in the field of legal document drafting/assembly/generation	20
		Company profile provided spanning more than three (3) to five (5) years in the field of legal document drafting/assembly/generation	15
		Company profile provided spanning less than three (3) years in the field of legal document drafting/assembly/generation	10
		Company profile provided spanning less than one (1) year in the field of legal document drafting/assembly/generation	0
Written References	10	2 signed reference letters including a brief description of the project not older than three (3) years from date of closure of the tender attached	10
		1 signed reference letters including a brief description of the project not older than three (3) years from date of closure of the tender attached	5
		0 reference letters attached	0
Quality of Project Manager	10	Project Manager with requisite project management qualification and more than five (5) years' experience in implementation of legal document drafting/assembly/generation system/platform.	10

		Submit CV and relevant project management qualifications, CV should contain a brief description of each project and role and responsibilities within those projects.	
		Project Manager with requisite project management qualification and less than five (5) years' experience in implementation of legal document drafting/assembly/generation system/platform. Submit CV and relevant project management qualifications, CV should contain a brief description of each project and role and responsibilities within those projects.	5
Quality of Project Technical Team	10	More than 5 content developers with more than five (5) years' experience in the field of legal document drafting/assembly/generation including attorney editors, content enrichment specialists and electronic product developers. Submit CVs and relevant qualifications	10
		4 - 5 content developers with more than five (5) years' experience in the field of legal document drafting/ assembly/generation including attorney editors, content enrichment specialists and electronic product developers. Submit CVs and relevant qualifications	8
		2 - 3 content developers with more than five (5) years' experience in the field of legal document drafting/ assembly/generation including attorney editors, content enrichment specialists and electronic product developers. Submit CVs and relevant qualifications	6
		< 2 content developers with more than five (5) years' experience in the field of legal document drafting/ assembly/generation including attorney editors, content enrichment specialists and electronic product developers' generation. Submit CVs and relevant qualifications	2
		< 1 content developers' with less than five (5) years' experience in the field of legal document drafting/ assembly/generation including attorney editors, content enrichment specialists and electronic product developers' generation. Submit CVs and relevant qualifications	0
Project Implementation Plan	15	Project management methodology and a well-presented detailed Project Implementation Plan including the following five (5) aspects: - Project timelines with clear deliverables	15

		- Work breakdown structure - Project risk assessment - Resource allocation based on technical experience - Integration with 3rd party systems			
		Project management methodology and an average Project Implementation Plan: Plan does not address all five (5) outlined aspects	10		
		No project management methodology and Project Implementation Plan	0		
Functional Requirements	25	Solution offered considers all the key technical functionalities as required under Technical Requirements (Section 2)			
		All technical requirements met Supply, delivery, installation and maintenance of a Smart Document Generation Software with integration into electronic reference platform and eLAA.	25		
		Some technical requirements met Supply, delivery, installation and maintenance of a Smart Document Generation Software with integration into electronic reference platform and eLAA.	10		
		No technical requirements met Supply, delivery, installation and maintenance of a Smart Document Generation Software without integration into an electronic reference platform and eLAA.	0		
Support (maintenance)	5	Severity	Maximum Response Time	Maximum Resolution Time	5
		Critical (P1) Production system inaccessible/unusable for all users	<=1 Hour	<=2 hours	
		High (P2) Production system is accessible by all or some of the users:	<=2 Hours	<=8 Hours	

		however, essential functions or features are not available			
		Medium (P3) Production system is accessible by all users; however, a key function or feature is not available	<=4 Hours	<=2 Business days	
		Low (P4) Ad-hoc support request and change requests	<=8 Business Hours	<=8 Business Days	
		SLA does not comply with minimum requirements			0
Training	5	Availability of online training, customer service, and helpdesk support			5
		No online training available, customer service and helpdesk support			0

7.3 The bids that achieve 80% or more for the Functionality Evaluation will be further evaluated on Specific Goals whereby the Preference Point System of 80/20 with the maximum points as follows: Price = 80 points and 20 points are for preferential procurement requirements on Historically Disadvantaged Individuals (HDI).

7.4 Stage 2: Pricing

The pricing will be based on Specific Goals whereby the Preference Point System of 80/20 with the maximum points as follows: Price = 80 points and 20 points are for preferential procurement requirements on Historically Disadvantaged

Individuals (HDI)

Evaluation on Price and Historically Disadvantaged individual (HDI) will be calculated as per the below table;

Preferential points will be awarded in terms of the Historically Disadvantaged individual (HDI) which must be substantiated as follows **(kindly refer to form SBD 6.1 for more details and fully complete to claim the points): -**

NO	PRICE AND Historically Disadvantaged individual (HDI)	POINTS
1.	Total bid price offered (inclusive of all applicable taxes)	80
2.	Historically Disadvantaged individual (HDI)	20
	TOTAL	100

Bidders must submit a valid CSD registration or B-BBEE status level verification certificate, or a sworn affidavit confirming annual turnover and level of black ownership in case of an EME and QSE as proof to substantiate the HDI points claimed as per SBD 6.1.

Pricing Structure				
Item	Description	Quantity	Unit Amount	Total Amount
1.1.	Document automation (new)	Each		
1.2.	Conversion of existing templates	Each		
1.3.	Training of Staff (virtual)	Once-off		
1.4.	Subscription fee (if applicable)	24 months		
1.5.	Support & Maintenance fee	24 months		
1.6.	Hosting fee if any	24 months		
			Subtotal	
			VAT	
			Total	

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8 RIGHTS TO SUBMITTED MATERIAL

- 8.1 It shall be understood that all proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all reports, charts and proposals referencing information submitted in response to this RFP, shall become the property of Legal Aid SA and will not be returned. Legal Aid SA will use discretion regarding disclosure of proprietary information contained in any response but cannot guarantee information will not be made public. As a government entity, Legal Aid SA is subject to making records available for disclosure.

9 CONFIDENTIAL INFORMATION

- 9.1 Any written, printed, graphic, electronic, or magnetically recorded information furnished by Legal Aid SA for the respondent's use is the sole property of Legal Aid SA. This proprietary information includes, but is not limited to, customer requirements, customer lists, marketing information and information concerning Legal Aid SA employees, products, services, prices, operations, security measures, and subsidiaries.
- 9.2 The respondent and its employees shall keep this confidential information in the strictest confidence and will not disclose it by any means to any person except with Legal Aid SA's approval, and then only to the extent necessary to perform the work under the contract. These confidentiality obligations also apply to the respondent's employees, agents and subcontractors, and the respondent shall be liable for a breach of the confidentiality obligations by any such party. On termination of the contract, the respondent, its employees, agents, and subcontractors will promptly return any confidential information in its possession to Legal Aid SA.

10 PAYMENTS

- 10.1 No payment will be made by Legal Aid SA before a service has been fully rendered and signed off by Legal Aid SA.
- 10.2 Payment will be made within 30 days of receipt of the original or certified invoice from the supplier, provided that Legal Aid SA is satisfied with the quality and standard of the supplier's performance.

11 BID CONDITIONS

- 11.1 The following documents must be completed and returned together with the proposal:
 - a) SBD 1
 - b) SBD 3.1
 - c) SBD 4
 - d) SBD 6.1
- 11.2 The bidder must provide proof of registration on National Treasury's Central Supplier Database (CSD) which should reflect that the bidder is an active supplier, is tax compliant and is not a restricted supplier.
- 11.3 Legal Aid SA SCM Policy on preferential procurement: Specific goals will be evaluated using the Preferential Points System Evaluation: 80/20: Price = 80 points and 20 points are for preferential procurement requirements on Historically Disadvantaged Individuals (HDI).
- 11.4 Bidders are required to provide a valid B-BBEE status level verification certificate or an affidavit where preference points are claimed.
- 11.5 The proposals must be valid for a minimum period of 150 days from the date of issuing and must include VAT where applicable.
- 11.6 The full costs must be disclosed, and no variances will be entertained; and
- 11.7 The bidders must send their quotations, along with the proposal, to the addresses listed on the RFP's cover page, and other required bidding documents.

12 RFP SUBMISSION INFORMATION

- 12.1 The closing date of submission is **22 September 2026 @ 11:00 AM**.
- 12.2 All the questions or queries relating to the specifications should be forwarded in writing to contact listed on the cover page no later than the **11 September 2026**. The questions or queries should reference a specific paragraph from the RFP.
- 12.3 All enquiries must be directed to:
Azwihangwisi Mabuda
Email address: AzwihangwisiM@legal-aid.co.za
- 12.4 RFP responses should be submitted to the below address at the tender box situated at the reception and clearly marked:
- LEGAL AID HOUSE
29 De Beer Street
Braamfontein
Johannesburg
2017
- 12.5 Submissions received after the deadline will be marked as late and not accepted.**
- 12.6 Bidders must submit their bid responses as follows:
- 12.6.1 One (1) Original file inclusive of RFP Document, Technical Proposal and Pricing / Costing.
- 12.6.2 One USB inclusive of RFP Document, Technical Proposal Response and Pricing/ Costing.
- 12.7 It is the bidder's responsibility to ensure that the information on the electronic copy is the same as in the hard copies; the information in the original file must also be the same as in the copied files. To ensure that the electronic copies are not damaged, the bidder must submit the memory stick (USB) in a sealed padded envelope, which must be attached to the hard copy and clearly marked as follows: RFP Number, RFP Description, RFP Closing Date, and the bidder's name and contact details.

13 OBJECTIVE CRITERIA

- 13.1 Legal Aid SA, like any other business, relies greatly on suppliers for most services, therefore, the interaction with suppliers/contractors/consultants can

have a substantial impact on a Legal Aid SA operation. Legal Aid SA can be negatively impacted by a supplier who does not have a good reputation or has been implicated in unethical activities, by association. To mitigate this reputational risk, Legal Aid SA will investigate any negative and positive news on the supplier/contractor/consultant before doing any business and make an informed decision about association.

- 13.2 In the event a bidder is found to not satisfy / meet the conditions or requirements set under par. 13.1 above, Legal Aid shall exercise its right in awarding the bid using applicable prescripts as provided for under the PPFA (sec. 2(f), which states, *“the contract must be awarded to the tenderer who scores the highest points, unless objective criteria in addition to those contemplated in paragraphs (d) and (e) justify the award to another tenderer;”*

LEGAL AID SOUTH AFRICA RESERVES THE RIGHT NOT TO MAKE ANY APPOINTMENT AND SHALL NOT ENTERTAIN ANY CLAIM FOR COSTS THAT MAY HAVE BEEN INCURRED IN THE PREPARATION AND THE SUBMISSION OF THE PROPOSALS.

END OF THE REQUEST FOR PROPOSAL DOCUMENT

