

ANNEXURE D
BUSINESS PERFORMANCE REPORTING SYSTEM
TECHNICAL EVALUATION CRITERIA

1. EVALUATION CRITERIA

1.1 PHASE 1

Administrative Evaluation Criteria

Initial Screening Process: At this phase bidder's response are reviewed to check if bidders have responded according to CEF (SOC) Ltd RFP document.

1.2 PHASE 2

Mandatory Evaluation Criteria

No.	Mandatory	Comply	Not Comply
1.2.1	Bidder to provide proof of local hosting site.		
	Substantiate / Comments		

No.	Mandatory	Comply	Not Comply
1.2.2	Bidder must be the authorized reseller or owner of the proposed solution.		
	Provide valid letter or ownership letter		
	Substantiate / Comments		

No.	Mandatory	Comply	Not Comply
1.2.3	Bidder to provide ISO27001:2013 or ISO27017:2015 compliance certificate. Provide a valid compliance certificate		
	Substantiate / Comments		

1.3 PHASE 3

Technical Evaluation Criteria

Bidders will be evaluated according to the below technical evaluation criteria. Minimum Technical Threshold is **70%**. It must be noted that if the Bidder does not meet the **70%** minimum threshold, the bidder will be disqualified and not be evaluated further.

Minimum Technical Threshold 70%			
Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.1 Strategic Planning			
The company must have delivered similar customer installations where the system actually supports strategic planning. The requirement to show experience in the automated support of Corporate Plans and Operational Plan for complex organisations Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof that the system did support strategic planning.		Signed reference letters on a client letterhead with a brief description of work done	10%
7 or more customer installations	5		
4 to 6 customer installations	4		
3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.2 Financial performance reporting			
The company must have delivered customer installations where the system supported the reporting on financial performance. Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof of system support of financial performance reporting.		Signed reference letters on a client letterhead with a brief description of work done	10%
7 or more customer installations	5		
4 to 6 customer installations	4		
3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.3 Non-financial performance reporting			
The company must have delivered a minimum of three (3) customer installations where the system supported the reporting of operational performance, other than financial. Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof of system support of non-financial performance reporting.		Signed reference letters on a client letterhead with a brief description of work done	10%
7 or more customer installations	5		
4 to 6 customer installations	4		
3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.4 Business scorecards and the cascading thereof			
The company must have delivered a minimum of three (3) customer installations where business scorecards were created and cascaded. Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof experience with system support of business scorecards and cascading.		Signed reference letters on a client letterhead with a brief description of work done	10%
7 or more customer installations	5		
4 to 6 customer installations	4		
3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.5 Enterprise Risk Management			
A minimum of 3 customer installations are required as experience in the system support of risk management reporting through corporate scorecards, and monitoring of treatment plans. Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof for experience with system support of enterprise risk management.		Signed reference letters on a client letterhead with a brief description of work done	10%
7 or more customer installations or more	5		
4 to 6 customer installations	4		
3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.6 Governance Management			
A minimum of 3 customer installations are required as experience in the support of governance through the corporate business reporting systems Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof related experience in place.		Signed reference letters on a client letterhead with a brief description of work done	10%
7 or more customer installations or more	5		
4 to 6 customer installations	4		
3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.7 Stakeholder Management and Customer Relations Reporting			
A minimum of 3 customer installations as demonstrated experience in the system support of stakeholder issue-tracking, customer-relations, and similar business functions. Various classes of stakeholders, including the shareholder and the customers are engaged. Issues have to be tracked to conclusion and also emerging trends can inform the strategic positioning of certain offerings of the company Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof of experience with system support of stakeholder management and related activities.		Signed reference letters on a client letterhead with a brief description of work done	5%
7 or more customer installations or more	5		
4 to 6 customer installations	4		

3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.8 Human Capital Management			
A minimum of 3 customer installations are required as demonstrated experience in the system support of human capital and individual (employee) performance reporting Please provide signed reference letters on Client Letterhead with a brief description of the work done as proof of experience the system support of human capital performance.		Signed reference letters on a client letterhead with a brief description of work done	5%
7 or more customer installations or more	5		
4 to 6 customer installations	4		
3 customer installations	3		
<3 customer installations	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.9 Information Security Management			
Bidders must provide a proof of the extent to which their solution meets the security requirements 1. Cloud solution hosted in South Africa 2. Guaranteed application availability/uptime of 99.95% 3. Detection and protection against accidental or intentional data leaks and attacks. 4. Guaranteed data confidentiality 5. Encryption of files/documents at rest and during transmission. 6. Availability of data in the unlikely case of an outage and protect against material loss of data. 7. 3RD party penetration testing 8. ISO27001:2013 and ISO27017:2015 cloud security compliant		Attach proof detailing the extent to which the proposed solution meets the stipulated security requirements	15%

9. Secure authentication (AES encryption) 10. Granular access control Please provide proof of the to which solution meets security requirements			
Solution meets 10 requirements	5		
Solution meets 7 to 9 requirements	4		
Solution meets 4 to 6 requirements	3		
Solution meets 3 requirements	2		
< Solution meets less than 3 requirements	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.10 Project Methodology/approach			
The Bidder should demonstrate their methodology/strategy in designing and implementing Business performance management systems Please provide project methodology in designing and implementing business performance management system Project methodology should include the following 1. Optimized project plan indicating deliverables with timelines. 2. Breakdown of work structure showing activities & key deliverables 3. Project quality management plan 4. Project risk management plan 5. Project communication plan 6. Submit structure or composition of team showing roles and responsibilities. 7. Budget allocation for each key deliverable 8. Submit a skills transfer plan.		Please provide project methodology in designing and implementing business performance management system	10%
Project methodology meets 8 requirements	5		

Project methodology meets 4 to 7 requirements	4		
Project methodology meets 3 requirements	3		
<Project methodology meets less than 3 requirements	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.3.11 Experience of the Project Manager			
The Project Manager that will be managing the project must have a minimum of five (5) years' experience in similar service: Please provide the C.V of the project manager demonstrating requisite experience.		Provide a copy of a C.V. of the Project Manager detailing the relevant years of experience in similar service.	5%
9 years of experience and more	5		
6 to 8 years' experience	4		
5 years of experience	3		
< 5 years of experience	0		

1.4 PHASE 4 Oral Presentation and Clarification session

PROOF OF CONCEPT/SOLUTION DEMONSTRATION EVALUATION CRITERIA

Proof of concept evaluation

Bidders who met the minimum threshold of phase 3 will be further evaluated according to the below evaluation criteria. Minimum Threshold for this phase is **70%**. It must be noted that if the Bidder does not meet the **70%** minimum threshold, the bidder will be disqualified and not be evaluated further.

Minimum Threshold 70%			
Technical Information	Scoring	Proof of documents	Weighting Percentage
1.4.1 Strategic Planning Support			
Presented solution must meet the following strategic planning support functionalities. 1. Ability to incorporate scorecard and dashboard to monitor key performance indicators. 2. Must be able to define thresholds and setup alerts/warnings that create flags, notes, and e-mail notifications 3. Must be able to perform scenario analysis 4. System should have collaboration functionality, allow end users to capture comments on scorecards 5. Must be able to formulate balance scorecard and cascade to individual performance scorecards 6. Ability to create strategy maps 7. System should have functionality to open or close the system on scheduled dates for performance period 8. Ability to capture corporate planning calendar, share calendar with subsidiaries and send reminders of scheduled meetings.		Proof of concept presentation	40%
Presented solution meets 8 required functionalities	5		
Presented solution meets more than 6 to 7 required functionalities	4		

Presented solution meets 5 required functionalities	3		
< Presented solution meets less than 5 required functionalities	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.4.2 Monthly and Quarterly Performance Reporting			
Presented solution must meet a minimum of 5 Monthly and Quarterly performance reporting functionalities. 1. Ability to evaluate plans, identify performance gaps and diagnose root causes. 2. Ease of generation of monthly, quarterly, and annual performance reports. 3. Ability to draw analytics from performance information. 4. Must be able to generate audit trail reports. 5. Ability to store scorecards, KPIs, measures, initiatives and to track implementation progress for initiatives. 6. Ability to draw in transactional data and also to take individual input without compromising integrity. 7. Ability to report on financial and non-financial performance information at group level. 8. Ability to perform profitability analysis 9. Ability to drilldown to multiple levels of organization, for example Group, entity, and department. 10. Ability to capture and track budget against strategic projects. 11. Ability to track progress with implementation of initiative and comparison to expenditure on budget. 12. Ability to engage risk management processes to track strategic risks that are linked to strategic objectives. 13. Ability to draw entity-specific and consolidated reports on risks. 14. Narrative reporting capability		Proof of concept presentation	40%

Presented solution meets 14 required functionalities	5		
Presented solution meets more than 6 to 13 required functionalities	4		
Presented solution meets 5 required functionalities	3		
< Presented solution meets less than 5 required functionalities	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
1.4.3 Employee Performance Management			
Presented solution must meet a minimum of 5 employee performance management functionalities. 1. Employee performance management with automated performance evaluations, review, and approvals. 2. Automated scheduling of performance conversations and automated and trackable personal development plans. 3. The system performance management functionality should be accessible to managers and employees. 4. The system should enable the delegation of access to different users as per the cycle of performance management. 5. The system should have functionality to link and align goals of employees to Corporate & divisional Objectives. 6. System should have capability to capture and track individual development plans. 7. The system should be flexible to allow quarterly reviews. 8. The system should provide for electronic routing, completion, approval and recording of the performance plan and resulting		Proof of concept presentation	20%

rating from management to the human resources office. 9. The system should have the capability to create, monitor and maintain performance improvement plans. 10. The system should be able to monitor performance and provide progress reports for succession and career Discussion. 11. System should have the capability that allows for central submission; Reports to be drawn on organisational performance, divisional as well as individual and Link up to Training and Development records as well as to Compensation post the final appraisal			
Presented solution meets 11 required functionalities	5		
Presented solution meets more than 6 to 10 required functionalities	4		
Presented solution meets 5 required functionalities	3		
< Presented solution meets less than 5 required functionalities	0		

1.5 PHASE 5

EVALUATION CRITERIA

Bidders also will be evaluated on Price and B-BBEE

Evaluation Criteria	Final Weighted Scores
Price	80
B-BBEE - Scorecard	20
TOTAL SCORE:	100