

# Request for Proposal:

## Provision of a Fully Integrated Human Capital Management (HCM) System

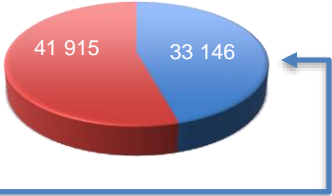

Administrative Briefing Session

09 April 2021

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- Welcome and Opening
- About the Fund
- Scope of work
- Scope of work (high level)
- Timelines
- RFP Response, Fee Structure & Evaluation
- Disqualifying criteria
- Questions

- Self Administered Defined Benefit Pension Fund
- Largest Financial Sector Conduct Authority (FSCA) regulated retirement fund in South Africa
- Active members (June 2020) → 
- Pensioners membership (June 2020) → 
- Head Office Bryanston, satellite offices Emalahleni, Durban, Bellville and East London with around 120 permanent employees;
- Core business activities are Pension Fund Administration (RFO) and Investment Management Unit (IMU) with support functions including Finance, HR, IT, Risk and Compliance and Legal and Corp Sec
- Current approximately R144 .5 Billion assets under management (June 2020)

The Human Resources team requires a fully integrated Human Capital Management System that will seek to create efficiency in Business with regards to management of the human resources practices through an integrated Human Capital Management System. The appointed service provider will be expected to continuously offer new, innovative and cost-effective updates to process that aligned to Best Practice, in line with the changing world of work and taking advantage of digital transformation.

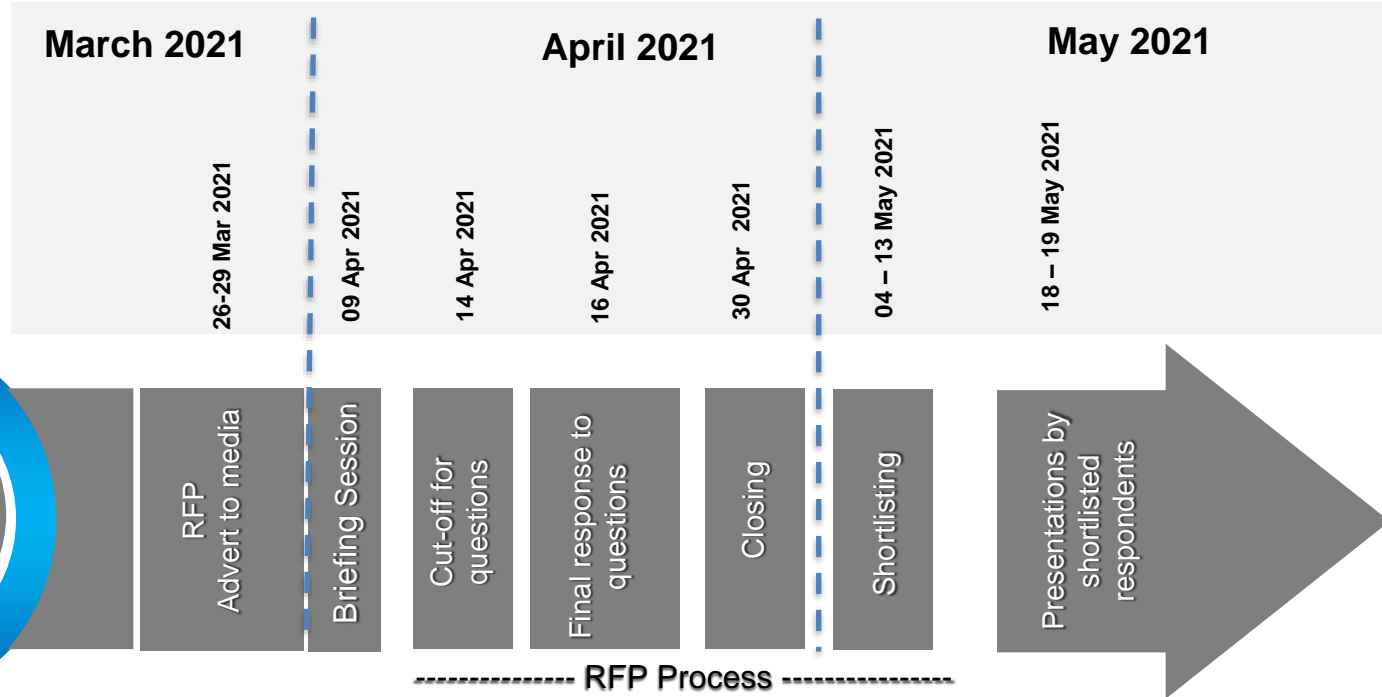
- Software Licensing (Unconditional) – 200 employees
- Human Resource Administration (Core HR Operations and Payroll), Performance management, Recruitment & Onboarding, Talent Management, Learning & Development, Employee Equity, Employee Self Service and HR Analytics & Reporting (Operational and Management reporting for all the above modules).

- Implementation (Once – Off)
- Installation of software and licences (and other, if applicable)
- Training (Once-Off)
- 10 key stakeholders
- Data Migration: to be migrated from the current HR system to the new system

# Scope of Work (High level)

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- Proposed architecture – Service providers must include the following information as part of the response:
  - Hosting Technology and Infrastructure - including diagram.
    - The solution needs to be able to support multiple deployment patterns (hosted, hybrid, on-premise and cloud)
  - Integration methodologies and technologies supported by the proposed tool - to allow the consumption of data from other systems as well as to allow pulling of data by other systems.
  - IT Security – including user access authentication/authorization capabilities
  - Data Privacy - Compliance to POPIA and Data Encryption
  - Mobile functionality (the ability to use the software on mobile devices)
  - Support & Maintenance process



**Estimated contract start date – June 2021**

The Fund will only be able to provide formal communication to bidders, once the overall evaluation and approval process has been concluded, this includes actual approval by the Procurement Committee and/ or any other relevant Board Committee/s.

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All queries must be submitted **in writing only** and responses to queries or points of clarity will be on the Fund's website. Electronic email address for queries is **[ProcurementOffice@eppf.co.za](mailto:ProcurementOffice@eppf.co.za)**

Proposals received by any other means other than communicated will not be considered and will be rendered invalid;

Respondents are to make sure that their RFP response are electronically submitted to the above-mentioned email address **by 12h00 South African time on the 30 April 2021.**



The Fund reserves the right to withdraw, at any stage of this process, amend or cancel this RFP, reject or not accept any or all proposals



- Proposals must be electronically generated and signed by the individual(s) legally authorised to bind the respondent (Signed RFP document, acceptance of terms and conditions), Contract terms and conditions to be negotiated with a successful Bidder;
- Respondents must, on the official letterhead of the company submitting the response, declare that:
  - the information provided in all documentation is true and correct; and
  - the signatory of the tender document is duly authorised to do so.
- The electronic copies of the RFP proposal and/or examples of work must be provided in Adobe Reader Portable Document Format (PDF), free of any viruses or malicious ware;

The structure of the RFP response to include;

- Executive Summary of the Proposal
- Company Background and Track Record
- Proposed team members for the project and their credentials
- Proposed Services
- Key Deliverables
- Pricing Schedule
- References (three references to be included)
- BBBEE Credentials
- Supporting Documents

- Certified copies of CIPC company registration documentation. In the case of respondents who are not companies as envisaged in the Companies Act of 2008, equivalent founding documents must be submitted;
- A valid Tax Clearance Certificate and/or PIN indicating good standing with the South African Revenue Services (SARS);
- A detailed statement of the company's B-BBEE credentials as required in the above, supported by a rating certificate from a SANAS accredited rating institution or a B-BBEE affidavit.
- Respondents must complete the EPPF POPIA Self Compliance Forms (EPPF Operator Privacy Due Diligence Form and Operator Privacy Compliance Self Assessment Form)

# Supporting Documents (Cont.)

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- Recent Audited Financial Statement of the specific entity that will be submitting the proposal. Group or any other entity's Annual Financial Statements will not be accepted. Respondents who are not required by law to have audited financial statements must include a letter signed by an authorised official confirming that the respondent is not required by law to have audited financial statements and accordingly, is unable to provide same.

The fee and costs schedule must be complete and must indicate the following;

No.	Pricing Model	Cost (ZAR) Inc VAT
1	Licensing (Unconditional)	
2	Implementation (Once-Off)	
3	Training (10 Key Stakeholders – Once Off)	
4	Support and Maintenance Costs	
5	Data Migration and Archiving	
6	Other Costs (If applicable)	
Total		

\*Notes: \*Please provide estimated escalation percentages year-on-year over a 5-year period.

Emphasis will be on (2 Stages);

Stage One	Percentage	Stage Two	Percentage
Functional Ability	55%	Presentation	40%
Pricing (including guarantee period):	20%	Software and tools demonstration	40%
BBBEE	20%	Response to questions	15%
POPIA Compliance	5%	Response to questions (POPIA Compliance)	5%
Contribution to Overall Score (100%)	40%	Contribution to Overall Score (100%)	60%

Only shortlisted respondents will be provided with detailed information for the second stage of the evaluation process.

Failure to meet the below;

- Failure to submit before the specified date and time
- Failure to comply with sections 4, 5 and 6 of the RFP Document
- Failure to submit requested supporting documentation in 6.6
- Failure to submit signed RFP document (Including RFP Acceptance of Terms & Conditions; Contract Terms and Conditions shall be discussed with the successful Bidder)
- Declaration (6.1)



# Questions?

Electronic mail address for queries is  
[ProcurementOffice@eppf.co.za](mailto:ProcurementOffice@eppf.co.za)

Deadline for submission of queries is on 14 April 2021 at  
16h00 SA Time.

Responses to queries or points of clarity will be updated on the  
EPPF Website by 16 April 2021 at 16h00 SA Time.

**Closing date for RFP submissions will be on 30 April 2021  
at 12h00 SA Time.**



# Thank You

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