



REQUEST FOR PROPOSAL
Bid Number: 2018/28

SharePoint Online and Public Website

Release Date: 2018-11-14
Closing Date: 2018-12-14

Table of Contents

| | |
|---|----|
| 1. Part 1 - Letter of Invitation | 2 |
| 2. Part 2 - Instructions | 3 |
| 2.1. Sasria | 3 |
| 2.2. Contractual commitment | 3 |
| 2.3. Confidentiality | 3 |
| 2.4. Submission Format (Returnable Schedules) | 4 |
| 2.4.1 Cover Page:..... | 4 |
| 2.4.2 Schedule 1:..... | 4 |
| 2.4.3 Schedule 2..... | 4 |
| 2.4.4 Schedule 3:..... | 4 |
| 2.4.5 Schedule 4:..... | 4 |
| 2.5. Submission of Proposals..... | 5 |
| 2.6. Queries and clarifications..... | 5 |
| 2.7. Automatic Disqualification | 5 |
| 2.8. Proposal costs | 6 |
| 2.9. Validity period | 6 |
| 2.10. Important dates..... | 6 |
| 2.11. Transformation..... | 6 |
| 3. Part 3 - RFP Requirements | 7 |
| 3.1. Background Information | 7 |
| 3.2. Scope of Work | 14 |
| 3.3. Contract Duration..... | 26 |
| 4. Part 4 - Financial Proposal..... | 27 |
| 5. Part 5: Qualification and Evaluation Criteria | 31 |
| 5.1. Evaluation of proposals..... | 31 |
| 5.2. Prequalifying Criteria..... | 31 |
| 5.3. Evaluation Criteria..... | 31 |
| 5.3.1. Level 1- Governance Verification | 31 |
| 5.3.2. Level 2- Technical Evaluation | 31 |
| 5.3.3. Level 3 – Preference Point System | 36 |
| 6. Part 6 – Required Documents | 37 |
| ANNEXURE A: NON DISCLOSURE AGREEMENT..... | 38 |
| ANNEXURE B: ACCEPTANCE OF BID CONDITIONS AND BIDDER’S DETAILS | 50 |
| ANNEXURE C: SHAREHOLDER INFORMATION | 54 |
| ANNEXURE D: BIDDER’S EXPERIENCE IN EMERGING TECHNOLOGIES..... | 55 |
| ANNEXURE E: DETAILED REQUIREMENTS | 56 |

1. Part 1 - Letter of Invitation

To the Service Provider:

Sasria SOC Limited hereby invites proposals from suitably qualified service providers to develop, implement, maintain and support a SharePoint Online and Public Website to Sasria SOC Ltd (Sasria).

A service provider will be selected under the procedures described in this Request for Proposal (RFP) document.

The RFP consists of the following documents:

- Part 1 – Letter of Invitation
- Part 2 – Instructions
- Part 3 – RFP Requirements
- Part 4 – Financial Proposal
- Part 5 – Pre-Qualification and Evaluation Criteria
- Part 6 - Required Documents
 - Confidentiality and Non-disclosure Agreement (Annexure A);
 - Acceptance of Bid Conditions (Annexure B);
 - Shareholder Information (Annexure C);
 - Invitation to Bid (SBD 1);
 - Declaration of Interest (SBD 4);
 - Preference Points Claims Form in terms of the Preferential Procurement Regulations 2017 (SBD 6.1);
 - Declaration of Bidder's Past SCM Practices (SBD 8); and
 - Certificate of Independent Bid Determination (SBD 9).

Note: Failure to provide any one of the documents required in Part 6 may lead to an immediate disqualification of the service provider from the tender process.

In submitting any information or documentation requested above or any other information that may be requested pursuant to this RFP, you are consenting to the processing by Sasria or its stakeholders of your personal information and all other personal information contained therein, as contemplated in the Protection of Personal Information Act, No.4 of 2013 and Regulations promulgated thereunder ("POPI Act"). Further, you declare that you have obtained all consents required by the POPI Act or any other law applicable. Thus, you hereby indemnify Sasria against any civil or criminal action, administrative fine or other penalty or loss that may arise as a result of the processing of any personal information that you submit.

2. Part 2 - Instructions

2.1. Sasria

Sasria SOC Ltd (Sasria) is the only short-term insurer that provides special risk cover to all individuals and businesses that own assets in South Africa, as well as government entities. This is a unique cover against risks such as civil commotion, public disorder, strikes, riots and terrorism, making South Africa one of the few countries in the world that provide this insurance, particularly at affordable premiums.

As a state-owned entity, Sasria has a legislative mandate that governs day-to-day business operations and a broader strategic mandate to make a positive contribution to transformation within the Insurance industry in South Africa. Sasria's core business is the provision of short-term insurance for riots, strikes, terrorism, civil commotion and public disorder to businesses and individuals.

The Government of the Republic of South Africa, and specifically the National Treasury through the Minister of Finance, is the sole shareholder of Sasria. As such, the company has to comply with a number of legal and regulatory requirements.

Bidders are encouraged to review Sasria's Integrated Report, available on its website, to get a better understanding of its business operation and functions.

2.2. Contractual commitment

No commitment of any kind, contractual or otherwise shall exist unless and until a formal written agreement has been executed by or on behalf of Sasria. Any notification of preferred bidder status by Sasria shall not give rise to any enforceable rights by the Bidder. Sasria may cancel this RFP any time prior to the formal written agreement being executed by or on behalf of Sasria.

Sasria reserves the right at its sole discretion, and at any time, to amend, deviate from, postpone, discontinue or terminate the transaction/procurement process without incurring any liability whatsoever to any other party.

Sasria reserves the right not to award this tender to the highest ranked or highest scoring bidder, as it needs to align its procurement practices to governance practices that are in line with its own growth path. These may include but are not limited to: driving socio-economic development objectives that are enshrined in various government policies.

2.3. Confidentiality

All bidders to this RFP will be required to sign the confidentiality and non-disclosure agreement outlined on Annexure A in this document.

2.4. Submission Format (Returnable Schedules)

Bidders are required to submit a comprehensively detailed bid responses in accordance with the submission format specified below (each schedule must be clearly marked):

2.4.1 Cover Page:

- The cover page must clearly indicate the Bid Number, Bid Description and the Bidder's Name.

2.4.2 Schedule 1:

- Executive Summary (explaining how you understand the requirements of this RFP, summary of your proposed solution and the summary of your experience relevant to the requirements of this RFP)
- Annexure B of this RFP document (See Part 6) (duly completed and signed)

2.4.3 Schedule 2

- All documents (except Annexure B) listed on Part 6 of this RFP Document (duly completed and signed);
- Original and valid Tax Clearance Certificate(s) (TCC);
- Valid Certificate of Incorporation i.e. CIPC company registration documents.
- Valid B-BBEE verification certificate indicating the contribution level of the bidding entity. An Exempted Micro Enterprises (EME) with an annual turnover less than R10 million, is only required to obtain a sworn affidavit confirming the annual total revenue and level of black ownership. A Qualifying Small Enterprise (QSE) that has 51% or more black beneficiaries may obtain a sworn affidavit confirming the annual total revenue and level of black ownership.

Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).

- Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable).

2.4.4 Schedule 3:

- Technical Proposal in line with the Technical Evaluation Criteria in Part 5 of this RFP document.

2.4.5 Schedule 4:

- Financial/ Price Proposal in line with Part 4 of this RFP document

Note: Bidders are requested to submit 1 original copy and 1 hardcopy of their printed proposals and one electronic copy on portable media. The document text size must be in minimum 11- point font. The printed bid/proposal must not exceed 150 (one hundred and fifty) A4 pages (including front page, table of contents, main proposal, reference pages, annexures and excluding completed SBD forms).

2.5. Submission of Proposals

- The closing date for the submission of proposals is **14 December 2018 at 12h00**. Duly completed proposals must be sealed in an envelope that is endorsed with the words “**RFP2018/28 “SharePoint Online and Public Website”**”. The envelope must be handed in at the Sasria reception desk located at:

Physical address

Sasria SOC Limited
36 Fricker Road
Illovo
Sandton
2196

- A receipt will be issued for all bid envelopes received.
- Late or incomplete tender proposals will not be accepted or considered and any proposal delivered to any address other than the address mentioned above will not be accepted.
- E-mailed, posted or faxed proposals will NOT be accepted.

2.6. Queries and clarifications

Any additional information required which is not clarified in the specifications must be addressed in writing to (Procurement@sasria.co.za) by **30 November 2018**. Additional information may be provided at Sasria’s discretion, who reserves the right to provide the same information to all other interested parties, should this enhance the submission.

Sasria reserves the right to request meetings with Bidders to clarify responses or seek additional information to refine assessments.

Sasria reserves the right to conduct supplier due diligence prior to final award or any time during the contract period. This may include site visits and requests for additional information.

2.7. Automatic Disqualification

If ever it is found that the bidder or person(s) acting on behalf of the bidder has, in the RFP or during the whole process of evaluation, selection, etc.:

- Misrepresented or altered material information in whatever way or manner;

- Promised, offered or made gifts, benefits to any Sasria employee;
- Canvassed, lobbied in order to gain unfair advantage;
- Committed fraudulent acts; and
- Acted dishonestly and/or in bad faith.

Such bidder and/or person(s) may automatically be disqualified from further participation in this process.

Any attempts by the bidders to directly or indirectly canvas any member of Sasria's personnel for support may result in disqualification of their bid/proposal.

2.8. Proposal costs

All costs and expenses incurred by the bidder relating to their participation in, and preparation of this proposal process shall be borne by the bidder exclusively.

2.9. Validity period

The proposals should remain valid for at least 90 days after the closing date.

2.10. Important dates

| | |
|--|------------------|
| Release of RFP | 14 November 2018 |
| Last day of queries | 30 November 2018 |
| Responses to queries | 05 December 2018 |
| Closing date for submission of proposals | 14 December 2018 |

Sasria reserves the right to amend any date specified above. Any changes will be communicated to the interested parties.

2.11. Transformation

Sasria promotes transformation within the financial services sector of the South African economy and as such, bidders are encouraged to partner with majority black owned entities (51% black owned and controlled). Such partnerships may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this tender would be undertaken by black owned entities. To give effect to this requirement, bidders are required to submit a partnership / subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring.

3. Part 3 - RFP Requirements

3.1. Background Information

Sasria is a state owned company incorporated in 1979 following the June 1976 student riots. The organisation functions through a network of Agent Companies that sell Sasria products.

With the exception of a conversion in 1989 allowing Sasria to extend its perils to include damage to property by non-political risk, the business model and product offering has not significantly changed over the years despite advancements within the financial services sector. Our organisation has also not made significant changes relating to products, technology and processes. Because of this, efficiency remains compromised and impacting customer experience.

In 2017, the organisation embarked on the Enterprise Architecture Framework development project, which analysed the capabilities and gaps from the business, information, applications and technology architectures.

This Request for Proposal (RFP) has been issued to solicit proposals from relevant service providers to replace Sasria's current Intranet and company Website to the latest version of Microsoft SharePoint and develop a new modern, innovative and efficient Intranet and Website. Providing a personalised digital experience to our staff and customers in order to drive productivity, improve collaboration. To provide a seamless mobile experience across any device.

Sasria has embarked on a digital transformational strategy with the overall purpose of introducing new innovative technologies into the company. As part of the strategy, the Intranet and Website currently in use have been earmarked to be redesigned using the latest technologies to create a modern and innovative digital workspace.

The successful service provider will be responsible for designing, developing, supporting and installing the Intranet and Website solution that best meets the requirements as set forth in this RFP.

Sasria aims to commission a state of the art system that will enable the organisation to fulfil its legislative mandate and provide financial peace of mind to its clients. The objective for the new this system is to improve customer experience and seamless management of our operations.

SharePoint (Intranet)

Sasria has an existing Microsoft SharePoint 2010 on premise Intranet called "Ulwazi". Ulwazi has been in use for a number of years with some custom developments made to best fit user and departmental requirements. Ulwazi has become a critical business tool and has empowered staff to collaborate, communicate, access and disseminate information across the organisation.

The overall objective is to implement a responsive design SharePoint online Intranet, taking full advantage of new functionalities that the latest version that SharePoint Online and Office 365 provides and leveraging these to enhance the current look and feel and functionality of the Intranet. The proposed Intranet solution must include the migration of the current content and include features as described in the RFP requirements.

Website

Sasria current Website (www.sasria.co.za) is a hosted site used primarily to improve customer stakeholder experience and deliver quality content. The proposed Website must be responsive to meet the needs of our stakeholders and customers accessing the site on a variety of devices, including tablets and mobile phones. The design should be a clean visual design incorporating Sasria's branding and corporate identity. The current site requires a navigation re-design and the migration of the current content from the existing Website into a more structured approach. Increasing traffic to the Sasria Website and improving ranking placement.

Sasria's customer web portal (CWP) is a subset accessible from Sasria's website. This tool provide access to needed services for authorized parties i.e. NMI and brokers. This web portal is built on SharePoint 2013 and utilises Nintex licensing and workflow.

A central content management system (CMS) must be included with the ability to manage the Intranet and Website content.

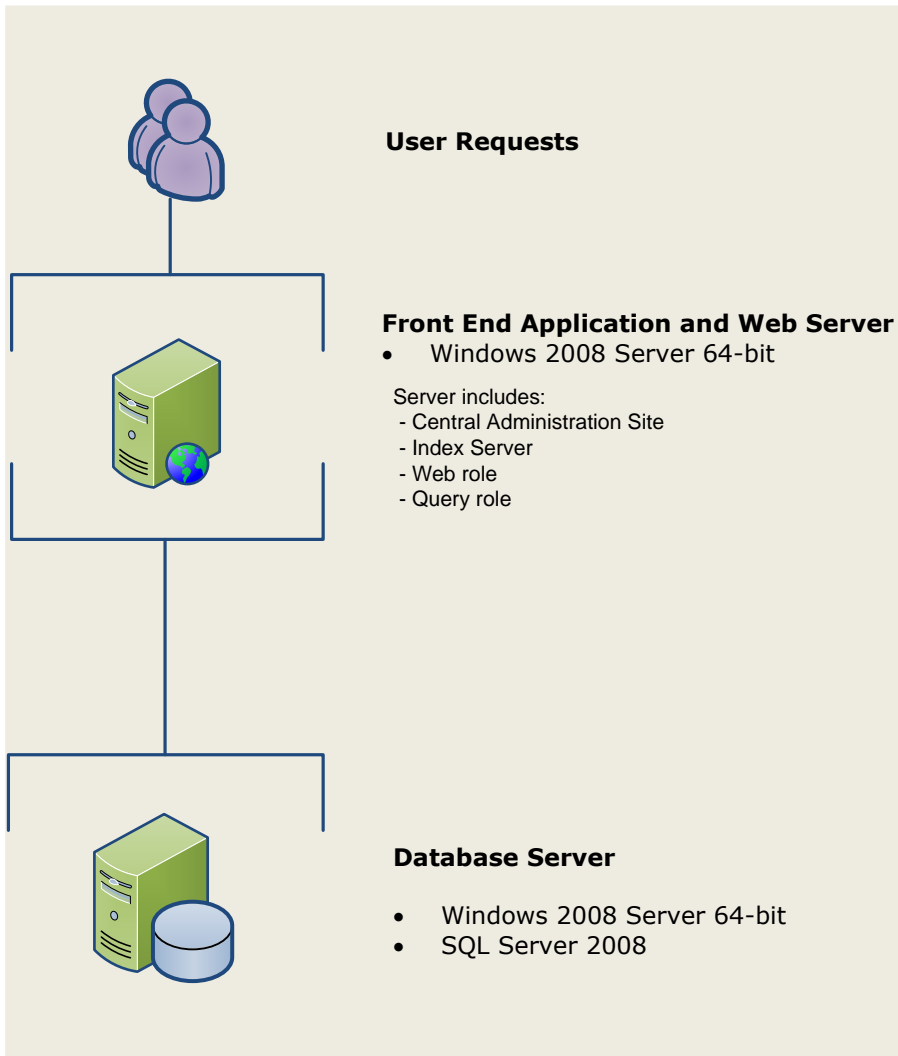
Current SharePoint Intranet Environment

Technical Infrastructure

Sasria current Intranet is an on premise solution based on the SharePoint 2010 platform. Sasria's server infrastructure is virtualised using Hyper V technology on HP hardware on clustered servers for high availability. Hyper V hosts are connected via fibre channel to a SAN storage solution.

The SharePoint environment consist of the following servers and databases

| | |
|------------------------------------|-----------------------|
| Front end application & web server | Windows Server 2008R2 |
| Database server | SQL 2008 |



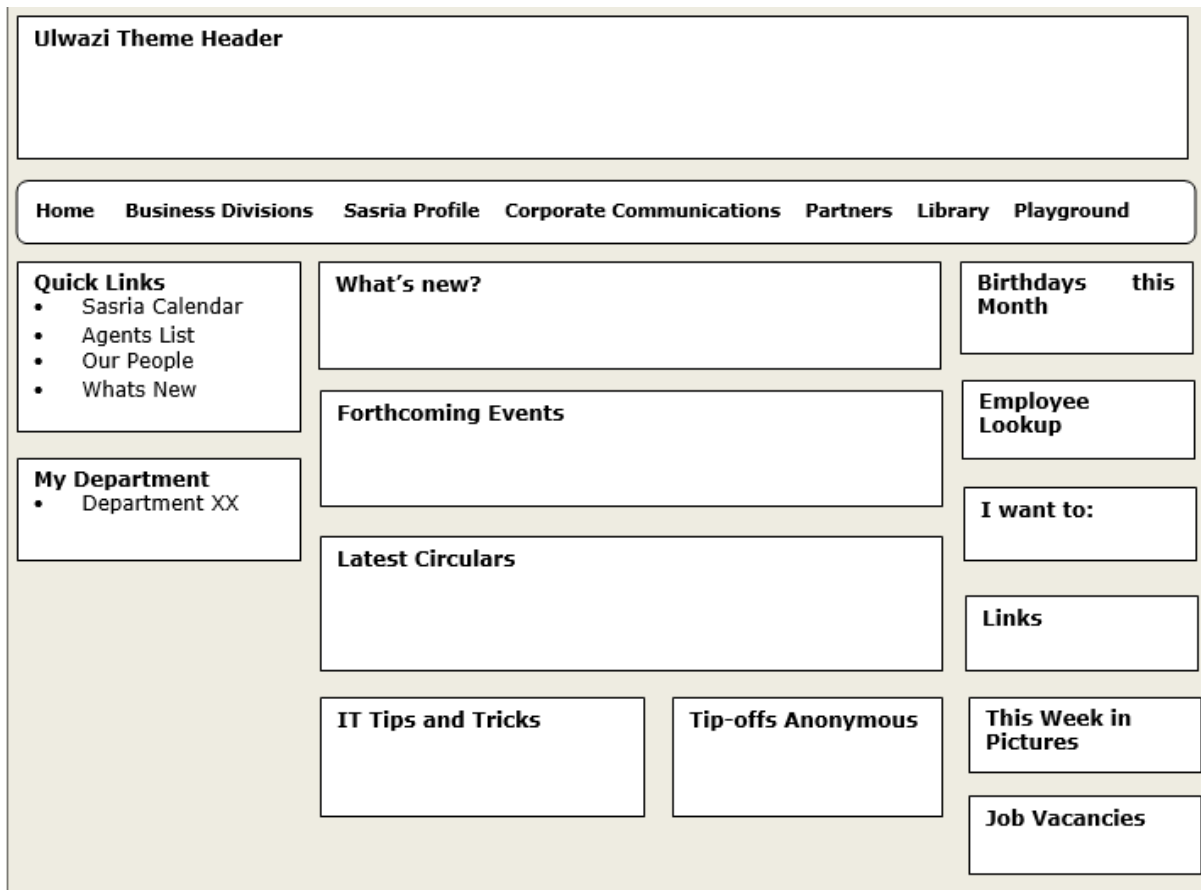
- The content database is approximately 90GB
- There are currently 110 users on the Ulwazi Intranet

Software Licensing

Sasria has recently purchased 130 Office 365 E5 licenses and is in the process of deploying Office 365 in the organisation.

Ulwazi Intranet Home Page Logical View

The wire frame below represents a logical view of the current Ulwazi home page. A brief outline of the components is described below



1. Top Level Navigation

The navigation from Business Divisions goes two levels deep.

2. Home

Takes the user back to the Ulwazi home page

3. Business Divisions

Opens the navigation to the business divisions and below that the departments under each division.

4. Sasria Profile

Opens the navigation to useful information about Sasria. Items listed here are the Vision, Mission and Values statement, List of Board Members, Committees and Annual Reports.

5. Corporate Communications

Opens the navigation to marketing related information like Advert Campaigns, Audio-Visual Clips, Circulars and Press Releases.

6. Partners

Any interesting or relevant information regarding partners can be published and viewed here.

7. Library

The Library lists information that is rolled-up from across all sites. Content Types are used to do this. The types of information listed here are Forms and Templates, Policies and Procedures and User Guides.

8. Playground

The Playground is currently only used to publish classified advertisements. It can be expanded to host bulletin boards etc.

9. Lists

Sasria Calendar

Clicking on this link opens the Sasria Corporate Calendar.

Agents List

A list of all agents with their contact details. This list is maintained on the Claims and Training site.

What's New?

A list of all "What's New" announcements. The latest active announcements are also displayed under "What's New" in the middle section of the screen.

10. My Department

My Department is a navigation item that has been configured to show all sites that the logged-in user has access to. This has been set up in the site navigation and the sites listed is based on the audience that has been defined on the link to each site.

11. What's New

Area to publish news and announcements.

12. Forthcoming Events

This is a view of the Sasria Corporate Calendar. Any current or upcoming events will be displayed in this section. To view the whole calendar click on the Sasria Calendar link under lists.

13. Latest Circulars

This is a view of the last 5 circulars that have been uploaded to the Underwriting and Support site into the library Circulars and Communiques. A Content Query web part is used to roll up the information.

14. IT Tips and Tricks

This is a view of announcements that have been published on the IT site into the IT Tips and Tricks announcements. A Content Query web part is used to roll up the information.

15. Tip-Offs Anonymous

An image web part is used to display the Tip-offs Anonymous information

16. Birthdays This Month

This web part queries the staff birthday list hosted and maintained on the Marketing Department site, and displays the names and dates of the personnel whose birthdays occur in the current month.

A Content Query web part is used to extract and display the information.

17. Employee Lookup

This is a standard SharePoint web part which can be used to search for and find colleagues.

18. Links

Standard SharePoint web part that can be used to list links that are used on a daily basis.

19. This Week in Pictures

This web part displays pictures from a picture library. The contents of the picture library will be maintained by the Marketing department.

20. Job Vacancies

- This area is used to display a list of job vacancies. Job Vacancies on the HR site are queried and listed here. A Content Query web part is used to extract and display the information.

Access Control

Permission Levels

- Design Can view, add, update, delete, approve, and customize.
- Manage Hierarchy Can create sites and edit pages, list items, and documents
- Approve Can edit and approve pages, list items, and documents
- Contribute Can view, add and update
- Read Can View Only
- Full Control Full Control
- Delete Can Delete

Groups

- SharePoint users must be assigned to one or more of the above permission levels. The users are assigned to SharePoint groups which will then be assigned permission levels per object. Active Directory user groups is used to enable a single point of maintenance for the user groups
- The following table describes the permissions that are set for access to the Portal home page. Unless site permissions are explicitly set, all users will receive the following permissions.

| Access to the PORTAL Home Page | | |
|---------------------------------------|---|-------------------|
| Role/Group | Description | Permission |
| Ulwazi Members | This group represents all Sasria users with contribute permissions to the SharePoint site | Contribute |
| Ulwazi Owners | Use this group to give people full control permissions to the SharePoint site | Full Control |
| Ulwazi Visitors | Use this group to give people read permissions to the SharePoint site. | Read |
| Ulwazi Designers | Members of this group can edit lists, document libraries, and pages in the site. | Design |
| Ulwazi Hierarchy Managers | Members of this group can create and edit sites, lists, list items, and documents. | Hierarchy Manager |
| All other Groups | | Read |

The following site specific groups are created for site in the portal. User permissions inherit from the top level site but these site level groups can be used for granular access to specific sites when inheritance is not wanted.

| Site Specific Groups | | |
|-----------------------------|---|-------------------|
| Role/Group | Description | Permission |
| Site x Owners | Use this group if there are site specific users that need full control to the site. Use this only in exceptional circumstances because the creation of permissions and customisations should be centralised | Full Control |

| Site Specific Groups | | |
|-----------------------------|---|-------------------|
| Role/Group | Description | Permission |
| Site x Members | Use this group to assign the users who need contribute access to the site. This is typically the members of the sites directorate | Contribute |
| Site x Visitors | Use this group to assign Read Only access to the site. The users in this group would typically be users from other directorates (i.e. not the function's directorate) | View Only |
| Site x Approvers | Use this group to assign approval rights to members for this specific site | Approver |

3.2. Scope of Work

The overall objective is to implement a dynamic and responsive SharePoint Online (Intranet and Website), taking full advantage of new functionalities that SharePoint provides and leveraging these to enhance the current look and functionality of the Intranet and Website. The proposed Intranet and Website solution must include the migration of the current data content and include features as described in the requirements.

3.2.1 SharePoint Online Scope of Work & Requirements

The scope of work defines the deliverables to be provided by the Bidder. Workshops and analysis will need to be conducted to ensure that the requirements are properly documented before design and deployment.

The new SharePoint Online will aim to provide a modern, structured and efficient Intranet to improve internal communications and access to information, the following requirements have been identified:

| Requirement | Requirement Description |
|--|--|
| General Requirements | |
| Provide a user-friendly interface | The interface used must be user-friendly for users, editors and administrators. Regular users of Microsoft Office applications must be able recognise terminology and symbols. |
| Personalization | The ability to personalized, content based on job role, job type, personal and professional interests. Provide users with a personalised contextual experience. |

| | |
|--|--|
| Make use of Sasria's corporate identity | The new Intranet should have a clean and modern look associated with Sasria's corporate identity. |
| Collaboration | Enhancing communication and collaboration within the organisation; The solution should integrate into Microsoft Outlook/ Teams for communication and collaboration purposes. |
| Support mobility | The Intranet design should be created with responsive capability to allow users too safely and securely access the Intranet from any supported mobile devices and deliver the same personalized experience. |
| Support multimedia content | The Intranet should include support for multimedia content. |
| Embed external videos | The Intranet should allow users to embed videos in articles from external sources such as You Tube. |
| On boarding site | The ability to create an on-boarding site for new staff members. |
| Project sites & collaboration | The ability to create project and collaboration sites. Enhancing communication & collaboration within the organisation. |
| Departmental site templates | Standard departmental site templates. |
| eLearning site | E-learning site to include documents and multimedia content. |
| Integration | The solution must integrate into the Enterprise Resource Planning, Office 365 and other systems. |
| Assessments | The solution must allow users to take assessments, get results and redo assessments if failed. |
| People search | The ability to find colleagues and information. The content may include employee Name, Department, Reporting Manager, Ext No and clickable Email Address. |
| Workflow Management Requirements | |
| Create workflows | The solution should allow authorised resources to create workflows such as automation of paper-based processes. |
| Route a document or any other item for approval | Documents (or any items) that require approval should be routed to the correct people who will review and make a decision on whether to approve or reject the document (or item). |
| Collect feedback | Documents (or any items) that require feedback should be routed to the correct people who will provide their feedback. Feedback will be collected from all the participants and feedback will be forwarded to the owner. |
| Automate approval of documents | The Intranet solution should provide document reviews and approval workflows for documents needing to pass through several authors (collaborators), reviewers and approvers before being ready for general distribution. The |

| | |
|--|---|
| | review process can be triggered directly from Microsoft Office applications. |
| Route a document or any other item for digital signatures | Documents (or any items) that require signatures should be routed to the correct people for their digital signatures. |
| Create staging and collaboration areas | Enable the user to quickly create staging and collaboration areas for documents as they are being worked on. |
| Security & Access Control Requirements | |
| Use of single sign-on | Users should be automatically identified as soon as they have logged into Windows. Users can access the Intranet without having to re-enter their Windows login credentials. |
| Manage access rights | Departments to define access rights and these access rights can only be edited by the SharePoint Administrator with permission from respective departments. |
| Define user groups | Role-based access control authentication which defines what content and functionality different user groups have access to. |
| Access Report | Report on users and what they have access to. |
| Audit trail | <p>The Intranet should keep track of all changes made to the data & metadata and be able to track which users and actions taken on the site.</p> <p>Audit trails must be created for all user actions that are performed. The following information must be recorded in the audit log:</p> <ul style="list-style-type: none"> • Username • Date and time of action • Field name • Before value • After value • Effective date • Source (Direct/Web/Mobile App) |
| Data loss prevention (DLP) & Compliance | Implement rules and policies to secure sensitive data stored in SharePoint. |
| Information Rights Management (IRM) | Protect all files types in a list or library. File encryption required on files in lists and document libraries. |
| Integration into Microsoft Active Directory | The solution should integrate into Microsoft Active Directory for managing users |
| Graphic Design and Layout Requirements | |
| Propose graphic design | <p>The branding should have a clean modern look associated with Sasria's corporate identity.</p> <p>Note: Graphic design and layout will be finalized with the appointed service provider during workshops with Sasria</p> |

| | |
|--|--|
| Provide responsive design | The Intranet design needs to be created with responsive capability to allow users to access the site from mobile devices. |
| Navigation | Navigation menu to facilitate easy of navigation. Users must be able to easily access the content and site required. |
| Rotating banners | The home page should be able rotate banners using images based on important company notifications, announcements, showcases and news. A user should be able to get more information after clicking on the image. |
| Social media | Display the latest feeds from Sasria's social media accounts. |
| Corporate calendar | A corporate calendar to display upcoming events. |
| Document library | A document library to be accessible to all users to include; <ul style="list-style-type: none"> • Policies • Procedures • Templates • Process diagrams • User Guides |
| Corporate Key Performance Indicator (KPI) dashboard | Corporate KPI dashboard to display company KPI's and status. |
| Search Requirements | |
| Provide search functionality | Provide a search functionality that can search for text, media files and other information at the same time. The search capability must be able to search the metadata associated with the document as well as the actual content of the document. |
| Chat bot & Artificial Intelligence (AI) | Development of a SharePoint Chat bot to extend the search capability |
| Provide predictive search | Predict searches when a user starts typing in the search field by automatically suggesting relevant text from what the user inputted. |
| Keep the last few searches | Search should provide the user with their last few searches. |
| Show most used search terms | Search should provide the user with mostly searched terms. |
| Filter search results based on access schema | Users should only be able to search for content on the content they have read access to. |
| • Document/Records Management Requirements | |
| Records Management Module | Full life cycle document management and records management solution for the entire enterprise. |
| Implementing e File Plan | The properties (metadata) (e.g. categories, disposition codes, vital record information, etc.) for the file plan are |

| | |
|--|---|
| | customisable for Sasria. Documents are organised in customisable hierarchical and visual business taxonomy. The auto classification engine classifies documents based on corporate rules. |
| File Plan component selection | Records can be retrieved by searching on any of the defined metadata fields defined as part of the file plan or the records. A file plan may include a number of different types of records each with their own defined metadata. |
| Document Imaging Capability | The system can accept images in any format. Images are imported into SharePoint in any of the mainstream imaging contribution components (Scanners, Facsimiles, Applications, etc.). Once the images are stored, the images are indexed (Optical Character Recognition) to ensure that a full text search can be performed to retrieve the image at a later stage. |
| Disposition Processing | The disposition process is performed by a predefined workflow process that is automatically triggered on the day the disposition instruction needs to be performed. The instructions issued by the workflow are then performed by the authorised users only. Some of the workflow actions may include the cutting off of records, transferring records, destroying records, access review, etc. |
| Create documents | The ability for users to capture a document/record for all defined functions and activities within a system manually. |
| Auto assign metadata to records and files | Automatically assign appropriate classification metadata to records and files and to classes within the classification scheme at the point of creation and capture when using templates. |
| Capture metadata elements | Enable capturing of all metadata elements specified during the system design process, and retain them with the record in a tightly bound relationship. |
| Associate records | Ensure that records are associated with a classification scheme, and are associated with one or more electronic files. |
| Define security classifications | Enable the user to define the security classification on the records, i.e. Top Secret, Secret, Confidential, Vital and Public. This classification can be changed by the record owner or administrator. |
| Capture different types of documents | Provide the ability to capture a variety of different types of documents. These must include records from on-line transaction processing systems (OLTP), databases, scanned documents, the most commonly used office documents and e-mail messages. |

| | |
|--|---|
| Control classification schemes | Provide authorisation to reclassify, add, delete or otherwise modify the classification scheme is carefully controlled and monitored. |
| Provide version control | Provide version control for storing, tracking and restoring items in a document library whenever an item changes. Checking-in and checking-out of documents should also be made available for efficient versioning control. Ability to compare the versions. |
| Set rules for content retention | Rules that define eligibility of documents or any other items in terms of storage in a particular location must be defined. If the content is not eligible to be stored in a certain location for a specified period of time, the content must be marked for deletion or transferred to another location. |
| Archive records | All archives must be stored in an archives repository. |
| Content Migration | |
| Content migration | Migrating of existing documents and content to the new Intranet <ul style="list-style-type: none"> • Library on the home page contains a document library that is rolled up from across departmental sites that is public content • Migration of e-learning site with multimedia content • The content database size is approximately 90GB • Migration of existing lists • Migration of existing InfoPath forms and workflow |
| Analysis | Service provider will need to carry out a comprehensive analysis of requirements and compile a Business Requirements and Functional Specification document. |
| E Learning | Service provider will be required to cater for eLearning facilitating multi-media on SharePoint online platform |

3.2.2 Public Website Scope of Work & Requirements

| Requirement | Requirement Description |
|--|---|
| General Requirements | |
| Content Management System (CMS) | Provide an integrated CMS to be used for the Website to publish content |
| Make use of Sasria's corporate identity | The Website should have a clean and modern look associated with Sasria's corporate identity. |
| Support mobility | The Website design should be created with responsive capability to allow users too safely and securely access the Website from any supported mobile devices and deliver the same personalized experience. |
| Support multimedia content | The Website should include support for multimedia content. |

| | |
|---|---|
| Navigation | The solution must provide navigation that is clear, structured and intuitive. |
| On-site Search Engine Optimisation (SEO) | The solution must be able to track keyword phrases that communicate the concepts on the Website to search engines. This will allow search engines to produce more relevant results for searchers. |
| Off-site Search Engine Optimisation | The solution must track links to the Website, either through outside engagement or guest articles in other publications. |
| Showcase social media news | The solution must be able to display content from social media. |
| Use analytics | The website must provide a solution to enable track the number of people who are actually clicking on the links or any other social media links. |
| Publish information from the Intranet | The solution must be able to receive and publish content from Sasria's Intranet. |
| Provide links | The solution must provide users with relevant links to click their way from page to page or from Website to Website. |
| Integration | The solution must integrate into the Enterprise Resource Planning, Office 365 and Share Point document management system and other system. |
| Security | The Website needs to adhere to strict security measures |
| Manage access rights | Access rights based on user account created across Portals |
| Define user groups | Access control authentication which defines what content and functionality different user groups have access to. |
| Access Report | Report on users and what they have access to. |
| Audit trail | <p>The website should keep track of all changes made to the data & metadata and be able to track which users and actions taken on the site.</p> <p>Audit trails must be created for all user actions that are performed. The following information must be recorded in the audit log:</p> <ul style="list-style-type: none"> • Username • Date and time of action • Field name |

| | |
|--|--|
| | <ul style="list-style-type: none"> • Before value • After value • Effective date • Source (Direct/Web/Mobile App) |
| Ease of Use | The solution must have an end-to-end platform that will redirect the user to a more secure environment without the user being aware. |
| Graphic Design and Layout Requirements | |
| Integrate into the Enterprise Resource Planning (ERP) | The solution must integrate into the ERP system for Human Capital and Procurement process. |
| Integrate into the Insurance Management System | The solution must integrate into the Insurance Management System for claim information. |
| Integrate into Governance. Risk and Compliance (GRC) tool | The solution must integrate into the GRC tool for management of complaints, compliments and queries. There solution must have a separate tab for Contact Us (Complaints, Compliments and Queries.) |
| Unique views | The solution should have unique views for different users. |
| e-Recruit Portal (potential candidates) | <p>The solution must provide an e-recruit portal for recruitment. Potential candidates should be able to do the following:</p> <ul style="list-style-type: none"> - Register for e-recruit - Capture details - Update details - Upload documents - Download documents - Receive communication - View application status <p>Potential candidates should be pre-qualified when applying for vacancies. If the candidate does not meet the requirements, the candidate must immediately be disqualified.</p> |
| e-Recruit Portal (recruitment agencies) | <p>The portal should cater for recruitment agencies. Recruitment Agencies should be able to do the following:</p> <ul style="list-style-type: none"> - Register for e-recruit - Capture details (recruitment agency and candidates) - Update details - Upload documents |

| | |
|--|--|
| | <ul style="list-style-type: none"> - Download documents - Receive communication - View application status <p>The solution should be able to track recruitment agency performance and how often Sasria uses a recruitment agency.</p> |
| Supplier management | <p>With integration to ERP, the solution must allow service providers to do the following:</p> <ul style="list-style-type: none"> - Register for bids - Capture their details - Update details - Submit quotes/proposals for bids - Upload documents - Download documents - Receive communication - View quote/proposal status |
| Claim submissions | <p>Stakeholders (individual customers and agent companies) must be able to submit claims on the extranet.</p> |
| Submission of documents/information | <p>The solution must be able to receive documents/information (such as Business Continuity Plans, Annexures, External Audit Certificates, Invoices, Quarterly and Yearly Calculations, Reports) from external stakeholders such as agent companies, individual customers and brokers.</p> |
| Rates calculator | <p>The solution must provide rates calculator that will be linked to the Insurance Management System for accurate premiums and discounts with version control. Different versions to be made available.</p> |
| Rates schedule | <p>The solution must provide rates schedule that will be linked to the Insurance Management System for accurate premiums and discounts with version control. Different versions to be made available.</p> |
| Storage capacity | <p>The solution must cater for large volumes of files.</p> |
| Send automated communication | <p>The solution must be able to send automated communication to customers, Agent Companies, service providers and internal users. The communication will be triggered by the event that occurred on the system.</p> |
| Separate tabs | <p>The solution must provide different tabs for different functions, i.e. there must be separate tabs for Claims,</p> |

| | |
|--|---|
| | Customer Relationship Management, Service Providers, Customers and Agent Companies. |
| Categorize documents | Documents must be categorized accordingly on submission. |
| Send automated status communication | The solution must send automated communication to customers, Agent Companies and service providers (where applicable) when the request status changes. |
| Send automated reminders/alerts | The system must automatically send reminders/alerts to all relevant stakeholders if a particular item has not been actioned according to the SLA. |
| Frequently Asked Questions (FAQs) | The solution must provide users with FAQs relevant to a particular section. |
| Provide mobile App functionality | The solution must provide for mobility. Users should be able to access extranet using any mobile device. |
| Applications | The solution should allow users to apply for different things such as PAIA applications, RSVPs for training. The information captured should be sent to the relevant resources/systems internally. |
| Propose graphic design | The branding should have a clean modern look associated with Sasria's corporate identity. Note: Graphic design and layout will be finalized with the appointed service provider during workshops with Sasria |
| Provide responsive design | The Website design needs to be created with responsive capability to allow users to access the site from mobile devices. |
| Navigation | Navigation menu to facilitate easy of navigation. Users must be able to easily access the content and site required |
| Rotating banners | The home page should be able rotate banners using images based on important company notifications, announcements, showcases and news. A user should be able to get more information after clicking on the image. |
| Corporate calendar | A calendar to display upcoming events. |
| Search Requirements | |
| Provide search functionality | Provide a search functionality that can search for text, media files and other information at the same time. The search capability must be able to search the metadata associated with the content as well as the actual content of the document. |

| | |
|------------------------------------|---|
| Chat bot & AI | Development of a Chat bot to extend the search capability and customer service capability. Each Portals to have own specialised Chat bot AI. |
| Provide predictive search | Predict searches when a user starts typing in the search field by automatically suggesting relevant text from what the user inputted. |
| Show most used search terms | Search should provide the user with mostly searched terms. |
| Content Migration | |
| Content migration | Migrating of existing documents and content to the new Website |
| Analysis | Service provider will need to carry out a comprehensive analysis of requirements and compile a Business Requirements and Functional Specification document. |

Note: Bidders **must** provide detailed proposals, including full details on how their proposal/ will address specific functional technical requirements specified in this RFP document. Bidder must complete the table above and submit it as part of the bid response, where additional information is provided/ attached somewhere else; such information must be clearly referenced.

3.2.3 Project Management

The successful bidder will work in conjunction with Sasria's Project Manager to manage timelines and internal resources. Sasria has adopted the Prince 2 methodology.

3.2.4 Implementation Plan

The proposal must include an implementation plan of the proposed solution. This should include how the project will be phased and include timing.

3.2.5 Documentation & Training

The bidder must provide system and end user documentation manuals/user guides and role based training to ensure the effective use of the Intranet and how change management will be addressed. The proposal should provide a plan that addresses the training needs of

- System Administrators
- Highest level users
- End users

3.2.6 Solution Delivery, System Acceptance Testing and Go-Live

The service provider must ensure that system testing and user acceptance testing has been completed and signed off before the live implementation. A complete test plan needs to be developed and implemented.

3.2.7 Skills Transfer

Skills transfer is required to all relevant internal resources

3.2.8 Technical Specifications Document

Service provider will be required to produce a Technical Specification Document

3.2.9 Service Level Agreement

Maintenance and support must be provided with a three year Service Level Agreement (SLA). The successful bidder must include a service level agreement in the proposal and provide guaranteed pricing for a year and include an annual increase per year for the duration of the SLA.

The bidder's SLA must also include the following:

- Resources that will be allocated to Sasria;
- Details of inclusions and exclusions and
- Turnaround times aligned to Sasria's internal SLA below inclusive of support meetings, SLA reporting and proactive maintenance requirements listed below

| Priority | Resolution Time |
|-------------------------------------|---|
| Critical | 4hrs |
| High | 5hrs |
| Medium | 6hrs |
| Low | 7hrs |
| System Enhancements and Maintenance | This requests will follow the change management process |

Support Meeting

Monthly meeting to review support calls and service level agreement performance.

SLA Reporting

Provide a monthly service level agreement performance report to Sasria. The performance report must include a breakdown of all issues logged, responses and hours utilised.

Proactive Maintenance

Include predefined checks to ensure a healthy state of the Intranet and Website

3.2.10 Search Engine Optimisation (SEO) copyright certification

Bidders may provide Search Engine Optimisation (SEO) copyright certification.

3.3. Contract Duration

The appointed service providers will be required to start immediately after signing the contract and provide the required services for a period of between 3 to 5 years which is subject to reviews of service provider's performance. Sasria reserves the right to extend or cancel the contract.

4. Part 4 - Financial Proposal

1 Bidders are required to provide a detailed and comprehensive price proposal i.e. all costs associated the bidder's proposal must be clearly specified and included in the Total Bid Price.

2 All prices must be VAT inclusive and must be quoted in South African Rand (ZAR).

3

| | | |
|--|-----|----|
| Is the proposed bid price linked to the exchange rate? | Yes | No |
| <i>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</i> | | |

4

| | | |
|---|--------|------------|
| Payments will be linked to specified deliverables after such deliverables have been approved by Sasria. | Comply | Not Comply |
| | | |

5

| | | |
|---|--------|------------|
| Sasria reserves the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction 03 of 2017/2018: Cost Containment Measures which took effect from 15 May 2017, where relevant. The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures. | Comply | Not Comply |
| Substantiate / Comments | | |

6 PRICING MODEL

6.1 SharePoint Online

| Cost Element | | Total Cost (VAT Excl.) |
|------------------------------------|--------|------------------------|
| SharePoint Online License | Year 1 | |
| | Year 2 | |
| | Year 3 | |
| | Year 4 | |
| | Year 5 | |
| Sub-Total (6.1) (VAT Excl.) | | |

6.2 Implementation Costs

| Activity/ Deliverable | Resource(s) | Rate/ Hour per resource | Number of hours | Total Cost (VAT Excl.) |
|-----------------------|-------------|-------------------------|-----------------|------------------------|
| Planning | | | | |
| | | | | |
| | | | | |
| | | | | |

| Activity/ Deliverable | Resource(s) | Rate/ Hour per resource | Number of hours | Total Cost (VAT Excl.) |
|--|-------------|-------------------------|-----------------|------------------------|
| Analysis | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Customisation / development / configuration | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Testing | | | | |
| | | | | |
| | | | | |
| | | | | |
| Migration of data | | | | |
| | | | | |
| | | | | |
| | | | | |
| Training | | | | |
| | | | | |
| | | | | |
| | | | | |
| Other Costs (if applicable) | | | | |
| | | | | |
| | | | | |
| | | | | |
| Disbursements | | | | |
| Sub-Total (6.2) (VAT Excl.) | | | | |

Note: The proposed Total Annual Fee must be inclusive of all required services as outlined in the scope of work (Part 3) above.

6.3 Post-Implementation Support

Sasria requires a fixed cost on system support and maintenance.

| Activity/ Deliverable | | Monthly Fee (VAT Excl.) | Annual Cost (VAT Excl.) |
|------------------------------------|--------|-------------------------|-------------------------|
| Post-implementation support | Year 1 | | |
| | Year 2 | | |
| | Year 3 | | |
| | Year 4 | | |
| | Year 5 | | |
| Sub-Total (6.3) (VAT Excl.) | | | |

6.4 Total Bid Price

| Activity/ Deliverable | Amount |
|------------------------------------|--------|
| Sub-Total (6.1) (VAT Excl.) | |
| Sub-Total (6.2) (VAT Excl.) | |
| Sub-Total (6.3) (VAT Excl.) | |
| Total Bid Price (VAT Excl.) | |
| VAT | |
| Total Bid Price (VAT Incl.) | |

Price Declaration Form

Dear Sir,

Having read through and examined the requirements of this RFP No. **2018/28**, and its related conditions, we offer to develop a SharePoint Online and Public Website as outline in scope of work, for the following total amount:

R..... (Excluding VAT)

In words

R..... (Excluding VAT)

We confirm that this price covers all activities associated with the scope of work, as called for in the RFP document. We confirm that Sasria will incur no additional costs whatsoever, over and above this amount in connection with the delivery of the required services.

We undertake to hold this offer open for acceptance for a period of 90 days from the date of submission of offers. We further undertake that upon final acceptance of our offer, we will commence the scope of work when required to do so by the Sasria.

We understand that you are not bound to accept the lowest or any offer, and that we must bear all costs which we have incurred in connection with preparing and submitting this bid.

We hereby undertake for the period during which this bid remains open for acceptance, not to divulge to any persons, other than the persons to whom the bid is submitted, any information relating to the submission of this bid or the details therein except where such is necessary for the submission of this bid.

| | | | |
|---------------------------|--|-------------|--|
| SIGNED | | DATE | |
| (Print name of signatory) | | | |
| Designation | | | |

| | | |
|------------------------------|---------------------|--|
| FOR AND ON BEHALF OF: | COMPANY NAME | |
| | Tel No | |
| | Fax No | |
| | Cell No | |

5. Part 5: Qualification and Evaluation Criteria

5.1. Evaluation of proposals

The purpose of the RFP is to obtain a complete set of salient information pertaining to the bidding parties. The proposals will accordingly be used to evaluate whether, at Sasria's discretion, an interested party qualifies to proceed to the next stage of this procurement process. All bidding parties will be advised in writing of Sasria's decision, which will be final. No correspondence will be entered into pertaining to the evaluation process, the decisions taken and reasons thereof.

5.2. Prequalifying Criteria

In terms of Regulation 4 of the 2017 PPPFA Regulations, Sasria requires that bidders meet the following pre-qualification criteria:

- The bidder must have a minimum B-BBEE contributor status level of 4 or better.

Note: Sasria will only consider a bid if the bidder meets these pre-qualification criteria. Where a bidder fails to meet these pre-qualification criteria, the bid will be considered an unacceptable bid and will be disqualified from further evaluation.

5.3. Evaluation Criteria

5.3.1. Level 1- Governance Verification

The evaluation during this stage is to review bid responses for purposes of assessing compliance with RFP requirements, which requirements include the following:

- Submission of a valid Tax Clearance Certificate as referenced in Part 2 above;
- Submission of a valid Certificate of Incorporation i.e. CIPC company registration documents as referenced in Part 2 above;
- Submission of a valid B-BBEE verification as referenced in Part 2 above;
- Submission of duly completed Standard Bidding Documents and other requirements, as reflected in this RFP, which cover the following:
 - Technical Proposal in line with the Technical Evaluation Criteria in Part 5 of this RFP document
 - Financial/ Price Proposal in line with Part 4 of this RFP document
 - All required documents in line with Part 6 of this RFP

Note: Failure to comply with the requirements assessed in Level 1 (governance), may lead to disqualification of bids.

5.3.2. Level 2- Technical Evaluation

The evaluation during this level is based on technical criteria (Functionality). The technical evaluation will be conducted in 3 phases, as follows:

The bidder’s proposal should respond comprehensively to the technical evaluation criteria. The technical evaluation criteria is set out below:

Phase 1: Mandatory Technical Requirements

All bid responses that do not meet all the Mandatory Technical Requirements will be disqualified, and will not be considered for further evaluation on the Other Technical Requirements. The Mandatory Technical Requirements are as follows:

| Mandatory Requirement | | Comply | Not Comply |
|-----------------------|---|--------|------------|
| 1 | The bidder must be Microsoft SharePoint accredited. The bidder must provide documentary proof for their accreditation. | | |

Phase 2 – Other Technical Evaluation Criteria

The bidder’s proposal should respond comprehensively to the technical evaluation criteria. The technical evaluation criteria is set out below:

Bidders will be evaluated for the SharePoint Online as indicated below:

| Item | Criteria | Points |
|------|---|--------|
| 1 | <p>Adherence to requirements</p> <p>The bidder must specify how the proposed solution will meet Sasria’s business requirements. The proposal must also include the full details of the proposed solution capabilities. Please refer to Annexure E: Detailed Requirements List to complete it accordingly.</p> <ul style="list-style-type: none"> • 90-100% (15 points) • 80-90% (12 points) • 70-80% (10.5 points) • Below 70% (7 points) | 15 |
| 2 | <p>Experience</p> <p>The bidder must indicate years of experience in working with emerging technologies (examples but not limited to AI, Robotics Workflow Automation etc.). Service provider must include list of entities where such technologies were implemented and year implemented. Please refer to Annexure D to complete it accordingly.</p> <ul style="list-style-type: none"> • 6 years and more (10 points) • 3-5 years’ experience (7 points) • 1-2 years’ experience (4 point) • 0 years’ experience (0 points) | 10 |

| Item | Criteria | Points |
|------|--|-----------|
| 3 | <p>The bidder must provide the detailed project plan clarifying the implementation approach and specify the below:</p> <ul style="list-style-type: none"> • Work breakdown structure • Milestones • Duration • Resource allocation to tasks • Project phases | 5 |
| 4 | <p>The experience of the team that will be involved in the project</p> <p>The experience of the team that will be serving the Sasria account The team's experience in SharePoint Online implementation</p> <ul style="list-style-type: none"> • ≥6 years' (5 points) • 4 - 5 years' (3.5 points) • ≤3 years' (2 points) <p>The bidder must provide comprehensive CVs of all team members to be involved in the project.</p> | 5 |
| 5 | <p>Reference Letters</p> <p>The bidder must provide relevant reference letters from clients where the bidder has implemented a similar SharePoint Online solution which is currently in use. Letters must be on the client's letterhead, signed and include a contactable telephone number.</p> <ul style="list-style-type: none"> • 3 reference letters (10 points) • 2 reference letters (7 points) • 1 reference letters (4 points) • 0 reference letters (0 points) | 10 |
| 6 | <p>Training, Testing and change management</p> <p>The bidder must submit the following plans:</p> <ul style="list-style-type: none"> • System & user acceptance testing plan • Change management plan • Role based training plan | 5 |
| | Total | 50 |

Bidders will be evaluated for the Website as indicated below:

| Item | Criteria | Points |
|------|---|--------|
| 1 | <p>Adherence to requirements (15)</p> <p>The bidder must specify how the proposed solution will meet Sasria’s business requirements. The proposal must also include the full details of the proposed solution capabilities. Please refer to Annexure E: Detailed Requirements List to complete it accordingly.</p> <ul style="list-style-type: none"> • 90-100% (15 points) • 80-90% (12 points) • 70-80% (10.5 points) • Below 70% (7 points) | 15 |
| 2 | <p>Experience (10)</p> <p>The bidder must indicate years of experience in working with emerging technologies (examples but not limited to AI, Robotics Workflow Automation etc.). Service provider must include list of entities where such technologies were implemented and year implemented. Please refer to Annexure D to complete it accordingly.</p> <ul style="list-style-type: none"> • 6 years and more (10 points) • 3-5 years’ experience (7 points) • 1-2 years’ experience (4 point) • 0 years’ experience (0 points) | 10 |
| 3 | <p>The bidder must provide the detailed project plan clarifying the implementation approach and specify the below:</p> <ul style="list-style-type: none"> • Work breakdown structure • Milestones • Duration • Resource allocation to tasks • Project phases | 5 |
| 4 | <p>The experience of the team that will be involved in the project</p> <p>The experience of the team that will be serving the Sasria account</p> <p>The team’s experience in Website implementation</p> <ul style="list-style-type: none"> • ≥6 years’ (5 points) • 4 - 5 years’ (3.5 points) • ≤3 years’ (1 points) | 5 |
| 5 | <p>Reference Letters</p> <p>The bidder must provide relevant reference letters from clients where the bidder has implemented a similar Website currently in use. Letters must be on the client’s letterhead, signed and include a contactable telephone number.</p> <ul style="list-style-type: none"> - 3 reference letters (10 points) - 2 reference letters (7 points) - 1 reference letters (2 points) - 0 reference letters (0 points) | 10 |

| | | |
|--------------|---|-----------|
| 6 | Training, Testing and change management System & user acceptance testing plan Change management plan Role based training plan | 5 |
| Total | | 50 |

Note: The bidders must score a minimum of 35 points for SharePoint Online and a minimum of 35 points for the Public Website in order to be invited for presentations.

Phase 3 – Presentations

| Item | Criteria | Points |
|----------|---|--------|
| 1 | Adherence to requirements (50) The service provider must clearly describe the proposed solution and the compliance to the deliverables and scope of the RFP as described in Annexure E. Scoring will be allocated as follows: <ul style="list-style-type: none"> • 90-100% (50 points) • 80-90% (42 points) • 70-80% (35 points) • Below 70% (25 points) | 50 |
| 2 | Experience (20) The bidder must indicate years of experience in working with emerging technologies (examples but not limited to AI, Chat bots etc.). Service provider must include list of entities where such technologies were implemented and year implemented. <ul style="list-style-type: none"> • 6 years and more – (20 points) • 3-5 years' experience – (14 points) • 1-2 years' experience – (8 point) • 0 years' experience (0 points) | 20 |
| 3 | The bidder must provide the detailed project plan clarifying the implementation approach and specify the below: <ul style="list-style-type: none"> • Work breakdown structure • Milestones • Duration • Resource allocation to tasks • Project phases | 10 |
| 4 | The experience of the team that will be involved in the project The team's experience in SharePoint Intranet and Website implementation <ul style="list-style-type: none"> • ≥6 years' 10 points) • 4 - 5 years' (7 points) • ≤3 years' (4 points) | 10 |

| | | |
|----------|---|------------|
| 5 | Responsiveness to questions Quality of presentation, including requirements met and project timelines Ability to respond to questions: | 10 |
| | Total | 100 |

5.3.3. Level 3 – Preference Point System

Bidders that achieved a minimum score of 70 points in last phase of the technical evaluation will progress to this level (level 3) and will be evaluated in accordance with the preference point system.

Points will be calculated on an 80/20 method as stipulated below:

| B-BBEE Status Level of Contributor | | Number of points (80/20) | % |
|---|---------------------------|---------------------------------|----------|
| 1 | 1 | 20 | 20 |
| | 2 | 18 | |
| | 3 | 14 | |
| | 4 | 12 | |
| | 5 | 8 | |
| | 6 | 6 | |
| | 7 | 4 | |
| | 8 | 2 | |
| | Non-Compliant Contributor | 0 | |
| 2 | Price (including VAT) | | 80 |

- Points scored will be rounded off to the nearest 2 decimal places.
- In the event that two or more tenders have scored equal total points, the successful tender must be the one scoring the highest number of preference points for B-BBEE.
- Should two or more tenders be equal in all respects, the award shall be decided by the drawing of lots.
- A contract may, on reasonable and justifiable grounds, be awarded to the bid that did not score the highest number of points.

STANDARD BIDDING DOCUMENTS

In addition to the Annexures listed below, the following documents must be completed, signed and submitted together with the bid response:

- Confidentiality and Non-disclosure Agreement (Annexure A);
- Invitation to Bid (SBD 1);
- Declaration of Interest (SBD 4);
- Preference Points Claims Form in terms of the Preferential Procurement Regulations 2017 (SBD 6.1);
- Declaration of Bidder’s Past SCM Practices (SBD 8); and
- Certificate of Independent Bid Determination (SBD 9).

Note: Failure to submit these documents may lead to disqualification of the bid.

ANNEXURE A: NON DISCLOSURE AGREEMENT

MEMORANDUM OF AGREEMENT

Entered into between:

Sasria SOC Ltd

A company duly incorporated under the laws of *Republic of South Africa*, having its main place of business at 36 Fricker Road, Illovo, Sandton Johannesburg, with registration number: 1979/000287/06

(Hereinafter referred to as “the Discloser”)

And

.....

A company duly incorporated under the laws of Republic of South Africa, having its main place of business

at....., with

registration number:.....

(Hereinafter referred to as “the Recipient”)

PREAMBLE

Whereas the Discloser will disclose certain confidential information to the Recipient, for purposes of _____
_____;

And whereas the Recipient wishes to receive confidential information on the condition that the Recipient will not disclose the same to any third party or make use thereof in any manner except as set out below.

The Discloser and the Recipient hereby agree to the following:

1. Definitions

Unless the contrary is clearly indicated, the following words and/or phrases, when used in this Agreement, shall have the following meaning:

1.1 “Agreement” shall mean this written document together with all written appendices, annexures, exhibits or amendments attached to it from time to time;

1.2 “Commencement Date” shall mean the date of last signature of this agreement;

1.3 “Confidential Information” shall mean all information which:

1.3.1 pertains to the Disclosing Purpose, disclosed, revealed or exchanged by the Discloser to the Recipient, and which pertains to, but is not limited to all intellectual property rights, all trade secrets, all agreements (whether in writing or not) which exist at the time of revealing the content thereof to the Recipient, the content of all possible future agreements which the Discloser intends to enter into with any other party, all knowledge obtained by way of research and development, irrespective of whether the aforementioned information that is revealed is applicable to technical, business or financial aspects of the Discloser; and/or

1.3.2 any information of whatever nature, which has been or may be submitted by the Discloser to the Recipient, whether in writing or in electronic form or pursuant to discussions between the Parties, or which can be obtained by

examination, testing, visual inspection or analysis, including, without

limitation, business or financial data, know-how, formulae, processes, specifications, sample reports, models, customer lists, computer software, inventions or ideas; and/or

1.3.3 Any dispute between the Parties resulting from this Agreement; and/or

1.3.4 Any fault or defect in any aspect of the business of the Discloser, irrespective of whether the Discloser knows about such a fault or defect;

1.4 “**Notice**” shall mean a written document;

1.5 “**Parties**” shall mean both the Discloser (**Sasria SOC Ltd**) and the Recipient.

1.6 “**Board**” shall mean Board of Directors of the Discloser.

2. **Obligations of the Recipient**

The Recipient shall:

2.1 use the confidential information disclosed to it solely for the purposes of
.....
.....
.....and for no other purpose whatsoever (“Disclosing Purpose”);

2.2 treat and safeguard the Confidential Information as private and confidential;

2.3 ensure proper and secure storage of all Confidential Information;

2.4 not at any time without the prior written consent of the Discloser or another employee of the disclosure from which he received the information,

2.4.1 disclose or reveal to any person or party either the fact that discussions or negotiations are taking, or have taken place between the Board, employee and another employee or the content of any such discussions or other facts relating to the Disclosing Purpose, except where required by law or any governmental, or regulatory body;

2.5 not create the impression with or lead any third party to interpret or construe any

- condition contained in this Agreement, that this Agreement is an Agency Agreement and/or Partnership Agreement and/or a Joint Venture and/or any other similar arrangement;

2.6 not allege that this Agreement grants it, either directly, or by implication, or by estoppel or otherwise a license under any patent or patent application, or that

it is entitled to utilize the Confidential Information in any way contrary to the stipulations contained in this Agreement;

- 2.7 on termination of this Agreement act with the Confidential Information in accordance with a Notice delivered to it by the Discloser and if no such Notice was delivered, the Recipient shall destroy the Confidential Information in a similar manner to which it would destroy information that it would consider to be its own Confidential Information.

3. **Obligations of the Discloser**

Subject to clause 2, the Discloser shall:

- 3.1 disclose to the Recipient, in writing any relevant information in their possession or under their care; and
- 3.2 furnish the Recipient at least 7 (seven) calendar days prior to this Agreement being terminated, for whatever reason, with a Notice instructing the Recipient about what it should do with the Confidential Information once the Agreement has been terminated.

4. **Exclusions**

The provisions of **Clause 3** above will not apply to any Confidential Information which:

- 4.1 is at the time of disclosure to the Recipient, within the public domain and could be obtained by any person with no more than reasonable diligence;
- 4.2 come into the public domain and could be obtained after such disclosure, otherwise than by reason of a breach of any of the undertakings contained in this Agreement;
- 4.3 is subsequently provided to the Recipient by a person who has not obtained such information from the Discloser, provided that, in any such case, such information was not obtained illegally or disclosed by any person in breach of any undertaking or duty as to confidentiality whether expressed or implied;
- 4.4 is disclosed with the written approval of the Discloser;
- 4.5 is or becomes available to a third party from the Discloser on an unrestricted basis;
- 4.6 is obliged to be reproduced under an order of court or government agency of

competent jurisdiction.

5. Commencement

This Agreement shall commence on the Commencement Date.

6. Cancellation

6.1 The Agreement shall not terminate automatically. Either party must be able to terminate on written notice to the other party once the Disclosing Purpose is completed. The obligations of confidentiality under this Agreement shall continue to apply after assignment or termination of this Agreement.

6.2 The Parties further agree that either Party shall have the right at any time to give notice in writing to terminate this Agreement forthwith in the event of a material breach of any of the terms and conditions of the Agreement. If the breach in question is one which can effectively be remedied, the Parties shall endeavour to jointly try to remedy such breach, failing which, the Agreement shall be terminated.

7. Interpretation

7.1 The clause headings in this Agreement have been inserted for convenience only and will not be taken into consideration in the interpretation of this Agreement;

7.2 Any reference in this Agreement to the singular includes the plural and *vice versa*;

7.3 Any reference in this Agreement to natural persons includes legal persons and references to any gender include references to the other genders and *vice versa*.

8. Dispute Resolution

8.1 A dispute concerning or arising out of this Agreement exists once a party notifies the others in writing of the nature of the dispute and requires it to be resolved under this clause. The parties must refer any dispute to be resolved by -

- negotiation; failing which
- mediation; failing which
- arbitration

- 8.2 Within ten (10) Business Days of notification, the parties must seek an amicable resolution to the dispute by referring it to designated and authorized representatives of each of the parties to negotiate and resolve it by the parties signing an agreement resolving it within fifteen (15) Business Days
- 8.3 If negotiation fails, the parties must refer the dispute for resolution by mediation under the rules of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead) ("AFSA").
- 8.4 If mediation fails, the parties must refer the dispute within fifteen (15) Business Days for resolution by arbitration (including any appeal against the arbitrator's decision) by one arbitrator (appointed by agreement between the parties) as an expedited arbitration in Sandton under the then current rules for expedited arbitration of AFSA.
- 8.5 If the parties cannot agree on any arbitrator within a period of ten Business Days after the referral, the arbitrator will be appointed by the Secretariat of AFSA.
- 8.6 The periods for negotiation or mediation may be shortened or lengthened by written agreement between the parties.
- 8.7 This clause will not preclude any party from access to an appropriate court of law for interim relief in respect of urgent matters by way of an interdict, or mandamus pending finalisation of this dispute resolution process, for which purpose the parties irrevocably submit to the jurisdiction of a division of the High Court of the Republic of South Africa.
- 8.8 This clause is a separate, divisible agreement from the rest of this Agreement and must remain in effect even if the Agreement terminates, is nullified, or cancelled for any reason or cause.

9. Domicilium and Notices

The Parties elect the following addresses as their respective *domicilium citandi et executandi*, at which all notices and other communications must be delivered for the purposes of this Agreement:

9.1 Discloser:

9.1.1 by hand at 36 Fricker Road, Illovo, Sandton, Johannesburg

Marked for the attention of:

9.1.2 by post at: **P.O. Box 653367, Benmore, 2010**

Marked for the attention of

9.1.3 by telefax at (011) 447 8624

Marked for the attention of

9.2 Recipient:

9.2.1 by hand at

Marked for the attention of.....

9.2.2 by post to: _____

Marked for the attention of:

9.2.3 by telefax atMarked for the attention of:

.....

9.3 Any notice or communication required or permitted to be given in terms of this agreement shall only be valid and effective if it is in writing.

9.4 Any notice addressed to either of the Parties and contained in a correctly addressed envelope and sent by registered post to it at its chosen address or delivered by hand at its chosen address to a responsible person on any day of the week between 09h00 and 16h00, excluding Saturdays, Sundays and South African public holidays, shall be deemed to have been received, unless the contrary is proved, if sent by registered post, on the 14th (fourteenth) calendar day after posting and, in the case of hand delivery, on the day of delivery.

9.5 Any notice sent by telefax to either of the Parties at its telefax number shall be deemed, unless the contrary is proved, to have been received:

9.5.1 if it is transmitted on any day of the week between 09h00 and 16h00, excluding Saturdays, Sundays and South African public holidays, within 2 (two) hours of transmission;

9.5.2 if it is transmitted outside of these times, within 2 (two) hours of the commencement any day of the week between 09h00 and 16h00, excluding Saturdays, Sundays and South African public holidays, after it has been transmitted.

10. Entire Agreement and Variations

10.1 This Agreement constitutes the whole agreement between the Parties and supersedes all prior verbal or written agreements or understandings or representations by or between the Parties regarding the subject matter of this

Agreement, and the Parties will not be entitled to rely, in any dispute regarding this Agreement, on any terms, conditions or representations not expressly contained in this Agreement.

10.2 No variation of or addition to this Agreement will be of any force or effect unless reduced to writing and signed by or on behalf of the Parties.

10.3 Neither party to this Agreement has given any warranty or made any representation to the other party, other than any warranty or representation which may be expressly set out in this Agreement.

11. Data Security

11.1. The Recipient shall, at all times, ensure compliance with any local and international laws, regulations, policies or codes that may be enacted from time to time and put in place and maintain sufficient measures, policies and systems to manage and secure against all forms of risk to any information that may be shared or accessed through a computer or any other form of electronic communication pursuant to the Agreement. For purposes of this clause 0,

“Information” shall mean, but not be limited to:

11.1.1. all cyber related information, including data; a computer program; output of a computer program; a computer system; article; data message; a computer data storage medium; output of a computer program and output of data;

•
11.1.2. Personal Information as defined in section 1 of the Protection of Personal Information Act No. 4 OF 2013 (“**POPIA**”) read with Section 1 of the Promotion of Access to Information Act No. 2 of 2000; and

11.1.3. Any other information that may be shared or accessed pursuant to the Agreement.

11.2. The Recipient shall notify the Discloser in writing of any cybercrimes or any suspected cybercrimes in its knowledge and to report such crimes or suspected crimes to the relevant authorities in accordance with applicable laws, within 10 days of becoming aware of such crime or suspected crime.

12. Protection Of Personal Information

12.1. For purposes of this clause 112 -

12.1.1. the following terms shall bear meanings contemplated in Section 1 of the POPIA: **consent; data subject; electronic communication; information officer; operator; person; personal information; processing; record; Regulator; responsible party; special information;** as well as any terms derived from these terms.

- 12.1.2. **“binding corporate rules”** means personal information processing policies, within a group of undertakings, which are adhered to by a responsible party or operator within that group of undertakings when transferring personal information to a responsible party or operator within that same group of undertakings in a foreign country; and **“group of undertakings”** means a controlling undertaking and its controlled undertakings.
- 12.2. The Parties acknowledge and agree that, in relation to personal information that may be processed pursuant to the Agreement, the Discloser is the responsible party and the Recipient is the operator.
- 12.3. The Recipient must process such personal information only with the knowledge or authorisation of the Discloser and treat personal information which comes to its knowledge as confidential and must not disclose it, unless so required by law.
- 12.4. The Recipient must secure the integrity and confidentiality of personal information in its possession or under its control by taking appropriate, reasonable technical and organisational measures to prevent loss of, damage to or unauthorised destruction of personal information and unlawful access to or processing of personal information.
- 12.5. In order to give effect to the obligations set out in this clause 112, the Recipient must take reasonable measures to-
- 12.5.1. identify all reasonably foreseeable internal and external risks to personal information in its possession or under its control;
- 12.5.2. establish and maintain appropriate safeguards against the risks identified;
- 12.5.3. regularly verify that the safeguards are effectively implemented; and
- 12.5.4. ensure that the safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards.
- 12.6. The Recipient shall have due regard to generally accepted information security practices and procedures which may apply to it generally or be required in terms of specific industry or professional rules and regulations.
- 12.7. The Recipient shall notify the Discloser immediately where there are reasonable grounds to believe that the personal information of a data subject has been accessed or acquired by any unauthorised person.
- 12.8. The Recipient shall appoint an information officer and an appropriate number of deputy information officers as may be required by the POPIA, and must provide the Discloser

with the details of such officers, whose responsibilities shall include-

- 12.8.1. the encouragement of compliance, by the Recipient, with the conditions for the lawful processing of personal information;
 - 12.8.2. dealing with requests made to the Recipient pursuant to the POPIA;
 - 12.8.3. working with the Regulator in relation to investigations conducted under the POPIA;
 - 12.8.4. otherwise ensuring compliance by the Recipient with the provisions of the POPIA; and
 - 12.8.5. as may be prescribed by the POPIA.
- 12.9. The Recipient shall not transfer personal information about a data subject to a third party who is in a foreign country without Prior written consent of the Discloser. The Discloser will not grant such consent unless-
- 12.9.1. the third party who is the recipient of the information is subject to a law, binding corporate rules or binding agreement which provide an adequate level of protection that-
 - 12.9.1.1. effectively upholds principles for reasonable processing of the information that are substantially similar to the conditions for the lawful processing of personal information relating to a data subject who is a natural person and, where applicable, a juristic person; and
 - 12.9.1.2. includes provisions, that are substantially similar to this section, relating to the further transfer of personal information from the recipient to third parties who are in a foreign country;
 - 12.9.2. the data subject consents to the transfer;
 - 12.9.3. the transfer is necessary for the performance of a contract between the data subject and the responsible party, or for the implementation of pre-contractual measures taken in response to the data subject's request;
 - 12.9.4. the transfer is necessary for the conclusion or performance of a contract concluded in the interest of the data subject between the responsible party and a third party; or
 - 12.9.5. the transfer is for the benefit of the data subject, and-
 - 12.9.5.1. it is not reasonably practicable to obtain the consent of the data subject to that transfer; and
 - 12.9.5.2. if it were reasonably practicable to obtain such consent, the data subject would be likely to give it.
- 12.10. The Recipient shall process personal information of data subjects in accordance with

the conditions for the lawful processing of personal information as contemplated in the POPIA, and shall at all times put sufficient measures in place to ensure compliance with the POPIA, including compliance with any compliance notices and information notices served on the Recipient under the POPIA.

13. Assignment, Cession and Delegation

Neither of the Parties shall be entitled to assign, cede, delegate or transfer any rights, obligations, share or interest acquired in terms of this Agreement, in whole or in part, to any other party or person without the prior written consent of the other, which consent shall not unreasonably be withheld or delayed.

14. Relaxation

No indulgence, leniency or extension of a right, which either of the Parties may have in terms of this Agreement, and which either party (“the grantor”) may grant or show to the other party, shall in any way prejudice the grantor, or preclude the grantor from exercising any of the rights that it has derived from this Agreement, or be construed as a waiver by the grantor of that right.

15. Waiver

No waiver on the part of either party to this Agreement of any rights arising from a breach of any provision of this Agreement will constitute a waiver of rights in respect of any subsequent breach of the same or any other provision.

16. Severability

In the event that any of the terms of this Agreement are found to be invalid, unlawful or unenforceable, such terms will be severable from the remaining terms, which will continue to be valid and enforceable.

17. Governing Law

The validity and interpretation of this Agreement will be governed by the laws of the Republic of South Africa.

SIGNATURES

I, the undersigned, , herewith confirms that my position within

the Recipient is that of and state that I am duly authorised to enter into this Agreement, which I herewith do, on this theday, of, for and on behalf of the Recipient.

I, the undersigned, herewith confirms that my position within the Discloser is that of Executive Manager: and state that I am duly authorised to enter into this Agreement, which I herewith do, on this the ____ day, of by signing this Agreement, for and on behalf of the Discloser.

Signature for and on behalf of Discloser

Signature for and on behalf of Recipient

ANNEXURE B: ACCEPTANCE OF BID CONDITIONS AND BIDDER'S DETAILS

RFP No: _____

Name of Bidder: _____

Authorised signatory: _____

Name of Authorised
Signatory _____

Position of Authorised
Signatory _____

By signing above the bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this RFP.

[Note to the Bidder: The Bidder must complete all relevant information set out below.]

CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

Bidders are required to be registered on the Central Supplier Database (CSD) of National Treasury. Failure to submit the requested information may lead to disqualification. Bidders are therefore required to submit as part of this proposal both their CSD supplier number and CSD unique registration reference numbers below:

| | |
|---|--|
| Supplier Number | |
| Unique registration reference number | |

BIDDING STRUCTURE

| | |
|---|--|
| Indicate the type of Bidding Structure by marking with an 'X': | |
| Individual Bidder | |
| Joint Venture/ Consortium | |
| Prime Contractor with Sub Contractors | |
| Other | |

REQUIRED INFORMATION

| | |
|------------------------------|--|
| If Individual Bidder: | |
| Name of Company | |

| If Individual Bidder: | |
|------------------------------|--|
| Registration Number | |
| Vat registration Number | |
| Contact Person | |
| Telephone Number | |
| Cell phone Number | |
| Fax Number | |
| Email address | |
| Postal Address | |
| Physical Address | |

| If Joint Venture or Consortium, indicate the following for each partner: | |
|---|--|
| Partner 1 | |
| Name of Company | |
| Registration Number | |
| Vat registration Number | |
| Contact Person | |
| Telephone Number | |
| Cell phone Number | |
| Fax Number | |
| Email address | |
| Postal Address | |
| Physical Address | |
| Scope of work and the value as a % of the total value of the contract | |
| Partner 2 | |

| | |
|---|--|
| Name of Company | |
| Registration Number | |
| Vat registration Number | |
| Contact Person | |
| Telephone Number | |
| Cell phone Number | |
| Fax Number | |
| Email address | |
| Postal Address | |
| Physical Address | |
| Scope of work and the value as a % of the total value of the contract | |

| | |
|---|--|
| If bidder is a Prime Contractor using Sub-contractors, indicate the following: | |
| Prime Contractor | |
| Name of Company | |
| Registration Number | |
| Vat registration Number | |
| Contact Person | |
| Telephone Number | |
| Cell phone Number | |
| Fax Number | |
| Email address | |
| Postal Address | |
| Physical Address | |
| Sub-contractors | |

| | |
|--|--|
| Name of Company | |
| Company Registration Number | |
| Vat registration Number | |
| Contact Person | |
| Telephone Number | |
| Cell phone Number | |
| Fax Number | |
| Email address | |
| Postal Address | |
| Physical Address | |
| Subcontracted work as a % of the total value of the contract | |

ANNEXURE C: SHAREHOLDER INFORMATION

[Note: the bidder must complete the information set out below. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

1 Shareholders/ Members

| Name of the shareholder | ID Number | Race | Gender | % shares |
|-------------------------|-----------|------|--------|----------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Note: The bidder must also attach the detailed Company/ Group Structure where relevant.

2 Black Shareholders/ Members as per the B-BBEE Certificate

| Name of the shareholder | ID Number | Race | Gender | % shares |
|---|-----------|------|--------|----------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total Black Shareholding % as per the current and valid B-BBEE Certificate | | | | |

ANNEXURE D: BIDDER'S EXPERIENCE IN EMERGING TECHNOLOGIES

| Description of Technology | Name of Client | Number of years working with client to implement the technology |
|----------------------------------|-----------------------|--|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

ANNEXURE E: DETAILED REQUIREMENTS

Please refer to the attached spreadsheet.