



**REQUEST FOR PROPOSAL  
FOR PROVISION OF ENTERPRISE ARCHITECTURE AND  
BUSINESS PROCESS MODELLING SERVICES**

**RFP: JS/07/2020**

**Compulsory Briefing Session:** (not compulsory): 06 August 2020 at 11h00 am

Please note that briefing session will be held via zoom, should you wish to attend, kindly indicate via email so that we can send you the link.

**Bid closing date: Friday 04 September 2020 at 11h00**

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## **1. INTRODUCTION**

The Department of Human Settlements is in the process of establishing a Human Settlements Development Bank (“HSDB”). The purpose of which is to position the HSDB as a vehicle to provide effective public and private funding, financing support to key segments of the housing market, in the face of considerable market failure, significant need and a declining fiscus.

In 2008, the National Treasury undertook a review of the mandates of South Africa’s Development Finance Institutions (DFIs) at the request of Cabinet. The review was conducted in consultation with the national departments responsible for the DFIs. To support expanded housing delivery, the Treasury Review recommended amalgamating the three-housing sector DFIs into a single institution in order to have greater impact, viability and increased scale.

The National Housing Finance Corporation SOC Ltd (NHFC) has now merged with NURCHA and RHLF (all 3 entities previous human settlements DFIs) to deliver quality financial support for the development of a sustainable and integrated human settlements in the country. The NHFC needs to strategically reposition itself as the Human Settlements DFI of choice through significantly enhancing its product offering, financial strength and building capabilities in order to make a positive developmental impact, whilst balancing the challenges of economic viability and developmental imperative. This will be achieved through the establishment of the HSDB.

## **2. PURPOSE**

The NHFC is embarking on a transformation journey to review its current operating model and position it to align ICT Strategy with the Business Strategy. To achieve this, the NHFC needs to adopt Enterprise Architecture for effective and efficient Business and ICT portfolio planning, operational efficiency, execution and governance. Enterprise Architecture focuses on establishing a common framework for defining, managing and governing Business/ ICT structure, relationship and components.

Enterprise Architecture represents an integrated organizational blueprint for execution of business strategy through ICT and covers strategy, tactical and operational domains. The adoption of such a Framework will ensure that strategic projects are all

well positioned to take advantage of the benefits to be harvested from applying the Enterprise Architecture approach to ensure the successful implementation of the business strategies.

It is in this context that the NHFC seeks the services of resources with extensive experience in Enterprise Architecture (EA) and in particular the various facets of an enterprise wide Architecture in Financial Services, Lending and Business Process Modelling (BPM) services. The Service Provider is expected to align to industry best practices; leverage previous Enterprise Architecture experience and provide architecture insight when defining the Enterprise Architecture for the NHFC.

### **3. TERM OF THE APPOINTMENT**

The contract in respect of the assignment will be signed between the Service Provider and NHFC for a period not exceeding twelve (12) months for the completion of the exercise.

### **4. BACKGROUND**

The NHFC was established by the National Department of Human Settlements as a development finance institution (DFI) in 1996, with the principle mandate of broadening access to affordable housing finance for the low- and middle-income households.

NHFC is a registered state-owned company. As a Schedule 3A national public entity, the NHFC adheres to the regulatory framework of the Public Finance Management Act (PFMA) of 1999.

The NHFC provides wholesale funding in the affordable housing market mainly to social housing institutions, non-banking retail intermediaries, building contractors privately owned property developers and investors. It provides loans and other forms of wholesale funding (equity and quasi equity) to certain niche businesses that operate in the affordable housing market.

Effective from 01 October 2018, the company merged with National Urban Reconstruction and Housing Agency SOC NPC (NURCHA) and Rural Housing Loan Fund SOC NPC (RHLF). The NHFC will serve as a consolidated platform for the establishment of the HSDB. The process of winding up these two entities has commenced. It is envisaged that the NHFC will continue in its existing legal format but

will change its constitution documents to conform to the HSDB requirements once established.

## 5. SCOPE OF WORK AND TECHNICAL REQUIREMENTS

The scope of this tender comprises of two services required to run concurrently:

- The EA function covering all the EA domains (i.e. *Business Architecture, Data Architecture, Solution Architecture, Technology Architecture, Application Architecture and Security Architecture*); and
- Business Process Modelling of the entire organization.

The successful bidder must comply with The Open Group Architecture Framework (TOGAF), and Government Wide Enterprise Architecture (GWEA) Framework in defining the Architecture.

The service provider must provide project management services with a detailed project plan, provide a detailed approach and adequate resources to ensure that both streams are delivered within a period of twelve (12) months. The artefacts to be delivered for both EA and BPM must be designed in the NHFC's recommended EA tool.

The bidders are invited to assist the NHFC with the introduction, establishment and implementation of Enterprise Architecture and Business Process Modelling to address the following requirements:

Development of the AS-IS architecture:

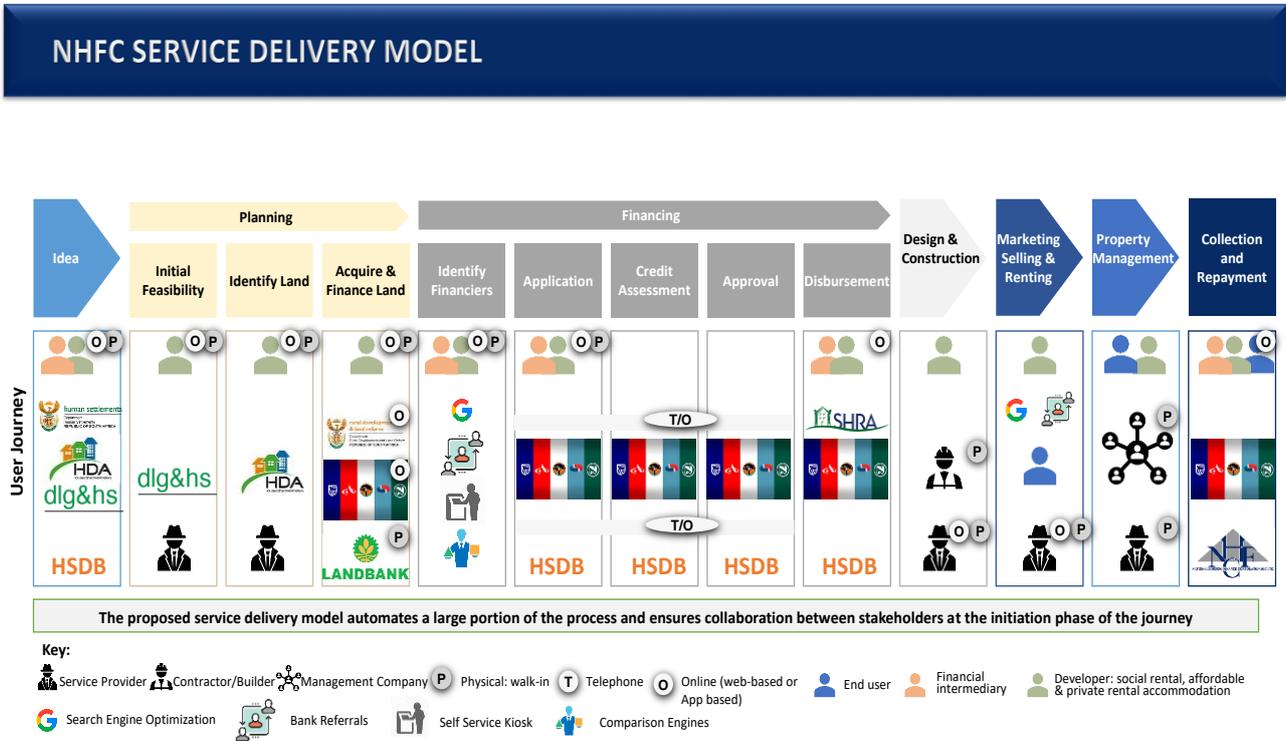
- Business architecture;
- Data architecture;
- Application architecture;
- Security architecture; and
- Technology architecture.

Development of the TO-BE architecture with the following deliverables:

- Business architecture;
- Data architecture;
- Application architecture;
- Security architecture;

- Technology architecture;
- Governance of the architecture including the principles;
- Governance of the technical environment; and
- Derive a master plan for implementation.

The NHFC’s service delivery model and business value-chain is depicted in *Figure 1* below.



**Figure 1: NHFC (HSDB) Service delivery model and value chain**

Figure 2a and 2b below depicts the NHFC’s income generating streams and the associated supporting departments respectively.

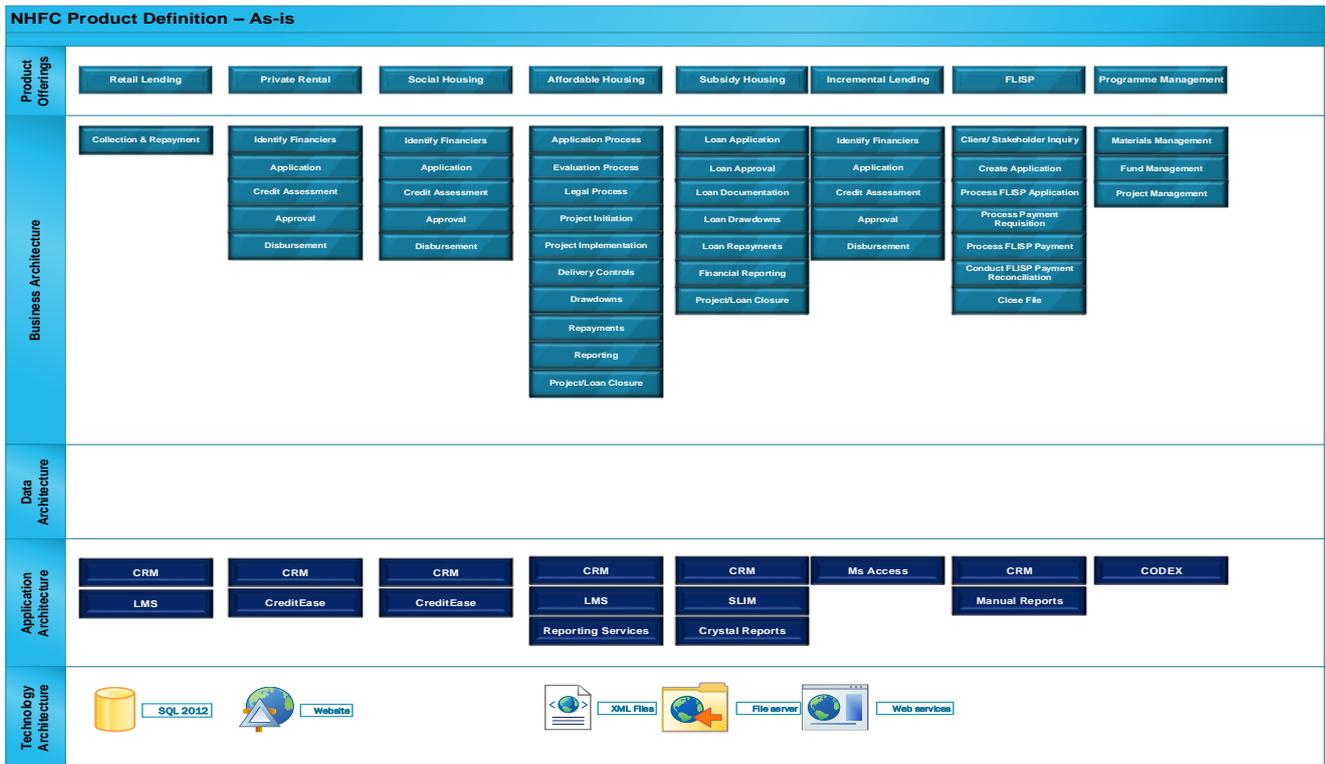


Figure 2a: NHFC Income Generating Streams

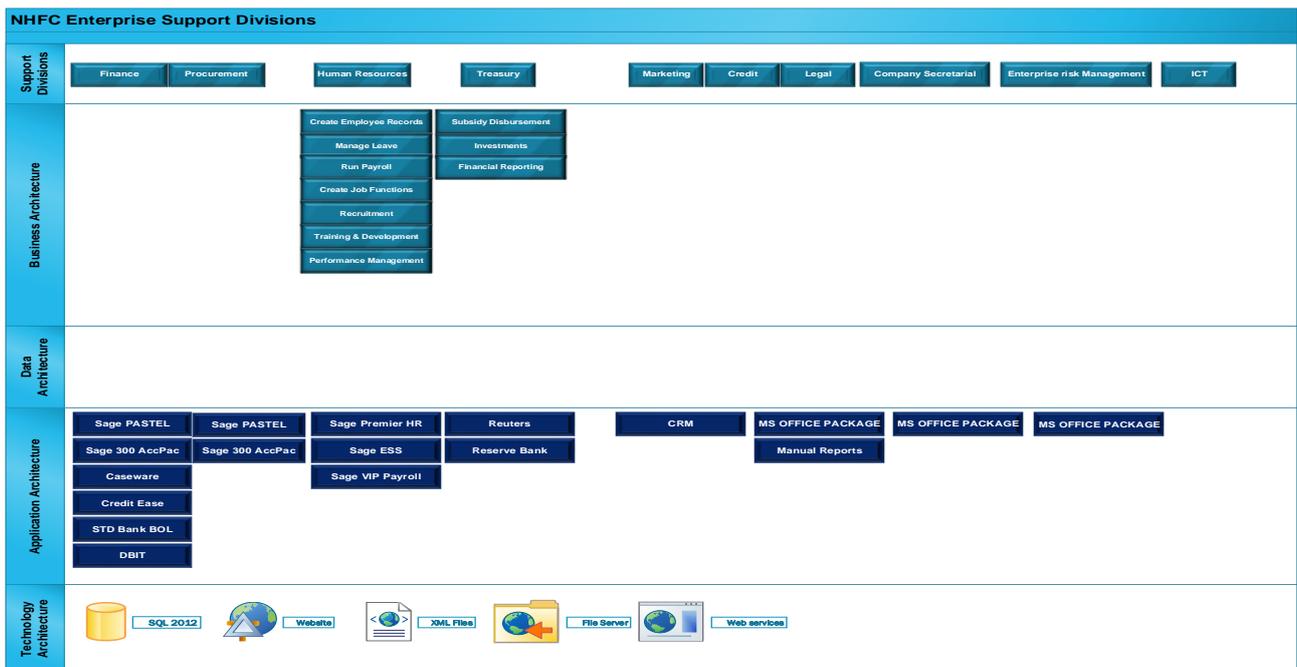


Figure 2b: NHFC Operations Divisions

## 6. DELIVERABLES

The selected service provider will be expected to provide the following deliverables:

- Current state architecture;
- Future state architecture;
- Gap analysis and roadmap; and
- Documented outputs/artefacts from the above exercises.

## **6.1 CURRENT STATE ARCHITECTURE**

- A maturity assessment of the NHFC's Enterprise Architecture capability;
- An aligned vision, strategy and approach for the Enterprise Architecture at the NHFC;
- Key areas which must be documented include Architecture drivers, clear alignment to the Business Strategy, a resource plan and identified quick wins;
- A representation of the current state Architecture at contextual and conceptual levels (all domains).

## **6.2 FUTURE STATE ARCHITECTURE**

- An Enterprise Architecture framework with a robust set of principles and processes as well as any other required policies, standards or processes for the NHFC aligned to best practices and the NHFC environment;
- A representation of the proposed future state Architecture for the NHFC at contextual and conceptual levels (all domains).
- Guide and train the NHFC technical team to implement the following architectures:
  - Technology Architecture;
  - Information Architecture;
  - Business & Process Architecture;
  - Security Architecture; and
  - Application Architecture.

## **6.3 GAP ANALYSIS AND ROADMAP**

- A gap analysis between the current state Architecture and the proposed future state Architecture;
- A five (5) year Architecture roadmap for the NHFC in line with the Business and ICT Strategy.

## **6.4 OUTPUTS**

The following outputs are expected from the Enterprise Architecture definition exercise:

- A documented Enterprise Architecture, in terms of the topics described;
- All graphical content from this engagement must be modeled and available for reuse in an EA Tool; and

- The service provider is expected to produce interim reports at each phase which will be discussed and approved. The reports will form part of the final output.

## **7. BUSINESS PROCESS MODELLING DELIVERABLES**

To improve the business operations and services the NHFC is currently running a transformation programme with the objective to modernise the technology and processes within the organization in preparation for the organizational transition to Human Settlement Development Bank. The main aim is to ensure that the NHFC runs as an efficient and effective organisation through process improvement, innovation and automation. This should ensure a reduction in administration costs over time.

Throughout the modernisation process, there will be a need to improve both processes and technology. This may result in a skills gap that might require training. It is important to be constantly aware of any gap between process, technology and skills. Modernisation is primarily concerned with doing business differently, hence the requirement for aligning business resources accordingly and ensuring that training and development are embedded in the processes to meet evolved business requirements.

It is essential that NHFC addresses the process shortcomings that exist within the organisation. Therefore NHFC wishes to bring on board a service provider to address the Business Process Management (BPM) requirements of the organisation.

The expectation is that the Service Provider will provide NHFC with an appropriate methodology, together with relevant experience in BPM, to facilitate, assist and guide NHFC in the implementation of BPM as a philosophy and the successful adoption of a process culture.

To ensure that the successful bidder can provide the requisite business knowledge, and services it is envisaged that the following key attributes are demonstrated throughout the tender response:

- The service provider has a demonstrable expert knowledge of Business Process Management;
- The Service Provider must have a demonstrable methodology and approach to the implementation of BPM and a process culture within an organization;
- Some (but not all) of the deliverables expected as part of this tender will be:

- Process Maturity Assessment and corresponding roadmap to improve the current status;
- BPM awareness and training using the “train the trainer” approach, training a maximum of 20 NHFC resources;
- Modelling of the NHFC business processes;
- Definition of processes and Standard Operating Procedures (SOPs) for the publication of process repository content to the intranet using identified EA Tool; and
- The service provider must demonstrate experience in identifying, defining and implementing business rules management practice.

## **7.1 BUSINESS PROCESS MANAGEMENT SCOPE**

The business process management component of the project will include the following items:

- BPM Maturity Assessment & Roadmap;
- BPM Training and Awareness;
- BPM Governance;
- Identification, Definition & Modelling of Processes; and
- Support for Software Development Life-Cycle (SDLC).

## **7.2 REPOSITORY MANAGEMENT SCOPE**

The following EA Tool repository related services should be provided by the selected service provider:

- EA Tool Configuration; and
- EA Tool Scripting.

It must be noted that NHFC does not have an EA Tool and is in the process of acquiring one.

## **8. EXPERTISE AND SKILLS REQUIRED**

The key criteria to be considered for a suitably qualified and experienced service provider:

- a) At least 5 years' business strategist experience ideally in the financial sector, whether state and/or private sector;
- b) A proven track record of having performed similar engagements;
- c) In-depth knowledge and experience of working with Enterprise Architecture;
- d) Have developed customised Enterprise Architecture solutions for a client;
- e) Good understanding and adoption of project management methodologies; and
- f) Good communication and report writing skills.

NB: Proposals should be able to not only provide what is mentioned above but also indicate areas of importance pertinent to the process. Experience in developing a portfolio of digital offerings will be an additional advantage.

## **9. COMPULSORY DOCUMENTS REQUIRED**

- a) Bidders are required to submit a copy tax clearance certificate (TCC) and their unique personal identification number (pin) issued by SARS to enable the NHFC to view the bidders tax status.
- b) The firm must be registered on the National Treasury supplier database at the time of submitting the proposal. Copy of Central Supplier Database Report must be submitted.
- c) Bidders must submit proof of Company Registration
- d) Certified Copy of B-BBEE Certificate/ Sworn Affidavit
- e) Submission of the following Signed and Completed Standard Bid Documents (SBD) Forms:
  - SBD 1: Invitation to Bid
  - Pricing Schedule (Detailed Price Breakdown on bidder's company letterhead and signed by authorised person)
  - SBD 4: Declaration of Interest
  - SBD 6.1 Preference Points Claim Form in terms of preferential procurement
  - SBD 7.2 Contract Form – Rendering of Services
  - SBD 8: Declaration of Bidder's Past SCM Practices
  - SBD 9: Certificate of Independent Bid Determination
  - General Conditions of Contract (GCC)

All forms, annexures, addendums and specifications shall be signed and completed and returned with the RFP Document as a whole.

## **10. EVALUATION CRITERIA**

The proposal will be evaluated in terms of the Preferential Procurement Policy Framework Regulations of 2017. Evaluation of the bid will be conducted in 3 (three) phases as follows:

## Phase 1: Eligibility / Pre-Qualification criteria

Bidders will be evaluated according to pre-qualification requirements which include the submission of mandatory information or documentation as stated in section 9 of this document. Bidders that fail to meet the pre-qualification requirements of the bid will not be considered further for evaluation.

## Phase 2: Technical/functional evaluation

Category	Criteria	Sub-category	Points																
1.	<p><b>Experience and Expertise of company and key Personnel</b></p> <p><b>Experience of the company</b></p> <p>The company must demonstrate experience of Digital Business Transformation delivery using Enterprise Architecture at a minimum of Two (2) clients.</p> <p>Please provide reference letters as proof for all EA projects implemented.</p> <p><b>Reference letters must be on client's letter head.</b></p> <table border="1" data-bbox="357 1039 1043 1211"> <thead> <tr> <th>Number of Projects</th> <th>Points</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> </tr> <tr> <td>2</td> <td>5</td> </tr> <tr> <td>More than 2</td> <td>10</td> </tr> </tbody> </table>	Number of Projects	Points	0	0	2	5	More than 2	10	10	30								
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0	0																		
2	5																		
More than 2	10																		
	<p><b>Experience of the EA Resources</b></p> <p>The domain architecture resources that will be delivering the EA must have a minimum of three (3) years' experience in defining, developing and/or implementing EA using TOGAF and/or GWEAF.</p> <p>Provide a copy of a 2 page C.V. for each resource, detailing the relevant experience in years</p> <p>Experience:</p> <table border="1" data-bbox="392 1626 1043 1783"> <thead> <tr> <th>Years' Experience</th> <th>Points awarded</th> </tr> </thead> <tbody> <tr> <td>3 Years</td> <td>10</td> </tr> <tr> <td>&gt;3 to 6 Years</td> <td>15</td> </tr> <tr> <td>&gt; 6 years</td> <td>20</td> </tr> </tbody> </table> <p>The total Architecture resources proposed will be calculated and averaged into a score out of a total of 20 points.</p> <p>Complete the following table:</p> <table border="1" data-bbox="392 1948 1043 2112"> <thead> <tr> <th>Name of resource/s</th> <th>Years of experience</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Years' Experience	Points awarded	3 Years	10	>3 to 6 Years	15	> 6 years	20	Name of resource/s	Years of experience							20	
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<p><b>2.</b></p>	<p><b>Experience of the Support Resources</b></p> <p>All Support Resources for the EA project should have a minimum of 3 years' experience in their area of expertise.</p> <p>Provide a copy of C.V. for the resources detailing the relevant experience.</p> <table border="1" style="width: 100%;"> <thead> <tr> <th>Years' Experience</th> <th>Points awarded</th> </tr> </thead> <tbody> <tr> <td>3 Years</td> <td>3</td> </tr> <tr> <td>&gt;3 to 4 Years</td> <td>5</td> </tr> <tr> <td>&gt; 4 years</td> <td>10</td> </tr> </tbody> </table> <p>The Total Support resources proposed will be calculated and averaged into a score out of a total of 10 points.</p> <p>Complete the following table:</p> <table border="1" style="width: 100%;"> <thead> <tr> <th>Name of resource/s</th> <th>Years of experience</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> </tbody> </table>	Years' Experience	Points awarded	3 Years	3	>3 to 4 Years	5	> 4 years	10	Name of resource/s	Years of experience											10	<b>10</b>
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<p><b>3.</b></p>	<p><b>Project Manager's experience</b></p> <p>The Project Manager must have a minimum of five (5) years project management experience with at least one (1) project establishing or implementing EA.</p> <p>Provide a copy of C.V. for the resource, detailing the relevant experience in years</p> <p>Project Manager's years of experience (maximum score is ten (10) points).</p> <table border="1" style="width: 100%;"> <thead> <tr> <th>Years' Experience</th> <th>Points awarded</th> </tr> </thead> <tbody> <tr> <td>3 Years</td> <td>3</td> </tr> <tr> <td>&gt;4 to 7 Years</td> <td>5</td> </tr> <tr> <td>&gt; 8 years</td> <td>10</td> </tr> </tbody> </table>	Years' Experience	Points awarded	3 Years	3	>4 to 7 Years	5	> 8 years	10	10	<b>10</b>												
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Category	Criteria				Sub-category	Points
	Name of project manager	Years of experience	Score			
4.	<p><b>Proposal</b></p> <p>The bidder must provide a proposal in accordance with the scope of work which shall cover, but not be limited to, the following:</p> <p><b><u>EA capability desired maturity state - Project Implementation Approach</u></b> on the scope of work, deliverables and outputs (<b>5 points</b>)</p> <p><b>Elements:</b> Contains in the proposal an explanation (approach) and details on the scope of work, deliverables and outputs, which translates into sufficient detail. A comprehensive description of the project management and EA methodologies to be used.</p> <p><b>Value Add:</b> Any information in excess to the elements above – not contained above or not contained in scope of work that adds value to proposal, which NHFC did not consider but bidder raised attention to.</p> <ul style="list-style-type: none"> <li>• <b>0 = Poor:</b> Limited content on elements submitted or no level of understanding of the Project Implementation Approach</li> <li>• <b>2 = Satisfactory:</b> Content on elements reasonably meeting some of the requirements or reasonable level understanding on some of the Project Implementation Approach</li> <li>• <b>3 = Good:</b> Content on elements at an extensive level and fully understand the Project Implementation Approach with no value add</li> <li>• <b>5 = Very good:</b> Content on elements at an Exceptional level and fully understand the Project Implementation Approach but with value add</li> </ul> <p><b><u>Provide guidance in implementing the Roadmap to desired maturity state</u></b> - <b>Project Implementation Approach</b> on the scope of work, deliverables and outputs (<b>10 points</b>)</p> <p><b>Elements:</b> Contains in the proposal an explanation (approach) and details on the scope of work, deliverables and outputs, which translates into sufficient detail. A comprehensive description of the project management and EA methodologies to be used.</p> <p><b>Value Add:</b> Any information in excess to the elements above – not contained above or not contained in scope of work that adds value to proposal, which NHFC did not consider but bidder raised attention to.</p> <ul style="list-style-type: none"> <li>• <b>0 = Poor:</b> Limited content on elements submitted or no level of understanding of the Project Implementation Approach</li> </ul>				5	50
					10	

Category	Criteria	Sub-category	Points
	<ul style="list-style-type: none"> <li>• <b>5 = Satisfactory:</b> Content on elements reasonably meeting some of the requirements or reasonable level understanding on some of the Project Implementation Approach</li> <li>• <b>8 = Good:</b> Content on elements at an extensive level and fully understand the Project Implementation Approach with no value add</li> <li>• <b>10 = Very good:</b> Content on elements at an Exceptional level and fully understand the Project Implementation Approach but with value add</li> </ul> <p><b><u>EA As-Is (Current) State - Project Implementation Approach</u></b> on the detailed scope of work Business Architecture, Information Architecture, Data Architecture, Application Architecture and Technology Architecture, Security Architecture <b>(5 points)</b></p> <p><b>Elements:</b> Contains in the proposal an explanation (approach) and details on Business Architecture, Information Architecture, Data Architecture, Application Architecture, Technology Architecture and Security Architecture, which translates into sufficient detail in each Current Architecture. A comprehensive description of the project management and EA methodologies to be used.</p> <p><b>Value Add:</b> Any information in excess to the elements above – not contained above or not contained in scope of work that adds value to proposal, which NHFC did not consider but bidder raised attention to.</p> <ul style="list-style-type: none"> <li>• <b>0 = Poor:</b> Limited content on elements submitted or no level of understanding of the Project Implementation Approach</li> <li>• <b>2 = Satisfactory:</b> Content on elements reasonably meeting some of the requirements or reasonable level understanding on some of the Project Implementation Approach</li> <li>• <b>3 = Good:</b> Content on elements at an extensive level and fully understand the Project Implementation Approach with no value add</li> <li>• <b>5 = Very good:</b> Content on elements at an Exceptional level and fully understand the Project Implementation Approach but with value add</li> </ul> <p><b><u>EA To-Be (Future) - Project Implementation Approach</u></b> on the detailed scope of work Business Architecture, Information Architecture, Data Architecture, Application Architecture, Technology Architecture and Security Architecture using the Design Thinking concept. <b>(10 points)</b></p> <p><b>Elements:</b> Contains in the proposal an explanation (approach) and details using Design Thinking on Business Architecture, Information Architecture, Data Architecture, Application Architecture, Technology Architecture and Security Architecture. A comprehensive description of the project management and EA methodologies to be used.</p>	5	
		10	

Category	Criteria	Sub-category	Points
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Category	Criteria	Sub-category	Points
	<ul style="list-style-type: none"> <li>• <b>8 = Good:</b> Content on elements at an extensive level and fully understand the Knowledge Transfer Plan with no value add</li> <li>• <b>10 = Very good:</b> Content on elements at an Exceptional level and fully understand the Knowledge Transfer Plan but with value add</li> </ul>		
	<b>TOTAL</b>		<b>100</b>

### Phase 3: B-BBEE and Price evaluation

The proposal will be evaluated in terms of the Preferential Procurement Policy Framework Regulations of 2017. Bidders who score a minimum of 70 points will be further evaluated in terms of Price and Preference points (B-BBEE status level of contributor). As per the table below, price is evaluated over 80 points and preference points over 20:

<b>Price Assessment</b>	<b>80 Points</b>
<b>TOTAL</b>	<b>80</b>
Preferential Elements	20 Points
B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

## 11. COMMERCIAL OBLIGATIONS

This section of the document outlines the general commercial process and obligations of the service provider.

### 11.1 Contracting

A contract will be concluded between NHFC and the successful service provider which will incorporate the following:

- The letter of acceptance to the successful bidder
- The original tender documents;
- The proposal of the successful service provider, and
- Terms and conditions as stipulated above and general contract terms and conditions.

## **11.2 Material Rights**

The product of this project will be confidential information, and will be the property of the NHFC and no disclosure of information to other parties will be made without prior written approval of the NHFC.

## **11.3 Rules of Bidding**

- The NHFC reserves the right to amend or cancel this RFP at any time, at its sole discretion;
- The NHFC is not bound to accept any of the proposals submitted, and reserves the right to call for best and final offers from the short-listed bidders before final selection;
- The NHFC reserves the right to call for interviews with short-listed bidders before final selection;
- The NHFC reserves the right to negotiate price and other aspects of the contract with the preferred bidder;
- The NHFC reserves the right not to accept the lowest scoring bid (if applicable) or any bid in part or whole. The NHFC would award a contract to a bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the NHFC.
- An eligible Bidder, if requested, must be prepared to present evidence of experience, ability, service facilities, and financial standing necessary to satisfactorily meet the requirements set forth or implied in this proposal;
- The NHFC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid process. The bidder hereby gives consent to the NHFC to conduct background checks on the bidding entity and any of its directors / partners / trustees / shareholders /members/employees. The NHFC reserves the right to consider the information arising from such background check as part of the tender evaluation process.
- NHFC reserves the right to award a contract in part, to reject any and all quotations in whole or in part, to waive technical defects, irregularities and omissions, at its sole discretion;
- The successful bidder (s) may be required to sign a Service Level Agreement (SLA), in terms of which the service provider's performance will be measured and managed.
- Late submissions will not be considered.

**i. Submission Address**

Proposal, endorsed with **RFP: JS/07/2020** must be hand delivered to:

NHFC Tender Box

The Isle of Houghton

Old Trafford 3, 1st Floor

11 Boundary Road

Houghton

Johannesburg

**Attention: Ms Pumza Nsukwini**

**ii. Copies**

Three hard copies and a soft copy (CD/USB) must be submitted in a sealed envelope, appropriately addressed.

**iii. Submission Date**

The Proposal (technical and financial) must reach the NHFC **by 11h00am on Friday 04 September 2020.**

**iv. Proposal Cost**

The cost of compiling a Proposal is and remains the prospective service provider's own cost and will not be paid for by NHFC.

**v. Contacts**

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