



**REQUEST FOR PROPOSALS APPOINTMENT OF A SUITABLE SERVICE PROVIDER FOR THE PROVISION OF DATA MANAGEMENT SERVICES FOR A PERIOD OF THREE (03) YEARS.**

**RFP NO.: NHBC 08/2022**

**CLOSING DATE: 27 MARCH 2023**

**TIME: 11:00**

<b>VIRTUAL NON-COMPULSORY BRIEFING SESSION</b>
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**DATE: 07 MARCH 2023**

**TIME: 11:00**

**LINK FOR VIRTUAL NON-COMPULSORY BRIEFING SESSION:**

<https://events.teams.microsoft.com/event/7bd5f460-992c-428d-8da5-7ad545ce987d@3fa2c7f2-3ceb-4b67-aec9-08d186f26abc>

**LINK CAN ALSO BE ACCESSED ON THE NHBC website: [www.nhbrc.org.za/current-tenders](http://www.nhbrc.org.za/current-tenders)**

## 1 TERMS AND CONDITIONS

**This Request for Proposal (RFP) has been compiled by the NHBRC and it is made available to the Service providers on the following basis.**

**Service providers submitting a Bid in response to this RFP are deemed to do so, on the basis that they acknowledge and accept the terms and conditions set out below:**

- 1) The Service provider must be registered on the National Treasury's Central Supplier Database ("the CSD") and ensure that, if it is successful, it remains so registered and further ensure that the information on the CSD is up-to-date for the duration of the contract.
- 2) The Service provider must ensure that it is tax compliant at the time of submitting its bid in response to this RFP, and if it is successful, it remains tax compliant for the duration of the contract. In this regard, the Service provider undertakes to provide the NHBRC with a Tax Clearance Certificate issued by the South African Revenue Services ("SARS") on an annual basis, confirming that it is tax compliant.
- 3) The NHBRC reserves the right to amend, modify or withdraw this RFP or amend, modify or terminate any of the procedures or requirements set out herein at any time (and from time to time), without prior notice and without liability to compensate or reimburse any person.
- 4) If the NHBRC amends this RFP, the amendment will be sent to each Service provider in writing or publicized as the case may be. No oral amendments by any person will be considered or acknowledged.
- 5) The NHBRC reserves the right to carry out site inspections or call for supporting documentation to confirm any information provided by a Service provider in its RFP Bid.
- 6) This RFP is not intended to form the basis of a decision to enter into any transaction involving the NHBRC and does not constitute an offer or recommendation to enter into such transaction, or an intention to enter into any legal relationship with any person.
- 7) A Bid submitted in response to this RFP will constitute a binding offer which will remain binding and irrevocable for ninety (90) days from the date of submission to the NHBRC. The offer constituted by the Bid will be deemed not to have been accepted and no agreement will be deemed to be reached with any Service provider, unless and until a binding Agreement and other related transactions/documents are concluded between the NHBRC and the Preferred Service provider.
- 8) The distribution of this RFP outside the Republic of South Africa may be restricted or prohibited by the laws of other countries. Recipients of this RFP are advised to familiarize themselves with and comply with all such restrictions or prohibitions applicable in those jurisdictions, and neither the NHBRC nor any of their respective directors, officers, employees, agents, representatives or advisors, accepts liability to any person for any damages arising out of or in connection with the breach of any restriction or provision outside the Republic of South Africa. Persons contemplating submitting a Bid are advised to obtain legal advice as to the possible consequences thereof in terms of the law of the jurisdictions in which they are located.
- 9) Recipients of this RFP document may only distribute it to other parties whom they wish to involve as part of their Service provider consortium in submitting a Bid.

- 10) Neither the NHBRC nor any of their respective directors, officers, employees, agents, representatives or advisors will assume any obligation for any costs or expenses incurred by any party in or associated with preparing or submitting a Bid in response to the RFP.
- 11) No entity may be involved, whether directly or indirectly, in more than one Bid in response to this RFP. Failure to comply with this requirement may, within the sole discretion of the NHBRC, result in the disqualification of the relevant entity.
- 12) Any material change in the control and/or composition of any Service provider or any core member of a Service provider after submission of a Bid shall require the prior written approval of the NHBRC, and any failure to seek such approval from the NHBRC shall result in the NHBRC being entitled, in its sole discretion, to disqualify the relevant Service provider from any further participation in the Bid process. The NHBRC shall be the sole arbiter as to what constitutes a “material change in the control and/or composition of any Service provider”, and what constitutes a “core member of a Service provider” for purposes of such approval. Any request for such approval shall be made to the NHBRC’s Supply Chain Management (“SCM”) in writing and shall provide sufficient reasons and information to allow the NHBRC to make a decision. The NHBRC reserves the right to accept or reject any such request for approval at its sole discretion.
- 13) Briefing Session: There will be a virtual non-compulsory briefing session. The sharing of information and clarifications of issues related to this Bid, as given by the NHBRC will form part of this Bid and responses.
- 14) Any requirement set out in this RFP that stipulates the form and/or content of any aspect of a Bid is stipulated for the sole benefit of the NHBRC, and save as expressly stated to the contrary, may be waived by the NHBRC in its sole discretion at any stage in the RFP process.
- 15) The NHBRC and its advisors shall rely on a Bid as being accurate and complete concerning the information and proposals provided therein by the Service providers.
- 16) All Bids submitted to NHBRC will become the property of the NHBRC and will as such not be returned to the Service provider. The NHBRC will make all reasonable efforts to maintain proposals in confidence. Proprietary information should be identified as such in each proposal.
- 17) The Bid submitted by the service provider shall be considered irregular if they show any omissions, alteration of form, additions, conditions not called for, or irregularities of any kind. However, the NHBRC reserves the right to waive any irregularities and to make the award in the best interest of the company.
- 18) The NHBRC reserves the right to accept or reject the Proposal.
- 19) RFPs shall be rejected, among other reasons, where Bids are received after the closing date and time as specified in the RFP.
- 20) Potential service provider(s) shall be disqualified and their Bids not considered among other reasons, for any of the following specific reasons:
  - If the SCM Mandatory Documents are not submitted and completed as per this RFP; and/or The Bid contains irregularities.
- 21) The NHBRC reserves the right to require that any service provider provide a formal presentation of its RFP at a date and time to be determined by the NHBRC. The NHBRC shall provide all instructions and clarification regarding the purpose and scope of the presentation. All expenses must be borne by the service provider.

- 22) All costs associated with the preparation and submission of the Bid are the responsibility of the Service provider. The costs shall not be chargeable to the NHBRC by successful or unsuccessful Service providers.
- 23) This document is released for the sole purpose of responding to this RFP and must be considered confidential. In addition, the use, reproduction or disclosure of the requirements, specifications or other material in this RFP is strictly prohibited.
- 24) All Bids must be formulated and submitted under the requirements of this RFP.

## **2 BACKGROUND**

### **2.1. ABOUT THE NHBRC**

The National Home Builders Registration Council (NHBRC) is a regulator established in terms of section 2 of the Housing Consumers Protection Measures Act 95 of 1998 ("the Act"). Section 3 of the Act provides that the objects of the NHBRC are to:

- a) represent the interests of housing consumers by providing warranty protection against defects in new homes;
- b) regulate the home building industry;
- c) provide protection to housing consumers in respect of the failure of home builders to comply with their obligations in terms of this Act;
- d) establish and promote ethical and technical standards in the home building industry;
- e) improve structural quality in the interests of housing consumers and the home-building industry;
- f) promote housing consumer rights and provide housing consumer information;
- g) communicate with and assist home builders to register in terms of this Act;
- h) assist home builders, through training and inspection, to achieve and maintain satisfactory technical standards of home building;
- i) regulate insurers contemplated in section 23 (9) (a); and
- j) in particular, achieve the stated objectives of this section in the subsidy housing sector.

### **2.2. NHBRC OFFICES**

The NHBRC is a medium-sized organization with a staff complement of approximately 600 employees. The NHBRC's Head Office is located in Sunninghill, Gauteng, with nine (09) Provincial Offices of varying sizes and 12 Satellite Offices which are located in the following areas:

	<b>NHBRC OFFICE LOCATIONS</b>	<b>#</b>	<b>NHBRC OFFICE LOCATIONS</b>
1	Head Office, (Sunninghill)	13	Eastern Cape (East London) - Satellite
2	Gauteng (Sunninghill) – Provincial	14	Western Cape (George) - Satellite
3	Kwa-Zulu Natal(Durban) – Provincial	15	North West (Klerksdorp) - Satellite
4	Western Cape (Cape Town) – Provincial	16	Limpopo (Tzaneen) - Satellite
5	Eastern Cape (Port Elizabeth) – Provincial	17	Limpopo (Modimolle) - Satellite
6	North West (Rustenburg) – Provincial	18	Mpumalanga (Witbank) - Satellite
7	Limpopo (Polokwane) – Provincial	19	Free State (Bethlehem) – Satellite

8	Mpumalanga (Nelspruit) – Provincial	20	North West (Mafikeng) – Satellite
9	Free State (Bloemfontein) – Provincial	21	Limpopo (Thulamela) – Satellite
10	Northern Cape (Kimberly) - Provincial	22	Gauteng (Pretoria) – Satellite
11	Kwa-Zulu Natal (Newcastle) - Satellite	23	Eric Molobi Innovation Hub (Soshanguve)
12	Kwa-Zulu Natal (Richards Bay) - Satellite		

### 3 INTRODUCTION

The National Home Builders Registration Council is mandated by the Housing Consumers Protection Measures Act, 1998 (Act No. 95 of 1998) to regulate the home building industry and protect housing consumers. The NHBRC ensures that it delivers on its mandate by delivering on its products and services, and the key performance indicators that are contained in the organisational scorecard.

#### VISION

To be the Champion of the Housing Consumers.

#### MISSION

To Protect the Housing Consumers and to Regulate the Homebuilding Environment.

#### MOTTO

Assuring Quality Homes.

#### STRATEGY OF NHBRC

The strategy of the NHBRC is based on the following pillars:

- To ensure that housing consumers and home builders are educated on their rights and obligations.
- To entrench a culture of compliance through fair and efficient enforcement mechanisms
- To research and introduce innovative products, methods and technologies within the homebuilding industry.
- To maintain a sustainable warranty fund.

## 4 PROJECT TIMELINES

- 4.1 The service provider and the NHBRC will enter into a three (03) years SLA on an effective date to be determined by the parties. The service provider will be required to deploy resources to the NHBRC offices for the duration of the implementation of the project.

## 5 OBJECTIVES

- 5.1 The implementation of data management capabilities is to enable the data-centric organisation and enable NHBRC to introduce innovative products, methods and technologies and enable consistent data flows within and across organizational boundaries.
- 5.2 The following are the objective for the implementation of data management capabilities:
- 5.2.1 Master Data Ownership – enable the identification, consistent definition and classification of NHBRC master data and ownership.
  - 5.2.2 Data Integrity and Reliability – establish the mechanisms to incorporate the relevant data controls within the business processes and systems.
  - 5.2.3 Secured Data Access and Use – enable implementation of appropriate information security controls to maintain the relevant data object security profile at rest, and during movement.
  - 5.2.4 Seamless Data Flow and Fact-Based Decisions – establish appropriate mechanisms to maintain data consistency across business processes, systems and business reports to enable fact-based decision-making.
  - 5.2.5 Consistent Data Lifecycle and Standards – establish data management capabilities to ensure consistent alignment of business processes and systems with the relevant data lifecycle and standards requirements.
  - 5.2.6 Enterprise Analytics – enable the provision of the relevant customer, process and performance analytics to drive consistent business responsiveness and improvement

## 6 SCOPE OF WORKS

- 6.1 The service provider will be responsible for providing the NHBRC with a turnkey solution, which will include the following activities that **MUST** be covered within the scope of this assignment:
- 6.1.1 Assess the environment to develop As-Is and To-Be Data Management Landscape
  - 6.1.2 Data identification, data collection/ extraction, data validation, data cleansing, data aggregation and presentation, data analysis,
  - 6.1.3 Design and development of data asset inventory for all business processes.
  - 6.1.4 Development of a roadmap supporting the implementation of the 'To-Be' Data Management

- 6.1.5 Provide recommendations on the existing Data Architecture based on the data asset inventory identified. This data architecture should provide the infrastructure for the storage, integration, security requirements and use of data throughout the organization.
  - 6.1.6 Implement Shared Data Platform – define platform architecture
  - 6.1.7 Development of the data models to be used, data dictionaries etc. to be documented
  - 6.1.8 Configuration and programming, testing, implementation,
  - 6.1.9 Recommendation and Improvements on the establishment of the centralised data warehouse for the NHBRC.
  - 6.1.10 The Service provider is expected to transfer skills, knowledge and training to the NHBRC Data Team for the duration of the project.
  - 6.1.11 Recommendation on the Data governance structures.
  - 6.1.12 Recommended resourcing structure for a Data Governance Portfolio
  - 6.1.13 Define roles and responsibilities and reporting requirements around Data Governance
  - 6.1.14 Data Management and/or Data Governance Landscape.
  - 6.1.15 Development of an operational and integrated business intelligence system.
- 6.2 The scope of work for the project is divided into the following stages: The deliverable /outcome should include elements listed under section 7 of this document below and more, depending on the outcome of the assessment

OUTCOME	DESCRIPTION
Stage 1 - INITIATION	
<ul style="list-style-type: none"> <li>a. <b>Project Inception Report</b></li> <li>b. <b>Project Charter</b></li> <li>c. <b>Project Plan</b></li> </ul>	<p>This phase of the project must cater for the planning of the project to ensure that the project is adequately planned for and that agreement has been reached between the service provider and the NHBRC in terms of how the project will be executed. The purpose is to clarify the path of the project.</p>
<ul style="list-style-type: none"> <li>d. <b>Data Management and/or Data Governance Gap Analysis Report</b></li> </ul>	<p>The service provider shall be expected to assess the current Data Management practices that are in place and to determine the gap between the current practices to best practices, to be able to establish the improvement in Data Management initiatives required.</p>
Stage 2: DEVELOPMENT OF FRAMEWORK	
<ul style="list-style-type: none"> <li>a. <b>Data Management Framework</b> <ul style="list-style-type: none"> <li>• <b>Reporting Framework</b></li> <li>• <b>Standards and Metadata</b></li> <li>• <b>Data Classification</b></li> </ul> </li> </ul>	<p>This is the critical phase of the project as it seeks to understand the significance of Data at the NHBRC. Data is the digital image of an organization based on which decisions are made.</p>

<ul style="list-style-type: none"> <li>• <b>Business Glossary</b></li> <li>• <b>Data quality rules and metric</b></li> <li>• <b>Data dictionary</b></li> </ul>	<p>The phase focuses on the identification, implementation, maintenance and management strategies for delivering the project. This phase may be conducted in time-boxed “sprints” (Agile) following practices, such as Lean Software Development. Security requirements must be implemented into the Software/System solution. This phase will also focus on overseeing the progress in the implementation of the plan following the Data Management Life Cycle / SDLC methodology and the software design aspect of SWEBOK respectively. And also applying BABOK and DMBOK Guide principles, and evaluating the relationship between the development or operations and the plan to recommend necessary adjustments to the project plan as and when necessary to ensure that the plan is implemented and remains relevant to the developmental needs of the project.</p>
<p><b>Stage 3: SOLUTION IMPLEMENTATION</b></p>	
<ul style="list-style-type: none"> <li>• <b>Shared Data Services</b></li> <li>• <b>Data Governance</b></li> <li>• <b>Data Model</b></li> <li>• <b>Data integration rules</b></li> <li>• <b>Storage and backup</b></li> <li>• <b>Archiving and preservation</b></li> <li>• <b>Pilot and testing activities</b></li> <li>• <b>Compliance, security and information management</b></li> <li>• <b>Data mining capability</b></li> <li>• <b>BI Reports Capability</b></li> </ul>	<p>The service provider will be expected to provide tools and development services to implement a comprehensive shared data platform.</p> <p>The Shared Data Platform will consolidate, analyse and manage data from multiple and varied sources, including transactional data, and structured and unstructured data. It will provide NHBRC with enhanced reporting and analytical capabilities. Data models and design for the shared data platform will combine appropriate data elements from these sources as needed to aid the reporting and alerting functions. Interfaces, Extract, Transform and Load (ETL), source mapping, and user interfaces will be designed and implemented by the Service provider.</p> <p>The proposed architecture must also be flexible enough to allow for the rapid incorporation of new data sources and new functionalities. Service providers must also develop a project plan and cost estimate to develop and implement the proposed architecture.</p>
<p><b>Stage 4: PROJECT CLOSURE</b></p>	
<ul style="list-style-type: none"> <li>• <b>Fully Completed Project Sign-Off Document</b></li> </ul>	<p>The Service provider shall be required to present the key deliverables in two (02) stages; (i) the Project Steering Committee and (ii) the Executive Committee of the NHBRC before the reports are adopted by the NHBRC;</p>

	The Service provider shall be required to initiate a formal sign-off process, which shall indicate the project activities completed, have a provision for sign-off for each stage completed and have a provision for two signatories at both ends (i.e. Service provider and the NHBRC) for final approval of work done.
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**NB: It is expected that the service provider must provide reports or documentation after the completion of each stage.**

**7 REPORTS DELIVERY AND ACCEPTANCE**

- 7.1 All project deliverables of this assignment shall be submitted in both “editable” and “non-editable” forms to the NHBRC.
- 7.2 All deliverables shall be internally reviewed by the service provider before submission to the NHBRC and further subjected to the NHBRC internal review process before adoption.
- 7.3 The NHBRC’s review process shall comprise a three (03) stage review process that comprises (i) the Project Manager; (ii) the Project Steering Committee, and (iii) the NHBRC’s Executive Committee.
- 7.4 The service provider may be required to revise components of reports during the review process, at no additional cost to the NHBRC.

**8 GOVERNANCE FRAMEWORKS AND STANDARDS**

- 8.1 The service provider shall be expected to align the proposed solution with the following Data Governance Practices, IT Data Governance Practices, Framework and Standards:
  - a) King IV Report on Corporate Governance;
  - b) Data Management Body of Knowledge (DMBOK)
  - c) Data Management Life Cycle (DMLC)
  - d) System Development Life Cycle (SDLC)
  - e) Business Analysis Body of Knowledge (BABOK)
  - f) Software Engineering Body of Knowledge (SWEBOK)
  - g) ISO 8000
  - h) ISO 22745
  - i) CoBit 5
  - j) ITIL v4
  - k) ISO 38500
  - l) ISO 20000
  - m) ISO 27001
  - n) the Promotion of Access to Information Act (PAIA)
  - o) the Protection of Personal Information Act (“POPIA”)

## 9 PROJECT DELIVERABLES

- 9.1 The NHBRC expects that the scope of work described in this RFP will include, but is not limited to the following deliverables, most of which will be repeated for each phase or iteration within the phase:
- a) A Project Charter
  - b) Detailed Project Implementation Plan – it must include activities/ tasks, roles and responsibilities, time frames; deliverables, technologies involved inclusive of tools used to complete the data management project, source systems, target tables and migrated data fields.
  - c) Data Governance Gap Analysis Report
  - d) Data Architecture Documentation with Software and Hardware Plan
  - e) Functional and Technical Requirements
  - f) Development Strategy
  - g) Data Management Analysis Report
  - h) Data Security Framework
  - i) Interface Specifications
  - j) Data Plan into Data Lake
  - k) Information Security Plan
  - l) Project Status Report
  - m) Data Integration Plan
  - n) Data Products & Services Framework: A data quality scorecard with initial scores and Data Cleansing Report
  - o) Master Data Management Framework: Business rules and policies, Data dictionary, Business glossary, Roles and responsibility, Data integration rules, Data quality rules and metrics [Metrics and KPIs]
  - p) Data Quality Management Framework
  - q) Reports Review and Adoption Presentations
  - r) Test Plan and Scripts
  - s) Volume /Stress Testing Report
  - t) Training Plan – Skills Transfer - The delivery of user and technical systems operation training. It must outline the following:
    - Necessary/applicable activities
    - Identify NHBRC attendees
    - Provide a training schedule
    - Provide a mechanism for tracking the completion of training
  - u) Business User Manual - To guide NHBRC employees with the functionality and contents of the shared data platform
  - v) Standard reports, Queries and Dashboards
  - w) A formal Project Sign-off.

## 10 KEY ROLE PLAYERS

- 10.1 Data Team
- 10.2 NHBRC Business Units
- 10.3 Business Management Services (IT)
- 10.4 Service Provider

## 11 SERVICE PROVIDER RESPONSIBILITIES

As part of the service expectation the following key elements will be required to be addressed:

- NHBRC working hours are from 8h30 to 16h30, the service provider will be required to work eight (8) hours a day.
- The Service provider must be available as and when required by the NHBRC.
- The Service provider will deploy resources to the NHBRC offices for the duration of the implementation of the project or work remotely as defined by the NHBRC policy
- The Service provider will be expected to provide high-quality work.
- The Service provider will be expected to deliver assigned tasks and daily duties as per the agreed time frames.
- Propose other cost-effective methods of delivering the project as per the NHBRC business requirements, including response to queries within a 24-hour turnaround time.

## 12 FUNCTIONAL EVALUATION CRITERIA

12.1 The bids shall be evaluated functional/ technical in terms of the following criteria:

Functional Factors	Criteria Description
1. Bidders Experience	The service provider <b>MUST</b> have at least <b>five (05) years of experience</b> in supplying and implementing Data Management and Governance Services. Please attach a company profile that includes a list of projects that demonstrate relevant experience in implementing and supporting the proposed Data Management and/or Data Governance Services.
2. Client References	The service provider <b>MUST</b> provide positive written contactable references where Data Management and/or Data Governance Services project was completed The reference letter must be within the last five (05) years The reference letters from the clients of a service provider must include: <ul style="list-style-type: none"> <li>• Company name</li> <li>• Date of project completion</li> <li>• Company Letterhead</li> </ul>

Functional Factors	Criteria Description
	<ul style="list-style-type: none"> <li>• Contact person and contact telephone numbers</li> <li>• The letter must be signed by a duly authorized person</li> </ul> <p><b>NHBRC reserves the right to call the clients to obtain further information</b></p>
3. Qualification of the Project Manager	<p>The service provider <b>MUST</b> provide a Project Manager with <b>at least one of the qualifications listed below (Page 20)</b>, skills and experience in Data Management and/or Data Governance Services.</p> <p>CVs of the project manager must highlight qualifications and areas of experience/ competence in implementing Data Management and/or Data Governance Services. <b>Certified copy of Qualification Must not be older than three (03) months</b></p>
4. Qualification of the Team Members	<p>The service provider <b>MUST</b> provide key Team Members with <b>at least one of the qualification listed below ( Page 21)</b>, skills and experience in Data Management and/or Data Governance Services.</p> <p>CVs of the Team Members must highlight qualifications and areas of experience/ competence in implementing Data Management and/or Data Governance Services. <b>Certified copy of Qualifications Must not be older than three (03) months</b></p>
5. Demo Presentation	<p>A bidder is to present a methodology and implementation approach of the data management and/or data governance services. The tool should provide on-demand and scheduled reports as defined. The following will be assessed:</p> <ul style="list-style-type: none"> <li>• ETL from multiple data sources to Data Lake</li> <li>• Interface connections (SAP/MS Azure/ Oracle)</li> <li>• Operational Reporting</li> <li>• BI dashboard (Executive / Performance Reporting)</li> </ul>

### 13 ELIMINATION CRITERIA

13.1 Proposals that do not meet the stipulated conditions of the NHBRC will be eliminated. Proposals with functional/technical points that are less than a minimum threshold of 80 points will be eliminated from further evaluation.

**14 REPORTING**

- 14.1 The report format will be agreed upon between the service provider and the NHBRC IT Manager.
- 14.2 The service provider shall provide monthly, quarterly, and annual reports to management.

**15 TECHNICAL DATA TO BE SUBMITTED BY THE SERVICE PROVIDER**

**15.1 General Information**

- 15.1.1 The NHBRC requires the services of interested and competent organisations or companies that are experienced in Data Management and/or Data Governance Implementation. The service provider is expected to provide proof of expertise.

<b>Project Manager and Qualification</b>	<p>Has the Proposed project manager previously managed project implementation of at least one Data Management or Data Governance or Business Intelligence Solution of similar scope and complexity within the last five (05) years?</p> <p>Formal education qualification (NQF level 7 in Computer Science, Information Systems, Statistics, Information Technology)</p> <p>Knowledge and Skills:</p> <ul style="list-style-type: none"> <li>• DAMA Certified Data Management Professional (CDMP)</li> <li>• Good understanding of Data Management Body of Knowledge principles from DAMA</li> <li>• Solid Knowledge of architecting solutions in the Cloud services (Azure &amp; AWS),</li> <li>• One or more Data Methodology experience: Data Standards, Data Quality, Data Modeling, Data Profiling, Metadata management, or Master Data Management</li> <li>• Business (Information) analysis and process design</li> <li>• Data (information) governance and regulatory compliance</li> <li>• API's usage to retrieve and update metadata</li> <li>• Governance Landscapes</li> <li>• Business and Technical Analysis Skills</li> </ul> <p>Please provide project managers' Curriculum Vitae to substantiate skill availability.</p>
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<p><b>Team Members Skills and Qualification</b></p>	<p>A matrix of four (04) Team Members Skills demonstrating the support and management team that will be involved in providing services to the NHBRC with their roles and proficiency levels. Key Personnel assigned to this project must have the following skills</p> <ul style="list-style-type: none"> <li>- Database Administrator</li> <li>- Ms Azure Architect</li> <li>- BI Specialist</li> <li>- Data Engineer</li> </ul> <p>Team Members must be qualified experts including the following minimum qualifications:</p> <ul style="list-style-type: none"> <li>• Formal education qualification (NQF level 6) in Computer Science, Information Systems, Statistics, certification)</li> <li>• DAMA Certified Data Management Professional (CDMP),</li> <li>• 2+ years' experience in data engineering and data governance (Essential) with at least two (2) full implementation cycles for the Data Management and/or Data Governance Project</li> <li>• 3+ years' experience in a related field like information technology</li> <li>• Solid Knowledge of architecting solutions in the Cloud services (Azure &amp; AWS),</li> <li>• Exposure to reporting and BI technologies, ETL, JIRA, SSIS, Data Factory or other ETL software SQL and data manipulation</li> <li>• Knowledge of &amp; Scaled Agile Framework (SAFe) practices will be advantageous</li> <li>• Knowledge of GDPR and POPIA (Desired)</li> <li>• User experience with Alteryx, Tableau, SQL Server, SQL Scripting Language Hadoop, and Cloud-based data platform stacks is an advantage</li> </ul>
<p><b>Skills Transfer</b></p>	<p>The service provider to develop a strategy that can be used to accomplish skill development and transfer. The plan includes the resources, staffing, training, methods, milestones and tasks required to accomplish the knowledge transfer. Training materials must be provided during the skills transfer.</p>

**15.2 Requisites of the Service provider:**

- A detailed proposal:
- Understanding of terms of reference.
- Quality Assurance measures (process and control).
- Methodology/process to successfully deliver
- Team composition competencies (please attach CVs and indicate roles of individuals).
- Detailed Pricing Schedule (**Refer to Annexure A**) for the pricing schedule as attached to this document.

**15.3 Summary of projects executed and completed.**

15.4 The following is what is required to be submitted by the service provider.

15.4.1 Positive written contactable references for projects the service provider has completed with regards to Data Management and or Data Governance Services in the last five (05) years. The service provider must submit a summary of the projects in the format presented below:

Name of Project	Project Description	Project Period (Start date – End date)	Contract Value (incl. VAT)	Client Name	Client Contact Tel

Name of project:

  

Name of Client:

  

Client Contact Details

Contact person:

Role in Project:

Contact Tel No:

Contact Cell:

  

Project Start Date:

Project Completion Date:

Contract Amount (incl. VAT):

Summary of Project (maximum 200 words).

**Note: Please attach a reference letter from the client indicating the successful completion of the project as per the client’s brief. (Excluding the NHBC)**

- 15.4.2 Expertise and experience of key personnel
- 15.4.3 The successful service provider will be required to provide the expertise, qualifications and experience to successfully deliver data management services.
- 15.4.4 Suitably qualified and experienced technical personnel must be assigned to this project. Please complete a summary detail of the main Project Team in the format shown below:

**Please complete a summary detail of the main Project Team in the format shown below:**

NO	PROJECTS COMPLETED IN THE LAST FIVE (05) YEARS				
	Full Name	Role in Project	Current Academic Qualifications	Key Area of Specialization	Years of Experience in the industry
1.					
2.					
3.					
4.					
5.					

\*Please attach recently (last 3 months) certified copies of academic qualifications.

**Note**, in addition, please provide the following:

- CV for each of the project team members and project manager, highlighting specific and relevant qualifications and experience.
- Key personnel may only be replaced by personnel with similar expertise over the life of the contract and written permission must be obtained from the NHBRC.

## 16 TECHNICAL AND PRICE EVALUATION CRITERIA

16.1 In accordance with the NHBRC Supply Chain Management Policy, the bid evaluation process shall be carried out in three (03) stages namely:

16.1.1 Stage 1: Compliance check of Mandatory Requirements.

16.1.2 Stage 2: Functional Evaluation Criteria

16.1.3 Stage 3: Price and Preference Points Evaluation

### Stage 1: Compliance check of Mandatory Requirements

DOCUMENTS TO BE SUBMITTED		
No.	Bidders shall take note of the following bid conditions / Mandatory Submissions	Yes/No
1.	Submission of bid in an envelope <b>MUST</b> include one (1) Original hard copy and one (1) memory stick/USB with scanned original documents of the proposal marked (Original hard copy and memory stick/USB) and deposited into the tender box. <b>NB:</b> The Original hard copy submission in the envelope <b>MUST</b> be the same as the electronic copy. <b>(Mandatory)</b>	
2.	SBD1 Invitation to bid <b>MUST</b> be completed and signed, failure to complete will result in the bidder being disqualified. <b>(Mandatory)</b>	
3.	SBD 3.1 - Pricing Schedule (Firm Price) Make sure it is completed	
4.	Annexure A Pricing schedule (including a detailed costing breakdown of all costs and escalation per annum. <b>(Mandatory)</b>	
5.	SBD 4 Bidders Disclosure Form, <b>MUST</b> be completed and signed, failure to complete and sign the document will result in the bidder being disqualified. <b>(Mandatory)</b>	
6.	SBD 6.1 Preference claim form should be completed and signed, regardless if points are claimed or not.	
7.	SBD 7.2 (Contract Form, <b>MUST</b> be completed and signed), failure to complete will result in the bidder being disqualified. <b>(Mandatory)</b>	
8.	The service provider <b>MUST</b> provide valid proof of DAMA certification at the time of the closing of the Tender. <b>(Mandatory)</b> .  <b>NB: Online verification of certification may be conducted.</b>	
9.	Bidder should submit CSD (Central Supplier Database) Report/ MAAA Number	

Note: NHBRC will be using General Conditions of Contract ( GCC) as issued by National Treasury and SLA for the management of the contract

Functionality Evaluation (Stage 2) (Combination of Paper Based and Demo Presentation Evaluation)

- i. **Paper Based Evaluation** – Bidders will be evaluated out of 70 points and bidders are required to achieve minimum threshold of 50 points out of 70 points. Only bidders who achieve a minimum of 50 points or more will be invited for demo presentation evaluation. The Bid Evaluation Committee shall conduct a demo evaluation on the date specified by the Committee.
- ii. **Demo Presentation Evaluation** – Bidders will be evaluated out of 30 points and are required to achieve 30 points out of 30 points.
- iii. The overall combined score for paper based and demo presentation evaluation must be equal to or above 80 points to proceed to Stage 3 for Price and preference points

The bidder's information will be scored according to the following points system:

**Paper Based Evaluation:**

- Details as per the proposal Stage 2: Part 1 - Functionality score 70 Points

**Demo presentation evaluation**

- Details as per the proposal Stage 2: Part 2 - Demo Presentation Evaluation score 30 Points

**COMBINED TOTAL SCORE FOR PART 1 & 2 = 100 POINTS**

**Stage 2: Functionality in terms of the set technical evaluation criteria**

Bids must fully comply with all the Mandatory Requirements for **Stage 1: Compliance check of Mandatory Requirements** to qualify for **Stage 2: Functional Evaluation** and those bids which failed to comply with all the requirements of Stage 2 will be invalidated or disqualified from the process.

The Service providers information will be scored according to the following points systems:

The following values and formulae will be applicable when evaluating the bid

**5=Excellent 4=Very good 3= Good 2= Average 1= Poor 0= Non-compliance**

**Member score for criteria**

**X Weight per criteria = Total Score per criteria**

**Highest points for criteria**

Item No	Evaluation Criteria	Description	Weight (%)
1.	<b>Bidders Experience</b>	<p>The service provider <b>MUST</b> have at least five (05) years of experience in supplying and implementing Data Management and Governance Services. Please attach a company profile that includes a list of projects that demonstrate relevant experience in implementing and supporting the proposed Data Management and/or Data Governance Services.</p> <p><b>Service provider Experience Scoring</b></p> <p>0 Years' Experience = 0 Points            1 Year Experience = 1 Point            2 Years' Experience = 2 Points            3 Years' Experience = 3 Points            4 Years' Experience = 4 Points            5 Years' Experience and more = 5 Points</p>	<b>20</b>
2.	<b>Client References</b>	<p>The service provider <b>MUST</b> provide positive written contactable references where Data Management and/or Data Governance Services project was completed.</p> <p>The reference letter must be within the last five (05) years            The reference letters from the clients of a service provider must include:</p> <p>Company name            Date of project completion            Company Letterhead</p>	<b>15</b>

Item No	Evaluation Criteria	Description	Weight (%)
		<p>Contact person and contact telephone numbers</p> <p>The letter must be signed by a duly authorized person</p> <p><b>Service provider Reference letter Scoring</b></p> <p>0 Reference Letters = 0 Points</p> <p>1 Positive reference Letters = 1 Point</p> <p>2 Positive reference Letters = 2 Points</p> <p>3 Positive reference Letters = 3 Points</p> <p>4 Positive reference Letters = 4 Points</p> <p>5 Positive reference Letters and more = 5 Points</p> <p><b>NHBRC reserves the right to call the clients to obtain further information</b></p>	
3.	<b>Qualification of the Project Manager</b>	<p>The service provider <b>MUST</b> provide Project Manager with <b>at least one of the qualifications listed below</b>, skills and experience in Data Management and/or Data Governance Services.</p> <p>CVs of the Project Manager must highlight qualifications and areas of experience/competence in implementing Data Management and/or Data Governance Services. <b>Certified copy of Qualifications Must not be older than three (03) months</b></p> <p><b><u>Project Manager Must have at least one of the following qualification and experience</u></b></p> <p>NQF level 7 – Bachelor’s degree</p> <ol style="list-style-type: none"> <li>1. Computer Science</li> <li>2. Information Systems,</li> <li>3. Statistics</li> <li>4. Information Technology)</li> </ol> <p><b>Project Manager Scoring</b></p> <p>No experience and/or No qualification = 0 Points</p> <p>3 years’ experience and qualification = 1 Point</p> <p>4 years’ experience and qualification = 2 Points</p> <p>5 years’ experience and qualification = 3 Points</p> <p>6 years’ experience and qualification = 4 Points</p> <p>7 years’ experience qualification and more = 5 Points</p>	20

Item No	Evaluation Criteria	Description	Weight (%)
4	<b>Qualification of the Team Members</b>	<p>The service provider <b>MUST</b> provide <b>four (04)</b> Key Personnel as outlined in 15.1.1 of this document, with <b>at least one of the qualifications listed below</b>, skills and experience in Data Management and/or Data Governance Services.</p> <p>CVs of the project manager must highlight qualifications and areas of experience/ competence in implementing Data Management and/or Data Governance Services.</p> <p><b>Certified copy of Qualifications Must not be older than three (03) months</b></p> <p><b><u>Team Members Must at least have one of the following qualification and experience:</u></b></p> <p>NQF level 6 – National Diploma</p> <ol style="list-style-type: none"> <li>1. Computer Science</li> <li>2. Information Systems,</li> <li>3. Statistics</li> <li>4. Information Technology)</li> </ol> <p>No experience and/or No qualification = 0 Points  1 year experience and qualification = 1 Point  2 years' experience and qualification = 2 Points  3 years' experience and qualification = 3 Points  4 years' experience and qualification = 4 Points  5 years' experience qualification and more = 5 Points</p>	15
<b>SUBTOTAL</b>			<b>70 Points</b>
<b>MINIMUM QUALIFYING REQUIREMENT</b>			<b>50 Points</b>

**NB: Only bidders who score 50 points or more out of 70 points (Part 1) will qualify for Demo Presentation (Part 2)**

**PART 2: Demo Presentation Evaluation**

The demonstration will be undertaken to further validate technical compliance on data management project implementation. Purpose of such a presentation with the bidder, is to provide an opportunity for the bidder to demonstrate the capabilities and understanding to deliver the required services.

5.	<b>Demo Presentation</b>	<p>A bidder is to present a methodology and implementation approach of the data management and/or data governance services. The tool should provide on-demand and scheduled reports as defined. The following will be assessed:</p> <ul style="list-style-type: none"> <li>• ETL from multiple data sources to Data Lake</li> <li>• Interface connections (SAP/MS Azure/ Oracle)</li> <li>• Operational Management Reporting</li> <li>• BI dashboard (Executive / Performance Reporting)</li> </ul> <p><b>Scoring allocation (Demo Presentation)</b></p> <ul style="list-style-type: none"> <li>• Bidders did not meet the requirements listed above on demo presentation = 0 Points</li> <li>• Bidders meet ALL requirements listed above on demo presentation = 5 Points</li> </ul>	<b>30</b>
<b>SUBTOTAL</b>			<b>20 Points</b>
<b>TOTAL FOR PART 1 AND 2</b>			<b>100 Points</b>

**Bidders who score a total of 80 Points on two stages (Paper based and Demo presentation ) will qualify for further evaluation which is Price and Preference points system.**

**The minimum threshold for functionality is 80 points or greater out of 100 points. Bidders who fail to meet minimum threshold will be disqualified and will not be evaluated further for price and preference points.**

### Stage 3: Price and Preference Points Evaluation

Only bids that obtained a minimum qualifying score (**80 points**) for **Stage 2 (Functional Requirements)** will be evaluated further.

The contract will be awarded in terms of Regulations 4 of the Preferential Procurement Regulations about the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000) and Preferential Procurement Regulations, 2022 and bids will be adjudicated in terms of the (80/20) preference points system. Points are awarded to service providers based on the below:

**80/20 Preference point system (for the acquisition of services, works or goods with a Rand value not more than R 50 million) (all applicable taxes included)**

$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where;

$P_s$  = Points scored for the comparative price of the bid or offer under consideration

$P_t$  = Comparative price of the bid or offer under consideration

$P_{min}$  = Comparative price of lowest acceptable bid or offer.

The points scored will be rounded off to the nearest two decimal places.

The points will be awarded to a Bidder in accordance with the table below:

A maximum of 20 points may be awarded to a bidder for Preference Points specified in the tender.

Preference Points	Points Allocated
Women	12
Youth	6
Disabilities	2
<b>TOTAL</b>	<b>20 Points</b>

The following formula must be applied to calculate the number of points for preference points

$$NEP = NOP \times \frac{EP}{100}$$

Where:

NEP = Points awarded for equity ownership Preference Points

NOP= The maximum number of points awarded for Preference Points

EP = The percentage of equity ownership

*The points scored for price will be added to the points scored for preference points to obtain the Bidders total points scored out of 100 points.*

## 17 RFP SUBMISSION INSTRUCTIONS

17.1 All RFP documents **MUST** be sealed in a marked envelope and deposited into the tender box at the **NHBRC HEAD OFFICE: 27 LEEUWKOP ROAD, SUNNINGHILL, JOHANNESBURG.**

## 18 AVAILABILITY OF THE RFP DOCUMENT

18.1 Bid documents can be downloaded on the NHBRC Website ([www.nhbrc.org.za/current-tenders](http://www.nhbrc.org.za/current-tenders)) from **27 February 2023.**

18.2 There will be a **virtual non-compulsory briefing session** that will be held on **07 March 2023 at 11h00.**

18.3 Link for a virtual non-compulsory briefing session: <https://events.teams.microsoft.com/event/7bd5f460-992c-428d-8da5-7ad545ce987d@3fa2c7f2-3ceb-4b67-aec9-08d186f26abc>

## 19 RFP CLOSING DATE

19.1 Bid documents should be marked for Attention: Supply Chain Manager, and deposited into the Bid boxes at the NHBRC National Office, 27 Leeuwkop Road, Sunninghill on or before **27 March 2023 at 11h00.** No emailed or faxed Bids will be accepted. The bid document should be supplied in a sealed envelope clearly **marked ( one (1) Original hard copy and one (1) Memory Stick / USB with scanned original documents)** with the bid number and the full name of the service provider(s).

19.2 No late submissions will be accepted.

## 20 VALIDITY PERIOD OF BIDS

20.1 All bids submitted by the service providers must be valid for 90 days from the closing date specified above.

## 21 ENQUIRIES SHOULD BE DIRECTED TO BOTH:

21.1 The administrative enquiries may be directed to:

**Department:** Supply Chain Management

**Contact Person:** Ms.Paballo Relela, Mr.Bernard Kekana

**E-mail address:** [Tenders@nhbrc.org.za](mailto:Tenders@nhbrc.org.za)

## 22 SUBMISSIONS OF PROPOSALS

- 22.1 Submission of bid in an envelope **MUST** include **one (1) Original hard copy and one (1) memory stick/USB with scanned original documents of the proposal marked (Original hard copy and memory stick/USB) and deposited into the tender box. NB: The Original hard copy submission in the envelope MUST be the same as the electronic copy Failure to comply will result in the bid being regarded as unacceptable.**
- 22.2 All costs and expenses incurred by the Service provider relating to the participation in and preparation of this proposal process shall be borne by the Service provider exclusively. All documentation and manuals submitted in respect of this RFP shall be retained by NHBRC, whether or not the proposal is accepted.

## 23 POPIA

- 23.1 The NHBRC is committed to adhere to the Protection of Personal Information Act 4 of 2013 and the Promotion of Access to Information Act 2 of 2000. To this end the NHBRC has published its Information Manual on its website, which regulates the manner in which NHBRC processes information.
- 23.2 The NHBRC requires the information requested in bids for the purpose set out in paragraph 2.5 of the Manual. Further the Manual confirms that NHBRC processes the information requested in bids from prospective service providers and third parties at paragraph 3.4.
- 23.3 Bidders should note that the NHBRC is committed to securing all the information submitted from bidders, in terms of paragraph 6 of the Manual. (included on the NHBRC website)
- 23.4 Bidders are in turn required to comply with the tender requirements and when the information of third parties are required by NHBRC, bidders are by law required to obtain the consent of such third parties for the sharing of such third parties' information with the NHBRC. "

## 24 ANNEXURE: A DETAILED PRICING SCHEDULE

Pricing Table: Bidders must comply with the following requirement when calculating their price. **Note: All prices must be inclusive of VAT.**

Project Stage	Year 1	Year 2	Year 3	Total
Stage1: Project Initiation				
Stage 2: Development Of Framework				
Stage 3: Solution Implementation				
Stage 4: Project Closure				
Support				
Skills Transfer				
<b>Total cost for three (03) years (Incl VAT)</b>				

### NB: PRICE

All prices charged should be inclusive of VAT. The bid proposal should indicate the total price bid.

### PRICE ADJUSTMENTS

Bidders must take note that firm prices will be accepted for the first twelve (12) months of the contract duration, thereafter a once-off price adjustment on the 13<sup>th</sup> month and 25<sup>th</sup> month will be accepted based on the average CPI % as issued by STATS SA.

**NB: The Service provider should carry their own travel and accommodation costs (if any).**