REQUEST FOR QUOTATION (RFQ)

RFQ NUMBER: NHFC010638

REQUEST FOR QUOTATION (RFQ) FOR: CONSOLIDATED CRM SUPPORT AND MAINTENANCE FOR TWELVE (12) MONTHS.

RFQ DOCUMENTS CHECK LIST:

The contents of the RFQ document must be numbered as per the numbering below, converted to a pdf file and submitted via email before the closing date. Please complete the checklist below to verify your submission of the relevant documents:

Schedules	Description	Submitted – Indicate YES or NO
Annexure 1	Tax Compliance Status Pin	
Annexure 2	Copies of Company Registration Documents	
Annexure 3	Copy of Valid B-BBEE certificate or Sworn Affidavit.	
Annexure 4	Current Central Supplier Database Report Copy	
Annexure 5	SBD 1: Invitation to Bid	
Annexure 6	Pricing Schedule	
Annexure 7	SBD 4: Bidder's Disclosure	
Annexure 8	SBD 6.1: Preference Point Claim Form in Terms of Preferential Procurement Regulations 2022	
Annexure 9	Identity Document of Directors	
Annexure 10	Signed or Initialised General Conditions of Contract (GCC)	

SECTION 1

SBD 1 INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE NHFC SOC LTD.					
BID NUMBER:	NHFC010638	CLOSING DATE:	13 November 2026	CLOSING TIME:	11:00AM
DESCRIPTION	**CONSOLIDATED CRM SUPPORT AND MAINTENANCE FOR TWELVE (12) MONTHS.**				

BID RESPONSE DOCUMENTS MAY BE EMAILED TO:
Quotations02@nhfc.co.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Ms Kamogelo Dagane	CONTACT PERSON	Ms Kamogelo Dagane
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER	N/A	FACSIMILE NUMBER	
E-MAIL ADDRESS	Quotations02@nhfc.co.za	E-MAIL ADDRESS	Quotations02@nhfc.co.za

SUPPLIER INFORMATION				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA

B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] Yes No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] Yes No

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	Yes No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	Yes No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? YES NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? YES
NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?
☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?
☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? YES NO ☐
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.

1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.

1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.

2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.

2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.

2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.

2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:……

CAPACITY UNDER WHICH THIS BID IS SIGNED: ……
(Proof of authority must be submitted e.g. company resolution) DATE:……...

SECTION 2

NOTICE TO BIDDERS

1. RESPONSES TO RFQ

Responses to this RFQ [**Quotations]** must not include documents or reference relating to any other quotation or proposal. Any additional conditions must be embodied in an accompanying letter.

Proposals must reach NHFC before the closing hour on the date shown on SBD1 above, and must be e- mailed to **quotations02@nhfc.co.za**

2. PREQUALIFICATION / ELIGIBILITY CRITERIA

2.1 Only those Bidders who satisfy the following pre-qualification or eligibility criteria are eligible to submit quotations as per section 3.

3 COMMUNICATION

Bidder/s are warned that a response will be liable for disqualification should any attempt be made either directly or indirectly to canvass any SCM Officer(s) or NHFC employee in respect of this RFQ between the closing date and the date of the award of the business.

4 LEGAL COMPLIANCE

The successful Bidder shall be in full and complete compliance with any and all applicable national and local laws and regulations.

5 CHANGES TO QUOTATIONS

Changes by the Bidder to its submission will not be considered after the closing date and time.

6 PRICING

All prices must be quoted in South African Rand on a fixed price basis, including VAT if applicable.

7 BINDING OFFER

Any Quotation furnished pursuant to this Request shall be deemed to be an offer. Any exceptions to this statement must be clearly and specifically indicated.

8 RFQ Conditions

- This RFQ is subject to the Preferential Procurement Policy Framework Act 2000, the Preferential Procurement Regulations, 2022, the general conditions of contract (GCC) and, if applicable, any other legislation or special conditions of contract.
- The lowest or any bid will not necessarily be accepted.
- NHFC reserves the right to reject submitted proposal if deemed necessary. Should it be

discovered by the NHFC that the bidder did not act in good faith and/or has declared incorrectly/falsely, NHFC reserves the right to disqualify or reject the bid.

- The NHFC reserves the right to disqualify a bid proposal if the bidders' proposal is not compliant with the scope of work/terms of reference.
- The bidder is subjected to due-diligence process which includes, screening, vetting, and/or any best practice necessary for the NHFC to comply with legislation and its Policies and Procedures. Due diligence and PEP checks will also be conducted on the successful bidder.
- The NHFC reserves the right to disqualify a bid if the bidder fails to provide reasonable request (s) for documentation/information which the NHFC deems necessary for the purpose of evaluation within reasonable timelines this includes the set deadline per request,
- Bid rigging/collusive behaviour by the bidder will result in disqualification. A bidder is not permitted to submit proposal from more than one registered company with a common director/shareholder.
- The NHFC deems the Bidder has read and accepted the General Conditions of Contract.
- Bidders must submit the bid a soft copy of the RFQ via email. The soft copy serves as the legal bid contract document and the master record between the bidder and the NHFC.
- The NHFC undertakes to pay out within 30 days from issuance of substantiated invoices issued in terms of this appointment (Payment schedule as defined in the service level agreement). No payment will be made on outstanding information not submitted by the service provider. Service provider must maintain an updated tax compliant status for the during of the contract.
- The cost of compiling a Proposal is and remains the prospective service provider's own cost and will not be paid for by NHFC.
- The successful bidder (s) will be required to sign a Service Level Agreement (SLA), in terms of which the service provider's performance will be measured and managed.
- NHFC has zero tolerance for reputational harm. 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.

- The NHFC reserves the right to reject submitted proposal(s) if it discovers that the bidder (or its directors/members) has any serious adverse reports, whether confirmed by a court or not, such as:
    - Being cited as aiding and abetting state capture,
    - Involvement in fraud and / or corrupt activities;
    - Misrepresenting audit outcomes of an organisation;
    - Listed on the National Treasury restricted database;
    - Being under investigation or facing allegations that may result in criminal charges; or
    - Any report as a result of which the NHFC may suffer reputational harm in any way by doing business with the bidder.

9 NATIONAL TREASURY'S CENTRAL SUPPLIER DATABASE

Bidders are required to self-register on National Treasury's Central Supplier Database (CSD) which has been established

to centrally administer supplier information for all organs of state and facilitate the verification of certain key supplier information. NHFC is required to ensure that price quotations are invited and accepted from prospective bidders listed on the CSD. Business may not be awarded to a bidder who has failed to

register on the CSD. Only foreign suppliers with no local registered entity need not register on the CSD. The CSD can be accessed at https://secure.csd.gov.za.

10 PROTECTION OF PERSONAL DATA

In responding to this RFQ, NHFC acknowledges that it may obtain and have access to personal data of the Bidders. NHFC agrees that it shall only process the information disclosed by Bidders in their response to this bid for the purpose of evaluating and subsequent award of business and in accordance with any applicable law.

Furthermore, NHFC will not otherwise modify, amend or alter any personal data submitted by Bidders or disclose or permit the disclosure of any personal data to any Third Party without the prior written consent from the Bidders. Similarly, NHFC requires Bidders to process any personal information

disclosed by NHFC in the bidding process in the same manner.

11 EVALUATION METHODOLOGY

NHFC will utilize the evaluation criteria indicated in this document criteria in choosing a Supplier/Service Provider.

12 ADMINISTRATIVE RESPONSIVENESS

The test for administrative responsiveness will include completeness of response and whether all returnable and/or required documents, certificates; warranties and other RFQ requirements and formalities have been complied with. Incomplete Bids may be disqualified.

13 VALIDITY PERIOD

NHFC requires a validity period of 60 Business Days from the closing date.

Bidders are to note that they may be requested to extend the validity period of their response, on the same terms and conditions, if the internal processes are not finalized within the validity period. However, once the adjudication body has approved the process and award of the business to the successful Bidder(s), the validity of the successful Bidder(s)' response will be deemed to remain valid until a final contract has been concluded.

14 RETURNABLE DOCUMENTS

Returnable Documents means all the documents, Sections and Annexures, as listed in the tables below. There are three types of returnable documents as indicated below and Bidders are urged to ensure that these documents are returned with the quotation based on the consequences of non-submission as indicated below:

15 Mandatory Returnable Documents

Failure to provide all these Mandatory Returnable Documents at the Closing Date and time of this RFQ will result in a Bidder's disqualification. Bidders are therefore urged to ensure that all these Documents are returned with their Quotations.

16. UNSUCCESSFUL BIDDERS

Should the bidder not receive any communication from NHFC within the validity of the RFQ. The bidder should consider their bid unsuccessful

SECTION 3

SPECIFICATIONS

CONSOLIDATED CRM SUPPORT AND MAINTENANCE FOR TWELVE (12) MONTHS.

1. BACKGROUND

The NHFC is a public entity listed as Schedule 3A of the Public Finance Management Act (PFMA) of 1999 (as amended). The entity was established by the National Department of Human Settlements (NDOHS) as a development finance institution (DFI) in 1996, with the mandate of broadening access to affordable housing for the low- and middle-income households. NHFC as a national public entity adheres to the regulatory framework of the Public Finance Management Act (PFMA) of 1999.

The NHFC operates largely as a wholesale funder providing funding in the affordable housing market through a network of clients that include social housing institutions, property developers and investors, and contractors as well as non-banking financial retail intermediaries. In addition, it facilitates national implementation of a housing subsidy programme on behalf of the Department of Human Settlements which is focused on providing a subsidy for aspiring first-time homeowners, known as the First Home Finance Programme. The entity also provides programme management services to augment capacity of provincial and local government in the implementation of various housing programmes. The company operates nationally mostly through intermediaries operating in the four (4) main financing channels, namely, the residential developer financing channel, the Social Housing institution /Other Delivery Agents (ODAs) financing channel, the contractor financing channel as well as the incremental housing intermediary financing channel. In addition to providing loans to its intermediary partners, the company also provides other forms of funding in the form of strategic investments such as equity and quasi equity to certain niche businesses in the affordable housing value chain.

2. PURPOSE

The National Housing Finance Corporation SOC Ltd (NHFC) relies on business-critical systems to support lending operations, customer relationship management, grant administration, workflow automation, reporting and related operational processes. The Sage CRM-based solutions, including the Grant Facilitation System, Web Portal and associated Loan Management Systems (LMS), form an integral part of NHFC’s technology environment and require appropriate support, maintenance and enhancement services to ensure their continued reliability, availability and alignment with evolving business requirements.

Given the critical nature of these systems, NHFC seeks to ensure that adequate technical capability, system knowledge and responsive support capacity are maintained to minimise operational and technology risks. This includes ensuring timely incident resolution, continuity of specialised system knowledge, effective system maintenance and the capacity to implement enhancements required to support changing business needs.

As a State-Owned Entity, NHFC is committed to procuring goods and services through fair, transparent and competitive processes while promoting value for money. NHFC therefore intends to approach the market through a competitive bidding process to appoint a suitably qualified and experienced service provider with the requisite technical expertise and capacity to support, maintain and enhance the relevant systems.NHFC is a development finance institution operating within the human settlements sector. Its Information and Communications Technology function supports the organisation through technology governance, business systems, infrastructure, information security and related ICT services.

NHFC intends to invite proposals from suitably qualified and experienced service providers for the support, maintenance, enhancement and knowledge transfer of its Sage CRM and Loan Management Systems environment. The procurement seeks to ensure continuity and resilience of mission-critical business systems, strengthen access to specialised technical expertise, facilitate effective knowledge transfer, promote competitive procurement and value for money, and secure the capability required to maintain and enhance the systems throughout the contract period.

The purpose of this bid is to appoint a competent service provider that will ensure reliable, secure and sustainable support for the in-scope systems. The appointed provider will be required to:

•Provide ongoing application support and maintenance.
•Resolve incidents, defects, service requests and recurring problems.
•Perform corrective, adaptive, preventive and perfective maintenance.
•Assess and implement approved enhancements through NHFC change control.
•Maintain relevant technical, operational and user documentation.
•Transfer knowledge to NHFC personnel and reduce key-person dependency.
•Support transition, business continuity and orderly contract exit.

3. OBJECTIVE AND SCOPE

The Objectives of the Support and Maintenance services are:

- Ensure continuity and stability of support for the in-scope systems.
- Improve availability, reliability, performance and security.
- Provide responsive incident, problem and service request management.
- Implement approved enhancements in a controlled and auditable manner.
- Maintain current documentation and a usable knowledge repository.
- Develop NHFC internal capability through structured knowledge transfer.
- Establish measurable accountability through service levels and reporting.
- Enable an orderly transition at commencement and at contract exit.

3.1 Background and Business Need

NHFC has deployed Sage CRM-based solutions and associated Loan Management Systems to support key business processes, including the Grant Facilitation System. These systems comprise custom screens, workflows, reports, back-end functions and integrations that require specialist technical and functional support. The First Home Finance CRM system includes a web portal that supports the grant application and disbursement processes. The portal enables applicants and authorized users to:

- Submit grant applications;
- Upload supporting documentation;
- Initiate payment requisitions; and
- Provide the documents required for each applicable disbursement scenario.

The First Home Finance Web Portal is an integral customer-facing component of the First Home Finance solution and must remain available, secure and fully integrated with the underlying Sage CRM environment throughout the contract period. The appointed service provider will therefore be required to support and maintain the complete portal service, including applicant registration and authentication, electronic form submission, document upload and storage, workflow routing, validation rules, notifications, payment-requisition processing, audit trails and the interfaces through which portal information is transferred to the relevant back-office processes. Support must include the investigation and resolution of incidents and defects; monitoring of portal availability, performance and failed transactions; controlled implementation of

approved configuration changes and enhancements; safeguarding of applicants' personal information through appropriate access controls and secure data handling; maintenance of current technical and user documentation; and timely escalation of any vulnerability, integration failure or service interruption that may affect the processing or disbursement of First Home Finance applications. Any change to the portal must be assessed, tested, approved and deployed in accordance with NHFC's change-management, information-security and release-management requirements to protect data integrity, service continuity and the user experience.

3.1.1 Business Need, Risk Mitigation and Continuity of Operations

The Sage CRM and LMS platforms support critical operational processes within NHFC and therefore require a reliable and sustainable support and maintenance model. Inadequate support may result in delayed incident resolution, service disruptions, unresolved defects, increasing technical debt, reduced ability to implement approved business changes and loss of critical technical knowledge.

NHFC seeks to mitigate operational, technical, continuity and knowledge-dependency risks by establishing a structured service model with clearly defined service levels, appropriate technical capability, comprehensive documentation, effective knowledge transfer and clearly defined transition and exit arrangements.

A competitive procurement process will enable NHFC to assess available market capability and obtain value for money while securing a suitably qualified and experienced service provider capable of supporting, maintaining and enhancing these business-critical systems. This will contribute to system stability, service continuity and the continued effective operation of business units that depend on the CRM and LMS platforms.

3.1.2 Strategic Alignment

The proposed procurement aligns with NHFC's objective of maintaining a stable, secure and efficient technology environment that supports the delivery of housing finance programmes, and related developmental initiatives. The appointment supports ICT governance by ensuring that critical systems remain adequately supported, technology risks are proactively managed, institutional knowledge is retained, and technology investments continue to deliver value to the organization and its stakeholders.

The procurement also supports the principles reflected in the NHFC ICT Project Management Framework, including clear business justification, requirements definition, planning, governance, controlled change, testing, deployment and handover to production support. The final tender and resulting contract should remain aligned to applicable NHFC SCM, ICT governance, information security, records management and change control requirements.

3.2 NHFC Product Offering

All loans must have a facility to allow for moratoriums on repayments of capital, interest or both. These may be loaded on initiation of the loan, or as part of a restructuring later. The table below provides a list of NHFC Product Offerings:

- **Table A**

Product Offering	Description	Loan Type
Bridging finance	• Short term loan term from 3 months to 1 year • Interest rate linked to prime • Facility fees • Disbursement fees • Penalty interest chargeable for late payments • Maximum loan amount and maximum disbursements need to be recorded • Loan amount is disbursed in more than one payment, each of which has a term. • Usually secured by a certificate of completion	Senior Loan with straight-line amortisation
Long term mortgages	• Long term loan up to 30 years • Interest rate linked to prime or JIBAR • Penalty interest charged on late payments • Facility fees • Disbursement fees • Maximum exposure amount set • Loan amount is disbursed in more than one payment, with the total loan having a term • Usually secured by a first covering mortgage bond.	Senior Loan with straight-line amortisation
Wholesale loans	• Term from 1 to 5 years • Interest rate linked to prime or JIBAR • Facility fees • Disbursement fees • Penalty interest chargeable for late payments • Maximum loan amount and maximum disbursements need to be recorded • Loan amount is disbursed in more than one payment, each of which has a term. • Usually secured by a cession of debtors' book and bank account	Senior Loan with straight-line amortisation
Grant Facilitation	• First Home Finance is a housing subsidy programme available to qualifying South African citizens who are purchasing a residential property for the first time. It is intended to improve access to home ownership for eligible applicants by providing financial assistance towards the acquisition of their first home, subject to the applicable programme criteria, affordability assessment and approval requirements.	Subsidy Grant administration

3.2.1 Product categories

The following are the current product categories, any of whom may use any type of loan. New categories may be added from time to time.

a. Social Housing: NPC;
b. Social Housing: ODA;
c. Private Rental Housing- Open Market;
d. Private Rental Housing- Student Accommodation;
e. Affordable Housing;
f. Subsidy Housing; and
g. Incremental Lending.

The NHFC also has a Grant Facilitation division that provides a Subsidy Grant product referred to as First Home Finance.

3.3 CRM-LMS Application and Product Landscape

This information is provided to assist bidders in understanding the current business and application landscape within the scope of the required support and maintenance services:

- Confirmed inventory of Sage CRM, LMS and Grant Facilitation modules, versions, environments and custom components.
- Ownership and availability of source code, licenses, credentials, technical documentation and development tools.
- Complete list of integrations, interfaces, scheduled jobs and third-party dependencies.
- Our databases are SQL based ranging from SQL Server 2012 v11.0 to SQL Management studio version v18- 18.12.1 2012
- The Sage CRM versions in the environment range from Sage CRM 7.3 SP3 To CRM 2024 R2
- Certain existing CRM versions are dependent on specific SQL Server versions. Consequently, upgrades to the CRM environment may require the underlying server and SQL infrastructure to be upgraded to compatible versions.

The table below provides an overview of the Sage CRM-LMS application environment and the corresponding NHFC product offerings supported by these applications.

- **Table B**

Product Offering	Current System	Software Platform	Integration
Affordable Housing	LMS-CRM	Sage CRM	Vodacom Bulk SMS API
First Home Finance	CRM	Sage CRM	
First Home Finance Web Portal	CRM back- end	Sage CRM	
CRM (Marketing)	CRM	Sage CRM	
Retail LMS (No New Business)	LMS-CRM	Sage CRM	FNB Fintegrate for collections

3.4 Scope of Work

The scope of services covers NHFC's applicable Sage CRM and Loan Management Systems environment, including associated applications, interfaces, databases and supporting environments. The service provider's scope shall provide the following services.

3.4.1 Application support

- Provide Level 1 and Level 2 application support, with clear escalation and collaboration arrangements for Level 3 support.
- NHFC's internal Application Support Engineers will provide Level 1 application support. The service provider shall provide Level 2 application support and, where required, facilitate escalation to Level 3 support.
- The service provider shall clearly define the scope and responsibilities of Level 1, Level 2 and Level 3 support, including the incident classification, diagnostic activities, resolution responsibilities, escalation criteria and handover points between each support level. Clear collaboration and escalation arrangements between NHFC's internal Application Support team and the service provider shall be established to ensure efficient incident resolution and service continuity.
- Log, classify, prioritize, investigate, resolve and close incidents and service requests.
- Provide remote and, where approved, on-site support.
- Maintain an auditable ticket history and communicate progress to authorized stakeholders.

3.4.2 Corrective and problem maintenance

- Diagnose and correct application defects, failed jobs, workflow errors, reporting defects and integration failures.
- Perform root-cause analysis for significant or recurring incidents.
- Implement permanent fixes through approved release and change processes.

3.4.3 Preventive and perfective maintenance

- Conduct scheduled application health checks and review logs, capacity, performance and recurring errors.
- Recommend optimization, housekeeping, security and technical-debt remediation activities.
- Maintain supported configurations and advise NHFC of material lifecycle or compatibility risks.

3.4.4 Adaptive maintenance

- Assess and implement changes required by approved business, legislative policy, infrastructure, security or integration changes.
- Provide impact assessments, estimates, designs, testing evidence and implementation plans.

3.4.5 Enhancements and change requests

- Analyze approved enhancement requests and provide effort, cost, timeline, risk, dependency and resource estimates.
- Prepare functional and technical specifications where required.
- Develop, configure, test, deploy and document approved changes.
- Support user acceptance testing and post-implementation stabilization.

3.4.6 System administration and security support

- Support authorized user, role, permission, workflow, report, scheduler and configuration administration.
- Apply least privilege principles and maintain evidence of authorized changes.
- Support vulnerability remediation and security investigations relevant to the applications.

3.4.7 Integration support

- Support and maintain existing interfaces between Sage CRM, LMS, Online Portal and approved NHFC or third-party systems.
- Monitor and troubleshoot interface failures, APIs, scheduled transfers, notifications and data exchanges.
- Document interfaces, dependencies, credentials ownership and recovery steps without exposing secrets in operational documents.

3.4.8 Database and data support

- Provide specialist Microsoft SQL Server application database support, including performance analysis, integrity checks, query optimization and restoration assistance.
- Investigate data anomalies and execute approved data corrections using controlled, logged and reversible procedures.
- Support authorized data extracts, migrations and reconciliations.

3.4.9 Release, testing and deployment

- Use NHFC-approved development, test, user acceptance and production processes.
- Provide release notes, test evidence, rollback plans, deployment checklists and implementation records.
- Obtain required approvals before production changes.

3.4.10 Documentation and knowledge management

- Create, validate and maintain architecture diagrams, environment inventories, configuration records, interface catalogues, technical designs, support procedures, user guidance and recovery procedures.
- Store agreed artefacts in an NHFC-controlled repository and maintain version history.

3.4.11 Knowledge transfer

- Provide a knowledge transfer plan with topics, participants, frequency and measurable outcomes.
- Conduct walkthroughs, shadowing, technical sessions and administrator training.
- Provide recordings or training materials where approved by NHFC.

3.5 Deliverables and Reporting

- **Table C**

Deliverable	Minimum content	Frequency / due point
Transition plan and baseline assessment	System inventory, risks, dependencies, access, knowledge gaps and takeover plan	At commencement
Service management report	Tickets, SLA performance, ageing, recurring issues, changes, risks, capacity and recommendations	Monthly
Major incident report	Timeline, impact, actions, cause, corrective actions and owners	After each major incident
Health-check report	Application, database, integration and operational health findings	Quarterly or as agreed
Change and release pack	Approved requirement, design, tests, release notes, rollback and sign-off	Per approved release
Knowledge transfer report	Sessions, attendance, materials,	Quarterly

Deliverable	Minimum content	Frequency / due point
	outcomes and gaps	
Updated documentation	Current architecture, configuration, procedures and relevant user guidance	Continuous and at each release
Exit pack	Current artefacts, outstanding matters, access closure and handover evidence	At contract exit

3.6 Transition and Exit Management

3.6.1 Transition-in

- Submit a detailed transition plan within the period specified by NHFC.
- Review available system, configuration, source code, support history and operational documentation.
- Conduct knowledge-harvesting sessions with NHFC and, where contractually permissible, the incumbent provider.
- Validate access, environments, integrations, contact points, escalation routes and support procedures.
- Maintain service continuity and record transition risks, dependencies and mitigations.
- Provide a transition acceptance report for NHFC approval.

3.6.2 Transition-out and contract exit

- Prepare and maintain an exit plan from the start of the contract.
- Transfer current documentation, configuration records, source code, scripts, credentials through secure NHFC-approved channels, ticket history and outstanding work registers.
- Cooperate with NHFC and any successor provider for an orderly handover.
- Revoke supplier access and return or securely dispose of NHFC information at contract end.
- Provide written confirmation of completed exit obligations.

3.6.3 Monthly support hours

The maximum monthly support hours needed for the SLA is **70 hours**.

4. Contract Term

The service provider will be required to enter into and sign a Service Level Agreement (SLA) with NHFC. The appointment will be for a period of twelve (12) months on an as-and-when-required basis commencing from the date of finalisation and signing of the SLA. The duration of contract will be based on performance, which will be assessed on a quarterly basis and reviewed on a quarterly basis.

RETURNABLE DOCUMENTS

SECTION 4

EVALUATION CRITERIA

Evaluation of bids received will be conducted in Three (03) phases as follows:

Phase 1 – Administrative Compliance Requirements

This stage checks and validates the bidders' compliance to the legal requirements to conduct business in South Africa, as well as to the industry requirement for the supply of goods and services. All SBDs must be submitted (signed) noting where it is not applicable. If any specific SBD is not submitted, documentary proof, clearly stating the reason must be attached.

No.	Description of requirement	
a)	Company Registration Documents	
b)	Copies of Directors' ID documents;	
c)	Valid BBBEE Certificate from a SANAS accredited rating agency (Original or Certified) or affidavit signed by the Commissioner of Oath	
d)	Valid Tax Clearance Certificate (must be valid on closing date of submission of the proposal) and SARS Issued Pin	
e)	CSD report / CSD reference number	
f)	Pricing Schedule: SBD 3.3: Pricing Schedule is mandatory and must be submitted as part of the bid response. Bidders who fail to submit SBD 3.3 will be disqualified. Where a bidder does not complete the pricing schedule provided in SBD 3.3, the bidder must submit a separate pricing schedule that aligns with NHFC's requirements and must sign SBD 3.3 as an acknowledgement of the pricing requirements.	Mandatory
g)	SBD1: Invitation to bid	
h)	SBD 4: Bidders disclosure	
i)	SBD 6: Preference Point Claim Form in Terms of Preferential Procurement Regulations 2022	
j)	Signed or Initialised General Conditions of Contract (GCC)	

NB: if the bidder failed to comply with any of the Administrative Compliance Requirements, or if the NHFC is unable to verify whether the Administrative Compliance Requirements are met, then the NHFC reserves the right to:

- Accept the bid for evaluation on condition that the bidder submits within 7 working days any supplementary information to achieve full compliance with Administrative Compliance Requirements.
- All forms, annexures and addendums shall be signed and completed and returned with the Bid Document as a whole. The lowest or any Bid will not necessarily be accepted.

PHASE 2 – FUNCTIONALITY EVALUATION CRITERIA

- Supporting material must be provided for the elements below.
- Only bidders scoring a minimum of **70 points out of 100 points** on functional evaluation criteria will be considered for price and specific goals evaluation.

Technical Functionality	Total Points
Section 1: Technical Capabilities	**20 points**

Technical Capability Criteria	Requirement Description	Submission Type	Points
Application support	• Provide Level 1 and Level 2 application support, with clear escalation and collaboration arrangements for Level 3 support. • Log, classify, prioritize, investigate, resolve and close incidents and service requests. • Provide remote and, where approved, on-site support. • Maintain an auditable ticket history and communicate progress to authorized stakeholders. . ❖ All Application support requirements are met – 2 points. ❖ Not all Application support requirements are met – 0 points.	Information	2 Points
Corrective and problem maintenance	• Diagnose and correct application defects, failed jobs, workflow errors, reporting defects and integration failures. • Perform root-cause analysis for significant or recurring incidents. • Implement permanent fixes through approved release and change processes. ❖ All Corrective and problem maintenance support requirements are met – 2 points. ❖ Not all Corrective and problem maintenance support requirements are met – 0 points.	Information	2 Points
Preventive and perfective maintenance	• Conduct scheduled application health checks and review logs, capacity, performance and recurring errors. • Recommend optimization, housekeeping, security and technical-debt remediation activities. • Maintain supported configurations and advise NHFC of material lifecycle or compatibility risks. ❖ All Preventive and perfective maintenance support requirements are met – 2 points. ❖ Not all Preventive and perfective maintenance support requirements are met – 0 points.	Information	2 Points
Adaptive maintenance	• Assess and implement changes required by approved business, legislative policy, infrastructure, security or integration changes. • Provide impact assessments, estimates, designs, testing evidence and implementation plans. ❖ All Adaptive maintenance support requirements are met – 2 points. ❖ Not all Adaptive maintenance support requirements are	Information	2 Points

	met – 0 points.		
Enhancements and change requests	• Analyze approved enhancement requests and provide effort, cost, timeline, risk, dependency and resource estimates. • Prepare functional and technical specifications where required. • Develop, configure, test, deploy and document approved changes. • Support user acceptance testing and post-implementation stabilization. ❖ All Enhancements and change requests support requirements are met – 2 points. ❖ Not all Enhancements and change requests support requirements are met – 0 points.	Information	2 Points
System administration and security support	• Support authorized user, role, permission, workflow, report, scheduler and configuration administration. • Apply least privilege principles and maintain evidence of authorized changes. • Support vulnerability remediation and security investigations relevant to the applications. ❖ All System administration and security support requirements are met – 2 points. ❖ Not all System administration and security support requirements are met – 0 points.	Information	2 Points
Integration support	• Support and maintain existing interfaces between Sage CRM, LMS, Online Portal and approved NHFC or third-party systems. • Monitor and troubleshoot interface failures, APIs, scheduled transfers, notifications and data exchanges. • Document interfaces, dependencies, credentials ownership and recovery steps without exposing secrets in operational documents. ❖ All Integration support requirements are met – 2 points. ❖ Not all Integration support requirements are met – 0 points.	Information	2 Points
Database and data support	• Provide specialist Microsoft SQL Server application database support, including performance analysis, integrity checks, query optimization and restoration assistance. • Investigate data anomalies and execute approved data corrections using controlled, logged and reversible procedures. • Support authorized data extracts, migrations and reconciliations. ❖ All Database and data support requirements are met – 2 points. ❖ Not all Database and data support requirements are met – 0 points.	Information	2 Points
Release, testing and deployment	• Use NHFC-approved development, test, user acceptance and production processes. • Provide release notes, test evidence, rollback plans, deployment checklists and implementation records. • Obtain required approvals before production	Information	2 Points

	changes. ❖ All Release, testing and deployment support requirements are met – 2 points. ❖ Not all Release, testing and deployment support requirements are met – 0 points.		
Non-Functional Requirements	All CRM-LMS systems in the organization must always meet non-functional requirements outlined in Section 4.8, including performance, scalability, reliability, usability, maintainability, and availability. ❖ All non-functional requirements are met – 2 points. ❖ Some non-functional requirements are met – 1 point. ❖ Non-functional requirements are not met – 0 points.	Information	2 Points

Section 2: Company Reference Letters	**15 Points**

The bidder must demonstrate organisational capability relevant to the scope. The bidder must provide:

- Demonstrable experience supporting and maintaining Sage CRM or comparable enterprise CRM environments with custom workflows, reports, online portals and integrations.
- Demonstrable experience supporting loan management, financial services, development finance or other comparable business-critical systems.
- Evidence of completed contracts of similar nature, scale and complexity.
- A service management methodology, escalation model, quality controls and continuity arrangements.
- Capacity to provide the required technical and functional resources throughout the contract.

Bidders must submit five (5) client reference letters, in the bidder's name, for work successfully completed within the past five (5) years, where the scope and complexity are similar to the services required in this bid. Reference letters for work completed before 30 April 2019 will not be considered compliant.
Each reference letter must be on the client's official letterhead and must include all of the following:

- Letter date
- Client name on official client letterhead
- A clear description of the services rendered
- Client's details, including name and contact details
- The Client's signature and date

NB: Reference letters that do not include an expanded description of the services rendered will be regarded as non-compliant with the required criteria.

NHFC will contact the referees as part of the due diligence process. If a referee does not respond within seven (7) working days from the date of NHFC's request for confirmation, the reference letter will be deemed invalid and will score zero.

Criteria	Points
Submission of five (5) written reference letters.	15
Submission of four (4) written reference letters.	12

Submission of three (3) written reference letters.	9
Submission of two (2) written reference letters.	6
Submission of one (1) written reference letter.	3
No reference letters submitted.	0

Section 3: Proposed Methodology and Service Model	**20 Points**

The bidder must submit a detailed **Methodology and Service Model** demonstrating how it will deliver the support, maintenance and enhancement services required for the Sage CRM-LMS environment.

The methodology must demonstrate a clear understanding of the required services and provide a practical, structured and sustainable approach to managing the environment throughout the contract period.

Evaluation Area	What NHFC Will Assess	Required Submission Format	Score Allocation
Support and Maintenance Methodology	A clearly defined methodology for delivering application support and corrective, preventive, adaptive and enhancement maintenance. The methodology should explain how incidents, service requests, recurring problems and system enhancements will be managed from initiation through resolution and closure.	No methodology or relevant information provided = 0 Points **Poor:** Response is materially inadequate and does not demonstrate a workable approach = **1 Point** **Fair:** A basic approach is provided, but important elements are insufficiently addressed = **2 Points** **Good:** A clear and practical approach addressing the requirement is provided = **3 Points** **Very Good:** A comprehensive and well-structured approach is provided, with clear processes, responsibilities and controls = **4 Points** **Excellent:** A highly detailed, practical and integrated methodology is provided, supported by clearly defined processes, controls, outputs and service-management mechanisms = **5 Points**	**5 points**
Incident Management and Escalation Model	A structured process for logging, categorising, prioritising, assigning, escalating, resolving and closing support incidents, including defined escalation paths and responsibilities for critical or unresolved incidents.		**4 points**
Service Delivery	The proposed operating model for providing		**3 points**

and Resource Model	the service, including allocation of technical and functional resources, support coverage, communication channels, responsibilities and coordination with NHFC ICT stakeholders.		
Change, Release and Quality Management	A controlled methodology for implementing fixes and enhancements, including impact assessment, development/configuration, testing, UAT support, release management, production deployment, rollback and post-implementation support.		**3 points**
Monitoring, SLA Management and Reporting	Approach to monitoring service performance, tracking incidents and service requests, managing SLA performance, identifying recurring issues and providing regular operational/service reports to NHFC.		**3 points**
Service Continuity and Knowledge Management	Approach to maintaining service continuity, system documentation, technical knowledge and knowledge sharing to minimise reliance on individual resources and enable effective support throughout the contract.		**2 points**
TOTAL			**20 Points**

NB: A bidder that fails to submit a methodology and service model, fails to use the required milestone format, or submits a schedule that is not aligned to the Section 4 deliverables, and the period may score zero for this section.

Section 3: Experience of Personnel	**36 points**
This criterion assesses the qualifications, skills, and experience of the personnel proposed to provide the required services. The bidder's proposed personnel must possess relevant qualifications, technical skills, and demonstrated experience aligned to the scope of work for the support and maintenance of the in-scope systems. Bidders are required to provide complete information for the proposed **Service Delivery Manager, Sage CRM Technical Consultant / Developer, LMS Functional / Technical Consultant, Database Specialist, and Integration Specialist** by fully completing the Provider Form (refer to pages 20 to 23 of the bid document). For each proposed team member, bidders must submit an abridged curriculum vitae (CV), together with certified copies of all qualifications listed. The information provided must be consistent, complete, and sufficient to demonstrate the suitability of each proposed resource for the role identified. ***(Must attach copies of qualifications and CV's).*** **Foreign qualifications must be accompanied by a valid SAQA verification letter/certificate where applicable. Failure to submit the required SAQA documentation will result in the foreign qualification not being considered for evaluation.** The proposed resources must demonstrate relevant experience in the development, implementation, and/or maintenance of the bidder's proposed system, with clear alignment to the required scope of work. NHFC reserves the right to verify qualifications and certifications. For international qualifications, direct contact details (including the contact person's name, email address, phone number, and physical address) enable the NHFC to: • Verify authenticity of the certificates and qualifications • Confirm the scope and relevance of the qualification to the services required in the bid. • Ensure the institution itself is accredited by the relevant authorities in its home country. Failure to provide these complete and accurate contact details may lead to the bid being	

marked as incomplete or rejected, as it prevents the necessary due diligence by the NHFC.

Note:

- The NHFC reserves the right to verify the authenticity of all OEM certifications submitted. Should any certification be found to be invalid, inaccurate, or misrepresented, the bidder will be disqualified and excluded from further evaluation.
- All CVs submitted must clearly indicate the start and end dates of each project, the role performed by the proposed resource, and the specific duties and activities undertaken. The information provided must clearly demonstrate alignment with the requirements of this project and be sufficiently detailed to substantiate the experience claimed. CVs containing gaps, inconsistencies, or ambiguities will not be accepted.
- The Roles of all the Key Personnel, as listed below, need to be clearly identified Failure to do so this section will not be scored and will be allocated a score of zero

Resource	Name	CV attached with qualification
Service Delivery Manager		
Sage CRM Technical Consultant / Developer		
LMS Functional / Technical Consultant		
Database Specialist		
Integration Specialist		
Business Analyst		

Service Delivery Manager:

8 points

The CV of the Service Delivery Manager must demonstrate relevant experience in managing the support and maintenance of enterprise software solutions similar in scope and complexity to the systems in the scope of the NHFC environment. The Service Delivery Manager must show the ability to lead support and maintenance related contracts, coordinate business and technical workstreams, manage project risks and dependencies, and oversee successful support and maintenance of the CRM-LMS systems environment of NHFC.

Qualification	Points
Degree (NQF Level 7) or higher in Information Technology or Equivalent	2 Points

Experience	Points
The Service Delivery Manager has led seven (7) or more similar projects involving support and maintenance of enterprise software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	6 Points
The Service Delivery Manager has led four (4) to six (6) similar projects involving the development, implementation, and/or maintenance of enterprise software solutions similar in scope and complexity to the consolidated systems support and	4 Points

maintenance environment and scope of work of NHFC.		
The Service Delivery Manager has led one (1) to three (3) similar projects involving the development, implementation, and/or maintenance of enterprise software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	2 Points	
No relevant demonstrated experience in managing similar projects aligned to the consolidated systems support and maintenance environment and scope of work of NHFC.	0 Points	

Sage CRM Technical Consultant / Developer — **7 points**

The CVs of the **Sage CRM Technical Consultant / Developer** must demonstrate relevant experience in the Sage CRM configuration, customization, workflows, reports, APIs and troubleshooting, development, implementation, and/or maintenance of software solutions similar in scope and complexity to the NHFC systems in scope of the support and maintenance. The proposed Sage CRM Technical Consultant / Developer must show experience in system configuration, coding, integration, testing support, deployment, and resolution of technical issues within enterprise application environments. ***Must submit both specified qualifications below to be eligible for full points.***

Qualification	Points
National Diploma or higher in Information Technology or Equivalent	3 Points
Sage OEM Technical Specialist Certificate	

Experience	Points
The proposed Sage CRM Technical Consultant / Developer have collectively demonstrated experience in four (4) to six (6) similar projects involving the support, development, implementation, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	4 Points
The proposed Sage CRM Technical Consultant / Developer have collectively demonstrated experience in one (1) to three (3) similar projects involving the development, implementation, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	2 Points
No relevant experience demonstrated by the proposed Sage CRM Technical Consultant / Developer in the development, implementation, and/or maintenance of similar solutions aligned to the consolidated systems support and maintenance environment and scope of work of NHFC.	0 Points

LMS Functional / Technical Consultant — **7 Points**

The CV of the LMS Functional / Technical Consultant must demonstrate relevant

experience in Loan-management processes, application support, defects, configuration, enhancements, system testing, user acceptance support, defect management, and quality assurance for the development, implementation, and/or maintenance of systems similar in scope and complexity to the bidder's proposed system. ***Must submit both specified qualifications below to be eligible for full points.***

Qualification	Points
B Degree NQF Level 7 or higher in Information Technology or Equivalent	3 Points
Sage OEM Technical Specialist Certificate	

Experience	Points
The proposed LMS Functional / Technical Consultant has demonstrated experience in four (4) to six (6) similar projects involving development, configuration, software testing, quality assurance, implementation, production support, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	4 Points
The proposed LMS Functional / Technical Consultant has demonstrated experience in one (1) to three (3) similar projects involving development, configuration, software testing, quality assurance, implementation, production support, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	2 Points
No relevant experience demonstrated by the proposed LMS Functional / Technical Consultant in development, configuration, software testing, quality assurance, implementation, production support, and/or maintenance of systems aligned to the consolidated systems support and maintenance environment and scope of work of NHFC.	0 Points

Database Specialist — **7 Points**

The CVs of the **Database Specialist** must demonstrate relevant experience in the Sage CRM Microsoft SQL Server support, performance, integrity and controlled data work, and/or maintenance of software solutions similar in scope and complexity to the bidder's proposed system. The proposed Database Specialist must show experience in system configuration, coding, integration, testing support, deployment, and resolution of technical issues within enterprise application environments. ***Must submit both specified qualifications below to be eligible for full points.***

Qualification	Points
National Diploma or higher in Information Technology or Equivalent	3 Points
OEM Technical Specialist Certificate	

Experience	Points
The proposed Database Specialist have collectively demonstrated experience in four (4) to six (6) similar projects involving the development, implementation, support, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and	4 Points

maintenance environment and scope of work of NHFC		
The proposed Database Specialist have collectively demonstrated experience in one (1) to three (3) similar projects involving the development, implementation, support, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	2 Points	
No relevant experience demonstrated by the proposed Database Specialist in the development, implementation, support, and/or maintenance of similar solutions aligned to the consolidated systems support and maintenance environment and scope of work of NHFC.	0 Points	

Integration Specialist — **7 Points**

The CVs of the **Integration Specialist** must demonstrate relevant experience in the Sage CRM APIs, interfaces, scheduling, messaging and secure data exchange, development, implementation, and/or maintenance of software solutions similar in scope and complexity to the bidder's proposed system. The proposed Integration Specialist must show experience in system configuration, coding, integration, testing support, deployment, and resolution of technical issues within enterprise application environments. ***Must submit both specified qualifications below to be eligible for full points.***

Qualification	Points
National Diploma or higher in Information Technology or Equivalent	3 Points
OEM Technical Specialist Certificate	

Experience	Points
The proposed Integration Specialist have collectively demonstrated experience in four (4) to six (6) similar projects involving the development, implementation, integration, support, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	4 Points
The proposed Integration Specialist have collectively demonstrated experience in one (1) to three (3) similar projects involving the development, implementation, integration, support, and/or maintenance of software solutions similar in scope and complexity to the consolidated systems support and maintenance environment and scope of work of NHFC.	2 Points
No relevant experience demonstrated by the proposed Integration Specialist in the development, implementation, integration, support, and/or maintenance of similar solutions aligned to the consolidated systems support and maintenance environment and scope of work of NHFC.	0 Points

Section 4: Skills Transfer — **9 points**

The bidder must provide a comprehensive Skills Transfer Plan demonstrating how skills and knowledge will be transferred to enable Practical approach, output and post-support monitoring solution. The bidder must Create, validate and maintain architecture diagrams, environment inventories, configuration records, interface catalogues, technical designs, support procedures, user guidance and recovery procedures. The bidder must store agreed artefacts in an NHFC-controlled repository and maintain version history. The bidder must provide a knowledge transfer plan with topics,

participants, frequency and measurable outcomes. The service provider must conduct walkthroughs, shadowing, technical sessions and administrator training and provide recordings or training materials where approved by NHFC.

The Skills Transfer Plan must include, at a minimum, As-Is documentation and hands-on labs / solution walkthroughs covering the following topics:

- **As-Is System Landscape Documentation**
  - Documentation of the current NHFC Loan Management Systems environment
  - Documentation of existing business processes
  - Documentation of current Grant administration process
- **Solution Architecture and Configuration**
  - End-to-end solution architecture (logical and physical)
  - Configuration of LMS functionality
  - Configuration of CRM Functionality
  - Configuration of Web Portal

Hands-on labs must allow NHFC ICT officials to practically configure, execute, monitor, troubleshoot and be able to independently perform Support and Maintenance of Sage CRM-LMS Systems in the environment processing in a test or sandbox environment aligned to NHFC use cases.

Criteria	Weight	Comprehensive	Good	Basic	Poor / Non-Compliant
Skills Transfer, Capacity Building & Sustainability *(Refer to Skills Transfer Requirements – Consolidated Support and Maintenance of Sage CRM-LMS Systems)*	**9**	A detailed and structured Skills Transfer Plan is provided, including comprehensive As-Is documentation and hands-on labs / practical solution walkthroughs covering all required topics, including the existing LMS landscape, Sage CRM-LMS, configuration, integrations, reporting, audit trails, and system support. Clearly demonstrates enablement of four (4) NHFC ICT officials to independently configure, monitor, support, and sustain independently	Skills Transfer Plan provided with As-Is documentation and hands-on labs, but some required Sage CRM-LMS Systems, configuration, integration, reporting, or support topics are partially covered, or sustainability and independent support capability is not fully demonstrated.	Skills Transfer Plan provided but limited to As-Is documentation only or very high-level knowledge transfer, with minimal or no hands-on labs and limited practical enablement of NHFC ICT officials.	No Skills Transfer Plan provided, or submission does not adequately address skills transfer, capacity building, or sustainability requirements.
		8 – 9 Points	**5 – 7 Points**	**1 – 4 Points**	**0 Points**
Threshold					**70 Points**
Total					**100 points**

Phase 3 - Price and Preference Evaluation

As the bid price is estimated to be below R50 million, the bid responses will be evaluated on the 80/20-point system.

As per the table below, price is evaluated over 80 points and preference points over 20:

	Price		**80 points**
	Specific Goals		**20 points**
#	**Specific Goal**	**Proof**	**Points Allocation**
1	South African citizen who had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act 200 of 1983) or the Constitution of the Republic of South Africa, 1996. (Minimum >50% ownership or more)	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**6**
2	Woman Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**8**
3	Disabled Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number) • Certified medical certificate from a registered medical practitioner	**1**
4	Youth Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**5**

SBD 3.3

PRICING SCHEDULE

(Professional Services)

NAME OF BIDDER: .....BID NO.: NHFC010638

CLOSING TIME 11:00am CLOSING DATE: 13 November 2026

OFFER TO BE VALID FOR 60 BUSINESS DAYS FROM THE CLOSING DATE OF BID.

ITEM DESCRIPTION **BID PRICE IN RSA CURRENCY**

NO(ALL APPLICABLE TAXES INCLUDED)**

1. **The accompanying information must be used for the formulation of proposals.**

2. **Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R……..……**

Item	Description of Deliverable	Unit	Estimated Quantity	Unit Rate (excl. VAT)	Total Price (excl. VAT)
1	Transition-in and initial system assessment, including familiarisation with the supported systems, review of the existing environment and identification of immediate support priorities.	Once-off	1		
2	Compilation and/or validation of the system inventory, technical documentation and support baseline for the systems.	Once-off	1		
3	Quarterly reporting	Quarterly	4		
4	Knowledge transfer	Once-off	1		
5	Transition-out and handover	Once-off	1		
6	Support and maintenance services (Total hours for the 12 months duration)	Hourly	840		
SUBTOTAL (VAT Excl)					
VAT @ 15%					
GRAND TOTAL INCLUDING (VAT Incl..)					

RETURNABLE DOCUMENT

SECTION 5

NHFC GENERAL CONDITIONS OF PURCHASE

General

NHFC and the Supplier enter into an order/contract on these conditions to supply the items (goods/services/works) as described in the order/contract.

Conditions

These conditions form the basis of the contract between NHFC and the Supplier. Notwithstanding anything to the contrary in any document issued or sent by the Supplier, these conditions apply except as expressly agreed in writing by NHFC.

No servant or agent of NHFC has authority to vary these conditions orally. These general conditions of purchase are subject to such further special conditions as may be prescribed in writing by NHFC in the order/contract.

Local Content Obligations

Bidders are to note that the Local Content commitments made by the successful Bidder(s) will be incorporated as a term of the contract and monitored for compliance. Should the successful Bidder fail to meet its Local obligations, non-compliance penalties shall be applicable. Breach of Local Content obligations also provide NHFC cause to terminate the contract in certain cases where material non-compliance with Local Content requirements are not achieved.

Price and payment

The price or rates for the items stated in the order/contract may include an amount for price adjustment, which is calculated in accordance with the formula stated in the order/contract.

The Supplier may be paid in one currency other than South African Rand. Only one exchange rate is used to convert from this currency to South African Rand. Payment to the Supplier in this currency other than South African Rand, does not exceed the amounts stated in the order/contract. NHFC pays for the item within 30 days of receipt of the Suppliers correct tax invoice.

Delivery and documents

The Supplier's obligation is to deliver the items on or before the date stated in the order/contract. Late deliveries or late completion of the items may be subject to a penalty if this is imposed in the order/contract. No payment is made if the Supplier does not provide the item as stated in order/contract.

Where items are to be delivered the Supplier:

Clearly marks the outside of each consignment or package with the Supplier's name and full details of the destination in accordance with the order and includes a packing note stating the contents thereof; On dispatch of each consignment, sends to NHFC at the address for delivery of the items, an advice note specifying the means of transport, weight, number of volume as appropriate and the point and date of dispatch; Sends to NHFC a detailed priced invoice as soon as is reasonably practical after dispatch of the items, and states on all communications in respect of the order the order number and code number (if any).

Containers / packing material

Unless otherwise stated in the order/contract, no payment is made for containers or packing materials or return to the Supplier.

Title and risk

Without prejudice to rights of rejection under these conditions, title to and risk in the items passes to NHFC when accepted by NHFC.

Rejection

If the Supplier fails to comply with his obligations under the order/contract, NHFC may reject any part of the items by giving written notice to the Supplier specifying the reason for rejection and whether and within what period replacement of items or re-work are required.

In the case of items delivered, NHFC may return the rejected items to the Supplier at the Supplier's risk and expense. Any money paid to the Supplier in respect of the items not replaced within the time required, together with the costs of returning rejected items to the Supplier and obtaining replacement items from a third party, are paid by the Supplier to NHFC.

In the case of service, the Supplier corrects non-conformances as indicated by NHFC.

Warranty

Without prejudice to any other rights of NHFC under these conditions, the Supplier warrants that the items are in accordance with NHFC's requirements, and fit for the purpose for which they are intended, and will remain free from defects for a period of one year (unless another period is stated in the Order) from acceptance of the items by NHFC.

Indemnity

The Supplier indemnifies NHFC against all actions, suits, claims, demands, costs, charges and expenses arising in connection therewith arising from the negligence, infringement of intellectual or legal rights or

breach of statutory duty of the Supplier, his subcontractors, agents or servants, or from the Supplier's defective design, materials or workmanship.

The Supplier indemnifies NHFC against claims, proceedings, compensation and costs payable arising out of infringement by the Supplier of the rights of others, except an infringement which arose out of the use by the Supplier of things provided by NHFC.

Assignment and sub-contracting

The Supplier may not assign or subcontract any part of this order/contract without the written consent of NHFC.

Termination

NHFC may terminate the order/contract at any time (without prejudice to any right of action or remedy which has accrued or thereafter accrues to NHFC):

If the Supplier defaults in due performance of the order/contract, or if the Supplier becomes bankrupt or otherwise is, in the opinion of NHFC, in such financial circumstances as to prejudice the proper performance of the order/contract, or for any other reason in which case the Supplier will be compensated for all costs incurred.

Governing law

The order/contract is governed by the law of the Republic of South Africa and the parties hereby submit to the non- exclusive jurisdiction of the South African courts.

SECTION 6

SBD 4

RETURNABLE DOCUMENT

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise, employed by the state? **YES/NO**

If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	**Identity Number**	**Name of State institution**

Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

If so, furnish particulars:

……

……

Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?
YES/NO

If so, furnish particulars:

……

……

3. DECLARATION

I, the undersigned, (name)….....in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM

INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

…… …….

Signature Date

…… ……

Position Name of bidder

RETURNABLE DOCUMENT

SECTION 7

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

1.2 the 80/20 system for requirements with a Rand value up to R50 000 000 (all applicable taxes included); and

1.3 To be completed by the organ of state

(*delete whichever is not applicable for this tender*).

a) The applicable preference point system for this tender is the 80/20 preference point system.

1.4 The 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.5 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

(a) Price; and

(b) Specific Goals.

1.6 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	**100**

1.7 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.8 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

2.1 **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

2.2 **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

2.3 **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

2.4 **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(a) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

80/20

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 points is allocated for price on the following basis:

80/10

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 80/20 or 90/10 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	**Supporting evidence for meeting preferential procurement targets (bidder to provider the below supporting evidence to claim allocated points for each specific goal)**	**Number of points allocated (80/20 system) (To be completed by the organ of state)**	**Number of points claimed (80/20 system) (To be completed by the tenderer)**
South African citizen who had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act 200 of 1983) or the Constitution of the Republic of South Africa, 1996. (Minimum >50% ownership or more)	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**6**	
Woman Ownership >50%	• Company Registration Certification (CIPC)	**8**	

	• Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)		
Disabled Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number) • Certified medical certificate from a registered medical practitioner	**1**	
Youth Ownership >50%	• Company Registration Certification (CIPC) • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)	**5**	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.1. Name of company/firm…….

4.2. Company registration number: ……...

4.3. TYPE OF COMPANY/ FIRM

□ Partnership/Joint Venture / Consortium
□ One-person business/sole propriety
□ Close corporation
□ Public Company
□ Personal Liability Company
□ (Pty) Limited
□ Non-Profit Company
□ State Owned Company
[TICK APPLICABLE BOX]

4.4. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct;

4.5. The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

4.6. In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor

may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

4.7. If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....

.....

.....