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## ATTACHMENT 1

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### APPOINTMENT OF A SERVICE PROVIDER FOR THE SUPPLY OF A HUMAN RESOURCES INFORMATION MANAGEMENT SYSTEM (HRIS) WITH A MAINTENANCE AND SUPPORT AGREEMENT OF 5 YEARS

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#### 1. Specifications

The terms of reference/specifications for the proposed bid is specified in Annexure C. The mandatory requirements for the proposed solution are in Annexure A, and the evaluation criteria for this bid is in Annexure B.

#### 2. Evaluation of the Bids

The received bids will be evaluated on the **80/20** procurement principle as per the Supply Chain Management Policy and the relevant Treasury Regulations. The bid will be subjected to four (4) phases: **Phase 1**. Mandatory screening for compliance with the compulsory requirements, **Phase 2**. Functionality screening, **Phase 3**. Price and BBBEE and **Phase 4**. Live demonstration of user experience by the top three bidders based on both phase 2 and 3 combined scores. **Note that the top 3 bids will be considered as phase 4 evaluation is also scored and the final scoring could change based on the user experience as demonstrated.**

#### 3. Content Bid Functionality

Only bidders who passed the cut-off of **70/100** for functionality screening will be evaluated further for price and BBBEE.

**ANNEXURE A:**  
**PHASE 1: MANDATORY REQUIREMENTS**

The following are the mandatory requirements for this tender.

No	Minimum criteria	Yes	No
1.	Does the proposed system have a recruitment module, with the ability to advertise on the internet and accept applications online?		
2.	Does the proposed system have an integrated payroll module?		
3.	Does the proposed system have a performance management module?		
4.	Does the proposed system have a leave management module?		
5.	Does the proposed system have an employee self-service module?		
6	Has the service provider been providing HR system (implementation and support) for a minimum of five (5) years?		

**If the bidder does not comply with any of the above, the bid will be disqualified.**

**ANNEXURE B:**  
**PHASE 2: EVALUATION CRITERIA**

**SERVICE PROVIDER**

This section evaluates the service provider's reliability, experience, reputation, profitability and sustainability.

QUESTION	WEIGHT	RATING	NOTES
<p>Reference letters/confirmation letters for which similar work was undertaken during the past five (5) years. This shall include the following information:</p> <ul style="list-style-type: none"> <li>○ Client name;</li> <li>○ Contact name and telephone number;</li> <li>○ Successful completion date of the project; and</li> <li>○ Detailed description of services delivered.</li> </ul> <p><b>Reference Letters must be submitted on a letterhead of the client.</b></p> <p>No references provided = <b>1</b>            One (1) reference provided = <b>2</b>            Two (2) references provided = <b>3</b>            Three (3) references provided = <b>4</b>            Four (4) references provided = <b>5</b></p>	20		

## FUNCTIONALITY

This section is intended to evaluate the service provider's ability to support ICASA with its HR and payroll activities. The different modules are grouped and scored as follows:

GROUPS OF FUNCTIONALITIES FOR SCORING	WEIGHT	SCORE	NOTES
<p>With regards to requirements C1 - C20 in Annexure C</p> <ul style="list-style-type: none"> <li>• If 121-130 requirements complied with (5)</li> <li>• If 111-120 requirements complied with (4)</li> <li>• If 101-110 requirements complied with (3)</li> <li>• If 91-100 requirements complied with (2)</li> <li>• If 90 or less requirements complied with (1)</li> </ul>	70		

**PHASE 4: USER EXPERIENCE**

<b>GROUPS OF FUNCTIONALITIES FOR SCORING</b>	<b>WEIGHT</b>	<b>SCORE</b>	<b>NOTES</b>
<p>User Experience as indicated in Annexure D</p> <ul style="list-style-type: none"> <li>• If 10 requirements complied with (5)</li> <li>• If 8 – 9 requirements complied with (4)</li> <li>• If 5 - 7 requirements complied with (3)</li> <li>• If 2 - 4 requirements complied with (2)</li> <li>• If less than 2 requirements complied with (1)</li> </ul>	10		

**ANNEXURE C:  
SYSTEM REQUIREMENTS (SCOPE OF WORK)**

**C1. Recruitment**

Does the System Help with the Following HR Activities?	Complies		NOTES
	Yes	No	
• Initiating request to recruit?			
• Processing request to hire			
• Job advertising with internal and external options			
• Integrates with social media sites			
• Pre-screening			
• Short Listing			
• Interview scheduling			
• Assessment testing scheduling			
• Offer and regret letters			
• Onboarding selected employee			
<b>Total Score</b>	<b>10</b>		

**C2. Payroll**

Does the System Help with the Following Payroll Activities?	Complies		NOTES
	Yes	No	
• Overtime calculations and reporting			
• Garnishment management			
• Employee payslip portal			
• Employee IRP5 portal			
• Contractor management			
• Bonus Management global implementation			
• Incentives Management			
• Salary increases for Employees global implementation			
• Allows for manual checks to be printed onsite			
• Compatible with SARS Easyfile system			
• Provides the capability to re-run selected steps of the payroll process.			
<b>Total Score</b>	<b>11</b>		

**C3. Performance Management and OD**

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
• Enables employee contracting			
• Solicit performance feedback from line manager			
• Employees can complete self-evaluations.			
• Managers can provide performance feedback.			
• Send e-mail reminders and overdue notices throughout the process.			
• Uploading performance evidence by the employees			
• Agree on the performance			
• Moderation management (HR can change the performance scores based on a re-evaluation of evidence)			
• Employees, managers or administrators can easily access historical performance reviews.			
• Progress tracking on completion			
• Generate performance reports			
<b>Total Score</b>	<b>11</b>		

**C4. Employee Self Service**

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
• Manage Leave applications			
• Manage Overtime claims			
• Manage S&Ts claims			
• Employee change of personal details			
• Document uploads			
• Personnel file management			
• Position/Structure Management			
<b>Total Score</b>	<b>7</b>		

**C5. Manager Self Service**

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
• Manage employee leave applications			
• Manage employee overtime applications			
• Manage employee S&Ts claims			
• Document uploads for support of applications			
• Position/Structure Management			
• Begin the requisition process to create job openings			
<b>Total Score</b>	<b>6</b>		

**C6. Benefits**

Does the System Help with the Following HR Activities?	Complies		NOTES
	Yes	No	
• Pension and provident fund allocation			
• Allow employees to change benefit options			
• Approval of benefit changes			
• Assign different benefits packages to diverse groups of employees based on eligibility rules.			
• Updates benefit/deduction plans based on employee grade change.			
• Tracks and maintains information for dependents and beneficiaries.			
• Facilitate reporting to third-party service providers such as benefit providers.			
• Support employee enrolment in 13 <sup>th</sup> Cheque saving scheme.			
• Allows for online management of life events (e.g. marriage, birth, death, divorce, address change)			
<b>Total Score</b>	<b>9</b>		

**C7. Compensation**

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
• Provide complete employee compensation history (including merit, incentives, commission, pay rate changes, etc.).			
• Establishes and maintains salary structure and ranges by grade.			
• Facilitate base salary, merit increase, and annual incentive planning.			
• Enable date-driven salary changes (allowing past and future changes).			
• Automatically updates employee base salary, annual and long-term incentive with approved amounts.			
• Provide total compensation views/reports to employees.			
• Automatically generate salary increase letters.			
• Facilitate an automated process for annual increases.			
• Provides budget worksheets to assist managers in compensation planning.			
• Dummy payslip generation			
• Automate setting paycales			
• Bonus provision, budgeting			
<b>Total Score</b>	<b>12</b>		

**C8. General HR requirements**

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
• Establish new organisational entities (e.g., companies, cost codes, and other variables) with no IT/programming or service provider professional services required.			
• Add/change organisational entities and easily/effectively transfer employees within and/or across those entities.			
• Maintain employee demographic data for all employment-related details (e.g., birth date, employee number, gender, hire date, contact information).			

<ul style="list-style-type: none"> <li>Maintain marital, family, and dependent/beneficiary related and tax-related information.</li> </ul>			
<ul style="list-style-type: none"> <li>Maintain historical data for current/former employees (e.g., names, employment, job/assignments, performance ratings, status, and pay).</li> </ul>			
<ul style="list-style-type: none"> <li>Generate, identify, and track all employee types by unique employee number, e.g. ID number.</li> </ul>			
<b>Total Score</b>	<b>6</b>		

### C9. Organisational structure and charts

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Provides an ability to view the organisational chart</li> </ul>			
<ul style="list-style-type: none"> <li>To structure the organisation chart based on the reporting lines defined for each employee.</li> </ul>			
<ul style="list-style-type: none"> <li>To track open positions in the organisation chart.</li> </ul>			
<b>Total Score</b>	<b>3</b>		

### C10. Training and Development

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Create and maintain a catalogue of courses</li> </ul>			
<ul style="list-style-type: none"> <li>Compilation of Workplace Skills Plan</li> </ul>			
<ul style="list-style-type: none"> <li>Manage Individual Development Plans (IDPs)</li> </ul>			
<ul style="list-style-type: none"> <li>Identifying Training Providers</li> </ul>			
<ul style="list-style-type: none"> <li>Update IDPs</li> </ul>			
<b>Total Score</b>	<b>5</b>		

## C11. Workflow

Describe the workflow capabilities provided by your product and identify which modules have workflow capabilities.

Does the System Help with the Following HR Activities?	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>• Provide built-in approvals for a hierarchy (multiple levels) of approvers.</li> </ul>			
<ul style="list-style-type: none"> <li>• Provide for approval by role, where anyone who is assigned the role can approve incoming requests.</li> </ul>			
<ul style="list-style-type: none"> <li>• Allows the re-allocation or delegation of tasks from one approver to another.</li> </ul>			
<ul style="list-style-type: none"> <li>• Allows the assignment of observers and e-mail recipients to workflow processes.</li> </ul>			
<ul style="list-style-type: none"> <li>• Automatically send e-mail notices to approvers to inform them that they have a request that requires attention.</li> </ul>			
<ul style="list-style-type: none"> <li>• Automatically sends e-mail notices to the initiator of a request to let him/her know it has been approved.</li> </ul>			
<ul style="list-style-type: none"> <li>• Allows users to view outstanding workflow transactions in various states such as pending or complete</li> </ul>			
<ul style="list-style-type: none"> <li>• Allow out of the office delegations to automatically manage workflows during an individual's absence</li> </ul>			
<ul style="list-style-type: none"> <li>• Allow users to cancel pending workflows (e.g., when an employee leaves the service provider).</li> </ul>			
<ul style="list-style-type: none"> <li>• Provides wizards to walk managers through work event processes.</li> </ul>			
<ul style="list-style-type: none"> <li>• Uses audit trails to capture all modifications to employee information.</li> </ul>			
<ul style="list-style-type: none"> <li>• Captures the date and time when a request was approved.</li> </ul>			
<ul style="list-style-type: none"> <li>• Captures who approved a request.</li> </ul>			
<ul style="list-style-type: none"> <li>• Capture approver comments associated with a request.</li> </ul>			
<ul style="list-style-type: none"> <li>• Perform real-time updates to employee information.</li> </ul>			
<ul style="list-style-type: none"> <li>• Allows users to make date-sensitive changes, which are applied on the desired date.</li> </ul>			

<ul style="list-style-type: none"> <li>Allows users to view summary statistics about all workflow activity.</li> </ul>			
<ul style="list-style-type: none"> <li>Allows workflow e-mail messages to be customised.</li> </ul>			
<ul style="list-style-type: none"> <li>Displays warning and error messages to users in relation to requested changes.</li> </ul>			
<b>Total Score</b>	<b>19</b>		

## C12. DOCUMENT MANAGEMENT

This section evaluates the service provider's ability to help ICASA with legislative and policy-driven documents required in using the system.

Does the System Have the Following	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Store and manage documents for and about employees in a single system?</li> </ul>			
<ul style="list-style-type: none"> <li>A central repository of documents with flexible search options?</li> </ul>			
<ul style="list-style-type: none"> <li>Employees upload and access their documents at any time?</li> </ul>			
<ul style="list-style-type: none"> <li>Employee documents attached to the same record used to capture all employee information, providing a single source of data?</li> </ul>			
<ul style="list-style-type: none"> <li>Access to documents established by user roles?</li> </ul>			
<ul style="list-style-type: none"> <li>Identify documents which contain Personally Identifiable Information and apply enhanced security and access controls to this sensitive information?</li> </ul>			
<ul style="list-style-type: none"> <li>document size limitations of at least 5mb</li> </ul>			
<b>Total Score</b>	<b>7</b>		

### C13. DATA MANAGEMENT AND REPORTING

This section evaluates the service provider's ability to help ICASA with legislative, compliance, operational reporting and the ease with which ICASA employees and managers can create custom reports.

Does the System/Service Provider Have the Following	Complies		Notes
	Yes	No	
• Have built-in reporting templates for legislative and compliance reporting?			
• Does the system have different levels of segregation of duties based on user type?			
• Can export reports to excel			
• Can ad-hoc reports be created by any user – regardless of technical background?			
• Runs on an SQL Server?			
• Relational database?			
• Have a database schema document?			
• Supply ICASA with a printed database schema?			
• Operate in an environment where development and production are separate?			
<b>Total Score</b>	<b>8</b>		

**C14. DATA SECURITY**

This section evaluates the service provider's ability to help ICASA with CIT Triad of data security (Confidentiality, Integrity and Availability).

Does the System Have the Following	Complies		Notes
	Yes	No	
• Data encryption of private and confidential information			
• Have a distributed denial-of-service attack (DDoS) prevention feature to ensure system availability tools			
• Maintain audit trails of the employee file and data updates by date, time, and origin of update.			
• Audit trails for all additions, updates and changes.			
• Generates logs of system changes			
• Generates a report of activities of the system administrator			
• Does the system allow payroll administrators to do payroll backup before rollover?			
<b>Total Score</b>	<b>7</b>		

**C15. COMPATIBILITY**

This section evaluates the service provider's ability to integrate with existing ICASA systems.

Question	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Is the system a web-based application?</li> </ul>			
<ul style="list-style-type: none"> <li>Does the system integrate with Active Directory for one login?</li> </ul>			
<ul style="list-style-type: none"> <li>If no to the question above, does the system allow for complex passwords and automatic expiry of passwords after 30 days</li> </ul>			
<b>Total Score</b>	<b>3</b>		

**C16. SYSTEM DOCUMENTATION**

This section evaluates the service provider's ability to support ICASA with relevant system documentation as well as keeping these documents up-to-dated.

Question	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>When we purchase the software, do we receive a printed system manual?</li> </ul>			
<ul style="list-style-type: none"> <li>Alternatively, are we expected to use the online help feature to look up how to use the application and buy the print- or CD-based materials separately?</li> </ul>			
<ul style="list-style-type: none"> <li>Are explanations of error messages included in the documentation?</li> </ul>			
<ul style="list-style-type: none"> <li>Are the directions clear as to how someone uses the software effectively?</li> </ul>			
<ul style="list-style-type: none"> <li>Are courses of action enhanced by useful examples where appropriate?</li> </ul>			
<b>Total Score</b>	<b>5</b>		

**C17. ONLINE HELP/SERVICE PROVIDER HELPDESK**

This section evaluates the service provider's ability to support ICASA personnel with system-related queries and complex transactional issues.

Question	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Is there a Web site we can visit for troubleshooting tips, lessons, or technical support?</li> </ul>			
<ul style="list-style-type: none"> <li>Does the system evaluate and validate user input and disallow wrong entries into the system?</li> </ul>			
<ul style="list-style-type: none"> <li>Can ICASA log any service request to a centralised helpdesk?</li> </ul>			
<ul style="list-style-type: none"> <li>Can the service provider provide a two (2) business hour service call to critical calls?</li> </ul>			
<ul style="list-style-type: none"> <li>Is the software update part of pricing?</li> <li>Does the annual fee include software updates?</li> </ul>			
<ul style="list-style-type: none"> <li>Are notifications of updates automatically e-mailed?</li> </ul>			
<ul style="list-style-type: none"> <li>Will our sales/support representative inform us when minor patches or significant upgrades are available?</li> </ul>			
<b>Total Score</b>	<b>7</b>		

### C18. IMPLEMENTATION

This section evaluates the service provider's ability to successfully roll out the system within acceptable timelines and their project management capability.

Question	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Can the service provider comply with the leave rules explained in Annexure E</li> </ul>			
<ul style="list-style-type: none"> <li>The service provider is required to provide ICASA with an IT architecture, showing requirements for servers and databases and environments for on-premise hosting of the proposed solution.</li> </ul>			
<b>Total Score</b>	<b>2</b>		

### C19. USER TRAINING, SUPPORT, AND UPDATES

This section evaluates the service provider's ability to train ICASA employees who will be using the system and the ease with which technical support can be obtained. Training is required as follows. The service provider must provide a minimum of 20 hours of support

Question	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Does the implementation price include training for ICASA employees?</li> </ul>			
<ul style="list-style-type: none"> <li>Can the service provider train ICASA employees onsite (within ICASA premises)?</li> </ul>			
<ul style="list-style-type: none"> <li>Does the service provider train all staff members, without using the train the trainer arrangement?</li> </ul>			
<b>Total Score</b>	<b>3</b>		

## C20. DATA IMPORT AND EXPORT OPTIONS

This section evaluates the service provider's ability to minimise manual data capturing.

Question	Complies		Notes
	Yes	No	
<ul style="list-style-type: none"> <li>Will the software allow us to export data to an external file type, such as a database, spreadsheet, or plain text (e.g., delimited and fixed-length), so we can manipulate that data for special reports?</li> </ul>			
<ul style="list-style-type: none"> <li>Will the software allow us to import data from external sources, such as databases or spreadsheets, so we do not have to key in old data from scratch?</li> </ul>			
<ul style="list-style-type: none"> <li>Does the system support Optical Character Recognition (OCR) for uploading documents and reduce data capturing?</li> </ul>			
<b>Total Score</b>	<b>3</b>		



**ANNEXURE D:  
SYSTEM USER EXPERIENCE**

This section evaluates the user interface from the evaluator’s perspective. The service provider will demonstrate the different activities as outline below and the evaluators will base their positive or negative response based on user experience as if they were using the system.

	Service Provider to demonstrate the following	Question that BEC member needs to ask themselves and score accordingly	Response		Notes
			Positive	Negative	
1	SP must capture a vacancy and demonstrate how the advert can be loaded and then reflected on the internet	Can the system very easily take the process from confirmed job spec to advert which can be responded to			
2	SP must demonstrate how a prospective employee can capture an application online for a vacant position	Is the process of applying for a position easy and is the system able to highlight mandatory or incorrect information?			
3	SP must demonstrate navigating between the different system modules and complete a leave application with manager notification and approval	Does the system show available leave days and does the system automatically send approval request to manager? Can manger click on hyperlink for approval?			
4	SP must show an employee applying for sick leave (more than 2 days) or compassionate leave and demonstrate how the system will force the employee from including an attachment before	Can the system conform to ICASA leave policy requirements?			

	the leave application can be submitted.			
5	SP must demonstrate employee self service portal and the different functionalities available.	I would imagine that most colleagues would learn to use ESS very easily.		
6	SP must process a training request from an employee and show the approval process required.	Is the training application linked to an individual's development plan and is the process of applying for training easy to use?		
7	SP must show employee screen (which HR staff can see) reflecting confidential / sensitive information and then show different view of same screen with confidential / sensitive information not reflecting.	The system has very good security features which will ensure that only the required people can see sensitive information.		
8	SP must capture a performance contract (in role of employee) and show manager sign-off. Thereafter the assessment must be completed on the system.	The performance management module is very easy to use with automatic notifications sent to line managers.		
9	SP must capture a request for overtime and demonstrate the approval process	Is the overtime approval process automated		
10	SP must capture a request sundry and travel and demonstrate the approval process.	Is the S&T process automated		
11	SP must demonstrate the ability to create dummy pay slips.	Can ICASA issue prospective employees a dummy pay slips so that they can see their deductions and net pay?		
<b>Total Score</b>			<b>11</b>	

**ANNEXURE E**

Type of leave	Entitlement in days	Accrual	Proof compulsory ?	Mid month jointers	Stop accumulating at 42 days	Forfeit excess of 30	New employees	Compulsory medical certificate	Compulsory medical certificate 2	Only approved by CEO	Unpaid extension option in days
Annual Leave	25	2.0833 per month	No	Prorata	42	After 6 months of cycle					
Shut down leave	4		No								
Sick Leave	40 in three-year cycles		Conditional				1 day every 26 days for first 6 months	More than 2 consecutive days	Two occasions within 8 week period		
Temporary Incapacity Leave	30 in three-year cycles		Yes							Yes	
Permanent Incapacity Leave	30 in three-year cycles		Yes							Yes	
Leave for Occupational Injuries	Flexible		Yes								
Maternity Leave	122	Annual leave will accrue as normal	Yes								90

Type of leave	Entitlement in days	Accrual	Proof compulsory?	Mid month jointers	Stop accumulating at 42 days	Forfeit excess of 30	New employees	Compulsory medical certificate	Compulsory medical certificate 2	Only approved by CEO	Unpaid extension option in days
Adoption Leave	45		Yes								90
Family responsibility leave	13		Yes								5
Study leave	2		Yes								
Class attendance leave	5		Yes								
Resettlement leave	2		Yes								
Quarantine leave	10		Yes								
Sports leave	5		Yes								
Shop stewards leave	Flexible		Yes								
Miscellaneous leave	Flexible		Yes								
Birthday leave	0.5										
Unpaid leave	Flexible		Yes								