

REQUEST FOR PROPOSAL

Database Management Solution

Closing Date: Tuesday, 30 June 2020

Time: 12:00 South African Time

I. Request for Proposal

The Association of Black Securities and Investment Professionals ("ABSIP") herewith invites proposals from interested service providers to submit responses to this Request for Proposal ("RFP") for assisting ABSIP with a database management solution.

II. Purpose of the Document

The purpose of this RFP document is to provide broad details relevant to the services required and is not intended to provide a detailed overview of every action required.

III. Background

The Association of Black Securities and Investment Professionals (ABSIP) is a member-driven organisation that was founded in 1995 with the objective of driving transformation in the Financial Services sector of the South African economy. Over the past 25 years, the organisation has played a leading role in championing transformation in the financial services sector. As a member-based organisation, ABSIP regards the role of members in shaping, formulating and delivering on its initiatives as a fundamental pillar of our success. Consequently, ongoing interactions with members are a critical variable of our model. Such a model requires the membership database to be efficiently and professionally managed on an ongoing basis.

Our membership profile

The organisation has a data base consisting an estimated 5 000 members. The membership consists of:

- Corporate members – who are mostly institutions in the financial services sector, consisting of asset management companies, insurance companies, banks and similar organisations. These are regarded as 'demand-side' members
- Individual members – who are mostly financial services professionals or university students, from the ages of 20 – 45 on average. These are regarded as 'supply-side' members

IV. Problem statement

Currently, the membership data is being stored on the Zoho CRM platform. Some of the challenges with our current solution have been:

- Reconciling members payments – this is currently a manual process of reconciling bank account statements with membership names/invoice numbers.
- Duplicate member values
- Static data

V. Objective

ABSIP is looking for a solution that would better optimise the use of its current database. We are therefore inviting service providers to submit potential solutions for the management of the ABSIP Membership Database. The envisaged solution should be a comprehensive portal for membership management. It should enable ABSIP to be able to track and manage member information and interactions. Additionally, it should comply with the various legislative protocols relating to the handling and storage of personal data.

The solution can be a mobile application or a web based solution (or both). The solution should provide the following key features:

1. Customer Account & User Interface

Members should be able to log into their own account whereby they can access all the basic information:

- Membership Information – this would be an area where information regarding their ASBIP membership would be provided. Fields would include (but not limited to):
 - Membership Number
 - Active / non-active
 - Order History
- Personal Information – This would be an area where customers could upload their personal details. Field would include (but not limited to):

For individual members

- Name
- Email Address
- Contact Number
- Occupation
- Company
- CV

For Corporate members

- Organisation Name
- Key individuals
- Enrolled members (Corporates can list 5 individual members to go under their membership)

2. Automated Billing Functionality

Members should be able to receive invoices and pay on the site seamlessly

3. Communication Functionality

Members should be able to receive communication from ABSIP. Communication channels would be:

- The account – system should allow ABSIP to be able to advertise activities, including upcoming events, webinars, articles etc... (any communication that the organisation seeks to get to members)
- Email – information should also be distributable via email to membership database (or a subset thereof).
- Push notification of communication

4. Event Management Functionality

Members should be able to:

- Register for events
- Buy tickets for events, with details showing along their order history
- Participate in Surveys

5. Corporate Members to Individual Members Information Sharing

The solution needs to allow for my dynamic communication & information sharing between Individual members, corporate members and ABSIP (under ABSIP guidelines). For example:

- Allowing corporate members to advertise job opportunities on the site. Selected individual members may be able to view / apply.

6. Compliance with POPI Act

It is envisaged that the membership database management system will store data that falls within the definition of 'personal information' as defined Chapter 1 of the Protection of Personal Information Act, 2013 ("POPI Act"). The solution provided should therefore be able to comply with the provisions of Condition 7 of the POPI Act relating to the handling of personal information.

VI. RFP Submissions & Evaluation

1. Submission Process

This RFP is issued on an open tender notice format with a definite closing date and time.

Respondents are required to submit their proposals via email to manager@absip.co.za by no later than 12:00 noon (South African Time) on Tuesday, 30 June 2020. The email responses should have a clear subject line that states "RFP Submission – (company name)". Failure to adhere to these requirements may result in your application being disqualified.

Queries relating to the RFP can be submitted, before the closing date, via email to manager@absip.co.za and must have a clear subject line that states "RFP Query – (company name)".

2. Evaluation Process

All proposals submitted will be reviewed and evaluated by the ABSIP National Executive Committee. Proposals will be evaluated on the following basis:

- The ability of the solution to meet ABSIP's desired objective
- The cost of the solution
- The B-BBEE credentials of the service provider

Successful respondents may be requested to provide additional information relating to their proposal. Including, but not limited to, demos of their proposed solution and trade references.

ABSIP reserves the right to withdraw, at any stage of this process, amend or cancel this RFP, reject or not accept any or all proposals, appoint one or more than one service provider or no service provider at all.