



REQUEST FOR PROPOSALS

COMMUNICATION/MEMBER RECRUITMENT SERVICES

1. Introduction

The National Fund for Municipal Workers (“the Fund”) invites proposals from interested service providers to submit responses to this Request for Proposals (RFP) for the:

- Provision of integrated communications services as part of the Fund’s growth strategy.

2. 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 view of every action required.

3. Background

The Fund is a retirement fund serving members who are employed in the local government sector.

The Fund is registered and approved under the Pension Funds Act and the Income Tax Act respectively. The Fund is mainly governed by the said two pieces of legislation as well as other relevant legislation, standards and norms. The Fund provides retirement, withdrawal, death and disability benefits to members, pensioners and their dependents.

The Fund has approximately 55 000 active/contributing members, 103 annuitants and R23 billion in assets under management as at 30 June 2021.

The Fund's vision is to positively impact the lives of its members, their families, and their communities, today and tomorrow. Its mission is to be a trusted custodian who grows members investments and keeps them informed along the way to a secure retirement.

2 Scope of Work

The Fund seeks to contract with a qualified service provider to provide Communications services, to support the implementation of its strategy which includes market penetration. An opportunity has arisen to expediate that strategy through the rationalisation of retirement funds within the Local Government. As part of the rationalisation exercise, members will be afforded an opportunity to elect to join a fund of their choice. Currently, municipal sector employees are not able to switch between retirement funds that operates in the local government space. The freedom of employees to associate (or join) a fund of their choice was made possible by the adoption of a collective agreement reached by the South Africa Local Government Bargaining Council in this regard, implementation date is 1 July 2022.

The services required need to commence as soon as possible since communication is one of the critical tools in attracting new and retaining existing

members. We are targeting to grow our membership nationwide but with focus on certain provinces and municipalities .

Please provide the potential deliverables you would propose that the Fund considers and the KPI's you will be measured against on the scope of work below:

- **MEMBER COMMUNICATIONS/RECRUITMENT**
 - Member rationalisation communication/presentation
 - Member sentiment analysis
 - Representative(s) stationed at the targeted municipalities
 - Recruitment of new members
 - Retention of existing members
 - Increase visibility and presence at targeted municipalities
- **EXTERNAL COMMUNICATIONS**
 - Localised campaigns to targeted municipalities
 - Event management support
 - HR training and support
- **DIGITAL STRATEGY**
 - Website content management (particularly search engine optimisation management)
- **BRAND AND REPUTATION**
 - Proactive public relations and positioning of the NFMW's brand and leadership
 - Strategic counsel to OPEO on communications
 - Media monitoring (tool and reporting)
 - Media relations and response handling
 - Stakeholder relations
 - Crisis communications
 - Strategic communications
- **GENERAL**
 - Assist with content FOA content development
 - Campaign management

- Assist with publication management

3 Compliance prerequisite

The Fund requires the Communications firm to meet all the regulatory and compliance requirements. The proposals to be received is to confirm and/or provide documentary evidence and must be presented in the following format:

Section	Title
1	Company profile and track record
2	Proposed team members and their credentials
3	Proposed services
4	Key deliverables
5	Pricing and assumptions
6	References (3 to be included)
7	B-BBEE (provide certified copy of the B-BEE certificate)
8	Declaration of no conflict of interests that prejudice the firm diligently and independently delivering the required work

4 Technical Expertise and Capability

4.1 Personnel of the Communications Firm

- Please provide the Fund with brief profile of the individual who will be assigned to lead the communications work on the Fund. The profile should provide clear information on the individuals':
 - Qualifications,
 - Experience in retirement fund communications, and
 - Experience in operating, engaging and communicating in the local government space.
- Please provide the Fund with some high-level information relating to other (than profile mentioned above) staff compliment who also perform communications on retirement funds within your firm or plans around this aspect.

- c) Please note that you cannot unilaterally change, during the course of your appointment, the individual(s) whose profile(s) would have been provided in your proposal without prior engagement with the Fund.

4.2 The Communications Firm

Please provide the Fund with your firm`s history on communications and engagement with retirement Fund members, medical aids members or trade unions members. The firm`s communications history is to include the following aspects:

- years of experience in providing communications to retirement funds, medical aids and trade unions;
- details of a couple of retirement funds, medical aids and trade unions that the firm has provided such services within the last three (3) years. Please include approximate membership and contactable references for each of the retirement funds, medical aids and trade unions, duration of the relationship with those organisations (how long have you provided such services to these organisations).

5 Fees

Please indicate the proposed fees, per member (inclusive of VAT and any disbursements) in your proposal.

6 Duration of the Contract

This is a once off project for the duration of the rationalisation of retirement funds, but same/similar services may be required in the future.

7 Evaluation Methodology

Proposals will be evaluated based on aspects of compliance, technical expertise, fees and B-BBEE. Whilst the Fund will , in good faith, fairly adjudicate on the proposals , the Fund has full discretion in the judgement criteria and no further

correspondence will be entered into regarding the adjudication process once the process has been completed. Should you not agree with this stipulation, please disregard this request for proposal document.

Shortlisted respondents may be invited to make presentations which will be part of the evaluation and scored accordingly.

8 POPI and Confidentiality

In compliance with Protection of Personal Information Act of 2013, the Fund's confidential information, and any other proprietary information, the Fund will only use the statistics and information provided for evaluating the proposals that would have been received. As acknowledgement of the confidentiality of the information, the information provided will be treated as confidential and will not be used for any other purpose other than the purpose for which it was acquired for.

9 Proposals submission date

The closing date for the submission of proposals is 28 October 2021. Please submit your proposal by email to Mr Leslie Ndawana Leslie@nationalfund.co.za and Ms Tebogo@nationalfund.co.za.

10 Conclusion

Thank you for considering our request for proposals. The Fund will inform you of the outcome of the evaluation process as soon as the evaluation process is completed.

Office of the Principal Executive Officer

National Fund for Municipal Workers

14 October 2021