

Request for Proposal (RFP)

RFP Name:	Kagiso Trust – Civil Society Support Programme Database
RFP Purpose:	The purpose of this Request for Proposal (RFP) is to identify a qualified service provider to design, develop, implement, and support a comprehensive Civil Society Organization (CSO) Database for Kagiso Trust's Civil Society Support Programme (CSSP). The solution must consolidate fragmented CSO data from multiple government registries into a unified, secure, and searchable platform that enhances sector coordination, visibility, and support targeting. The successful bidder will deliver a scalable, compliant, and future-ready database solution that integrates with existing systems and supports planned expansion into the CSSP Trading Hub.
Date Issued:	15 June 2026
Contact Person:	Email: tenders@kagiso.co.za
Address:	Kagiso Trust, 27 Scott Street, Waverly, Johannesburg, 2000, South Africa

Kagiso Trust
27 Scott Street, Waverley
Johannesburg 2090
Gauteng
South Africa

Postal Address
PO Box 1878
Johannesburg
2000
South Africa

Tel: +27 11 566 1900
Fax: +27 11 566 1934
www.kagiso.co.za
Email: info@kagiso.co.za



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1. Background

Kagiso Trust (KT) is a leading South African development organisation with a long-standing mandate to enable sustainable socio-economic transformation. Through its Civil Society Support Programme (CSSP), the Trust seeks to strengthen the civil society sector in South Africa by improving coordination, visibility, and the precision of support targeting for Civil Society Organisations (CSOs).

The South African CSO landscape is currently characterised by fragmented data, with critical information dispersed across multiple government registries, including the Department of Social Development (DSD) NPO database, the Companies and Intellectual Property Commission (CIPC) NPC register, and South African Revenue Service (SARS) datasets. This fragmentation creates significant challenges for KT and other stakeholders in identifying, verifying, and supporting CSOs effectively.

To address these challenges, Kagiso Trust has initiated the development of the CSSP Platform. A foundational component of this platform is the CSO Database, which aims to consolidate these disparate data sources into a single, high-performance, and unified repository.

The CSO Database is intended to transition KT from manual, time-consuming data gathering to an evidence-based, data-driven approach. This initiative will not only improve internal operational efficiency and regulatory compliance but also serve as the essential architectural foundation for the future CSSP Trading Hub, a digital marketplace that will be designed to facilitate trade and resource sharing within the civil society sector.

1.1 Project Objectives

The primary objectives of the CSO Database project are to:

- 1.1.1 Establish a Unified Repository: Consolidate over 500,000 records from DSD, CIPC, and SARS into a "single version of the truth."
- 1.1.2 Enhance Discovery and Targeting: Enable efficient CSO discovery through advanced search and filtering to support KT programme delivery.
- 1.1.3 Ensure Data Integrity: Implement sophisticated deduplication and unique identifier systems to maintain high data quality.
- 1.1.4 Guarantee Compliance: Ensure full alignment with the Protection of Personal Information Act (POPIA) and international standards.
- 1.1.5 Enable Future Scalability: Provide a modular foundation ready to support the upcoming Trading Hub marketplace and potential AI/ML enhancements.

2. Scope of Work

Kagiso Trust invites proposals from suitably qualified service providers for the design, development, implementation, and support of a unified Civil Society Organisation (CSO) Database.

2.1 Proposals may be submitted by:

- 2.1.1 Software development firms with experience in large-scale data integration and database management.
- 2.1.2 Systems integrators proposing a custom-built or platform-based solution (e.g., Microsoft Azure/Power Platform).
- 2.1.3 Consortia comprising data specialists and application developers.

2.2 The scope of work includes, but is not limited to:

2.2.1 Data Ingestion and Integration:

- Development of automated data pipelines to ingest records from the DSD NPO database, CIPC NPC register, and SARS NPO datasets.
- Implementation of manual data upload capabilities for Kagiso-sourced data with validation and error handling.
- Integration with Microsoft 365 (SharePoint for document storage and Azure AD for Single Sign-On).

2.2.2 Data Management and Quality:

- Development of a unified data model and unique identifier system using NPO/NPC registration numbers.
- Implementation of sophisticated data merger and deduplication logic to ensure a "single version of the truth."
- Creation of data validation rules and quality reporting dashboards to maintain a target completeness score of $\geq 90\%$.

2.2.3 Application Development:

- Development of a web-based User Interface (UI) for advanced search, filtering, and CSO profile lookups.
- Implementation of a self-registration portal for CSOs to update and manage their own profiles.
- Development of an Executive Dashboard and Analytics layer using Power BI for provincial and sector-based reporting.

2.2.4 Security and Compliance:

- Ensuring full POPIA compliance, including data encryption at rest and in transit, audit logging, and role-based access control (RBAC).

- Implementation of secure data residency within South African borders.

2.2.5 Project Delivery and Support:

- Execution of the project.
- Comprehensive data migration from legacy datasets.
- User training, technical documentation, and knowledge transfer to KT staff.
- Post-implementation support and maintenance under a defined Service Level Agreement (SLA).

2.3 Future-Proofing (Trading Hub Readiness):

The solution must be architected to support the future **CSSP Trading Hub** marketplace. This includes providing an extensible API layer, a scalable infrastructure, and a modular design that allows for the addition of trading and matching functionalities in subsequent phases.

3. Phases

The project will be executed in three key phases with milestone-based payments tied to verified deliverables.

3.1 Phase Details

Phase 1: Service Provider Appointment

- Finalize RFP requirements and issue to shortlisted vendors
- Evaluate proposals, conduct clarification meetings
- Select preferred service provider and issue appointment letter

Phase 2: SLA & Requirements Alignment

- Project kick-off and detailed requirements walkthrough
- Finalize Service Level Agreement (SLA) and payment schedule
- Establish communication protocols and project tracking tools

Phase 3: Development

- Agile development of core system functionality including data ingestion, merger, search, reporting, and integration
- Bi-weekly check-ins and Kanban-style progress monitoring
- User Acceptance Testing (UAT), bug fixes, deployment, and go-live preparation

4. Project Deliverables

The successful Service Provider will be responsible for delivering a fully functional, secure, and compliant CSO Database solution that meets the requirements outlined in this RFP. Deliverables include, but are not limited to, the design and development of data ingestion pipelines from multiple government registries, implementation of data merger and deduplication logic, development of an intuitive web-based user interface with advanced search and lookup capabilities, and integration with Microsoft 365 services such as SharePoint and Power BI.

The Service Provider will also deliver comprehensive technical and user documentation, conduct user training sessions, and provide post-implementation support and maintenance under agreed Service Level Agreements (SLAs). All deliverables must be completed in accordance with the agreed project timeline and quality standards, with formal acceptance required at each milestone.

4.1 Functional Requirements

The Service Provider shall deliver a database solution that fully implements all functional requirements specified in this RFP, including but not limited to:

4.1.1 Data Ingestion Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-01	Data Ingestion: DSD NPO	Import DSD CSOs data automated pipelines with logs; track data lineage	Must Have
FR-02	Data Ingestion: CIPC NPC	Import CIPC CSOs data; handle schema mapping to unified model; implement deduplication logic	Must Have
FR-03	Data Ingestion: SARS NPO	Import SARS CSOs dataset as provided by Kagiso Trust; maintain data lineage; support defined update cadence	Must Have
FR-04	Data Ingestion: Manual Upload	Support periodic, manual uploads by Kagiso staff within agreed monthly volume and time limits; validate data on ingest; reject invalid records with error messaging	Must Have
FR-05	CSO Self-Registration Portal	Provide a secure, web-based portal allowing CSOs to register their organization, create a profile, and upload mandatory compliance documentation (e.g., NPO/NPC certificates).	Must Have

4.1.2 Data Management Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-06	Data Merger	Create unified Kagiso CSO Database by merging DSD NPO, CIPC NPC, and SARS datasets; implement matching and deduplication algorithms; maintain source attribution	Must Have
FR-07	Unique Identifier	Use unique number as primary lookup key; enforce uniqueness across database; maintain referential integrity.	Must Have
FR-08	Data Quality Management	Implement data validation rules; flag incomplete or inconsistent records; generate data quality reports; support data cleansing workflows	Must Have

4.1.3 Core Data Model Fields

The database must store the following core fields for each CSO record:

Field Name	Data Type	Required	Description
Record Number	Integer	Yes	System-generated unique identifier
Type	String(20)	Conditional	Type of organization
Organisation Name	String(255)	Yes	Legal name of organization
Physical Address	Text	Yes	Street address
City/Town	String(100)	Yes	City or town
District	String(100)	Yes	District municipality
Postal Code	String(10)	Yes	Physical address postal code
Province	String(50)	Yes	Province (9 options)
Postal Address	Text	Yes	Mailing address if different
Postal City/Town	String(100)	Yes	Postal city
Postal Code (Mailing)	String(10)	Yes	Mailing postal code
Telephone	String(20)	Yes	Contact telephone
Email	String(255)	Yes	Primary email address
Date Registered	Date	Yes	Registration date
Contact Person	String(255)	Yes	Primary contact name
Sector	String(100)	Yes	Primary sector classification

Director/Lead person of CSO	String(255)	Yes	Head of the organization
Primary Service Provided	String(255)	Yes	What particular service CSOs provides

4.1.4 Search and Lookup Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-09	Advanced Search	Search by organization name (partial match), category/subcategory, location (province/district/city), CSO number; support combined filters with AND/OR logic; return results within 3 seconds	Must Have
FR-10	Lookup Tool	Web UI for fast lookup by CSO number; display enriched profile including all stored metadata; provide print-friendly view; mobile-responsive design	Must Have
FR-11	GIS Integration	Geographic search capability; map visualization of CSO distribution; filter by geographic boundaries; support distance-based search	Must Have

4.1.5 Data Extraction and Reporting Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-12	Data Extraction	Export filtered search results to Excel (.xlsx); support configurable column selection; apply export criteria; generate audit log for all exports including user, timestamp, and filter criteria applied	Must Have
FR-13	Reporting	Generate timeous reports; support both scheduled (daily/weekly/monthly) and on-demand report generation; standard report templates provided	Should Have
FR-14	Data Portability	Provide full data extracts on request in agreed formats: SQL dump, CSV, Excel, or database-specific exports; support for authorised users only	Should Have

4.1.6 Support and Compliance Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-15	Audit Support	Facilitate one annual audit/assessment by Kagiso of security and data management practices; provide access to logs and documentation	Must Have
FR-16	Breach Notification	Notify Kagiso within 1 hours of any unauthorised processing, loss, damage, or breach of Personal Information	Must Have
FR-17	Processing Records	Maintain records of Personal Information processing within CSO database per POPIA; accessible for audit	Must Have

4.2 Dashboard and Analytics Requirements

4.2.1 Analytics Dashboard Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-18	Executive Dashboard	Provide high-level summary dashboard for CSSP Head displaying total CSOs, verified records, records by province, records by sector, and registration trends; data refreshed daily; filterable by date range	Must Have
FR-19	CSO Distribution Analytics	Visualise CSO distribution by province, district, and city; display counts and percentages; support drill-down functionality from province to district to city; integrate with GIS view where enabled	Must Have
FR-20	Sector Analysis Dashboard	Display CSO counts by primary sector classification; support multi-sector comparison; enable filtering by province and registration date; provide graphical formats (bar, pie, trend charts)	Must Have

FR-21	Registration Trends Dashboard	Show registration trends over time (monthly, quarterly, yearly); highlight growth patterns; enable filtering by province and sector; exportable visual reports	Should Have
FR-22	Data Quality Dashboard	Display completeness score, duplicate count, missing required fields, and validation error trends; show $\geq 85\%$ completeness target; highlight high-risk data gaps	Must Have
FR-23	User Activity Dashboard	Display system usage metrics including active users, search queries, exports performed, and login frequency; filter by user role and date range	Should Have
FR-24	Export & Audit Analytics	Provide analytics on data exports including number of exports, records exported, exporting user, and export frequency; integrate with audit logs	Must Have

4.2.2 Dashboard Filtering and Interaction Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-25	Global Filters	All dashboards must support global filters including province, district, sector, registration date range, and organisation type; filters update all visualisations dynamically	Must Have
FR-26	Drill-Down Capability	Users must be able to click on charts/visual elements to drill down into detailed views (e.g., Province → District → City → Organisation List)	Must Have
FR-27	Cross-Filtering	Selecting a data point in one visual must dynamically filter other visuals on the same dashboard	Should Have
FR-28	Data Refresh Indicator	Display last data refresh timestamp on each dashboard; support daily refresh at minimum	Must Have

FR-29	Print & Export Dashboard	Allow export of dashboards to PDF and Excel; maintain formatting and applied filters; generate export audit log	Must Have
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4.2.3 Role-Based Dashboard Access

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-30	Role-Based Dashboard Views	Dashboard visibility and data access must be controlled by user role (Admin, Power User, Standard User, Read-Only); restrict export permissions where applicable	Must Have
FR-31	Executive View	Provide simplified executive summary dashboard for CSSP Head with KPIs and trend indicators only; no raw data editing capability	Must Have
FR-32	Programme Manager View	Provide advanced analytics access for Power Users including deeper filtering, export capability, and custom queries	Must Have
FR-33	Read-Only View	Read-only users may view dashboards but cannot export datasets exceeding predefined limits	Must Have

4.2.4 Power BI Integration Requirements

Req ID	Requirement	Details/Acceptance Criteria	Priority
FR-34	Power BI Connectivity	Connect CSO Database to Power BI via secure API or direct connector; support scheduled refresh; authentication via Azure AD	Must Have
FR-35	Pre-Built Report Templates	Provide standard dashboard templates (Executive Summary, Provincial Distribution, Sector Analysis, Data Quality, Activity Metrics)	Must Have

FR-36	Custom Report Capability	Allow authorised Power Users to build custom dashboards using approved data model; restrict modification of core datasets	Should Have
FR-37	Data Model for Analytics	Provide optimised analytics data model (star schema or equivalent) for reporting efficiency; indexed for aggregation queries	Must Have

4.3 Integration Requirements

4.3.1 Microsoft 365 Integration

Req ID	Component	Integration Description	Priority
INT-01	SharePoint	Store exported reports, user documentation, and system files; leverage SharePoint document management; authenticate via Azure AD	Must Have
INT-02	Power BI	Connect database for analytics dashboards; provide pre-built report templates; support custom query development by authorized users	Must Have
INT-03	Azure AD	Single sign-on for Kagiso Trust users; role-based access control; audit logging of authentication events	Must Have

4.3.2 Future Trading Hub Integration

The database architecture must support future integration with the Trading Hub:

- API layer for data access
- User account framework expandable for CSO self-service
- Profile data model extensible for trading features
- Messaging queue capability for event-driven updates
- Scalable infrastructure supporting increased transaction volume

4.4 Security Requirements

4.4.1 Authentication and Access Control

Req ID	Requirement	Details
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SEC-01	Encryption & SSO/MFA	Encrypt data in transit (TLS 1.2+) and at rest; secure credential storage; support SSO/MFA (Azure AD preferred).
SEC-02	Role-Based Access Control	Minimum roles: Admin, Power User, Standard User, Read-Only; configurable permissions
SEC-03	Session Management	Session timeout after 30 minutes inactivity; secure session tokens; concurrent session limits
SEC-04	Password Policy	Minimum 12 characters; complexity requirements;

4.4.2 Data Protection

Req ID	Requirement	Details
SEC-05	Encryption at Rest	AES-256 encryption for all stored data; encrypted backups
SEC-06	Encryption in Transit	TLS 1.3 for all data transmission; HTTPS enforced
SEC-07	Data Masking	Mask sensitive fields in non-production environments
SEC-08	Data Classification	Classify data by sensitivity; apply handling rules per classification
SEC-09	POPIA Compliance	Data protection aligned to POPIA: lawful processing, purpose limitation, data minimization, and subject access support.
SEC-10	Data Residency	Environment security and data residency: cloud hosting in SA and regionally compliant data centres; disclose locations.
SEC-11	Vendor-Compliance	Vendor/partner to provide evidence of security posture (ISO27001/NIST-aligned or equivalent controls).

4.4.3 Audit and Monitoring

Req ID	Requirement	Details
SEC-12	Audit Logging	Log all data access, modifications, exports; tamper-evident logs; 7-year retention
SEC-13	Security Monitoring	Real-time alerting for suspicious activity; intrusion detection
SEC-14	Vulnerability Management	Regular security scans; patching within defined SLAs; penetration testing annually

5. Non-Functional Requirements

5.1 Performance Requirements

Req ID	Requirement	Target
NFR-01	List/Search Performance	List views and searches return within 3–5 seconds for datasets up to agreed volumes.
NFR-02	Page Load Time	< 2 seconds for initial page load
NFR-03	Concurrent Users	Support 500 simultaneous users
NFR-04	Data Export Time	< 10 seconds for 10,000 records
NFR-05	Report/Dashboard Performance	Dashboards and standard reports load within 3–5 seconds; ad-hoc complex reports ≤4–6 seconds.

5.2 Availability Requirements

Req ID	Requirement	Target
NFR-06	System Uptime	Cloud/SaaS or hosted solution with ≥99.9% production uptime SLA.
NFR-07	Planned Maintenance Window	Weekends 22:00-06:00, with 72hr notice
NFR-08	Backup & Recovery Targets	Automated daily backups; point-in-time re-recovery or defined RPO/RTO targets to be confirmed with vendor.

5.3 Scalability Requirements

Req ID	Requirement	Target
NFR-10	Database Capacity	Support 500,000+ CSO records
NFR-11	Storage Growth	Accommodate 50% annual growth
NFR-12	Horizontal Scaling	Architecture supports load balancing

5.4 Usability Requirements

Req ID	Requirement	Target
NFR-14	Browser Support	Chrome, Firefox, Edge (latest 2 versions)
NFR-15	Mobile Responsiveness	Functional on tablet and smartphone

NFR-16	Language	English (primary), South African languages (future)
NFR-17	Simple, Intuitive UI	Provide a simple, intuitive, and consistent user interface suitable for non-technical users aligned to KT corporate identity

Compliance with non-functional requirements shall form part of system acceptance and will be subject to validation by Kagiso Trust.

NB: Note that there might be changes made to the defined requirements during the implementation phase.

6. Service Scope

The appointed Service Provider (SP) is expected to provide a comprehensive suite of services to ensure the successful end-to-end delivery of the CSO Database. The service scope includes, but is not limited to:

6.1 Project Management

- 6.1.1 Governance: Establish a project governance framework, including a dedicated Project Manager to coordinate all activities with the Kagiso Trust (KT) project team.
- 6.1.2 Monitoring: Maintain a real-time, visual Kanban-style tracking board (e.g., MS Planner) accessible to KT stakeholders.
- 6.1.3 Reporting: Provide weekly written status reports and participate in bi-weekly structured progress check-ins (virtual or in-person).
- 6.1.4 Risk Management: Proactively identify, log, and mitigate project risks and blockers.

6.2 Quality Assurance and Testing

- 6.2.1 Functional and non-functional Testing: Conduct rigorous internal testing to ensure all features (search, filters, uploads) operate according to the Business Requirement Document (BRD).
- 6.2.2 User Acceptance Testing (UAT): Facilitate the UAT process with KT staff, including the provision of test cases, defect logging, and resolution of all Severity 1 and 2 issues prior to go-live.
- 6.2.3 Data Validation: Verify that the migrated data meets the target completeness score of $\geq 90\%$ and that deduplication logic is functioning correctly.

6.3 Training and Knowledge Transfer

6.3.1 User Training: Conduct training sessions for CSSP staff and administrators on system usage, data management, and reporting.

6.3.2 Documentation: Deliver comprehensive documentation, including:

- User Manuals and Administrator Guides.
- Technical Architecture and Data Dictionary.
- API Documentation (for future Trading Hub integration).
- Handover Pack for internal ICT support.

6.4 Post-Implementation Support

6.4.1 6.5.1 Hypercare: Provide a minimum 30-day "Hypercare" support period immediately following go-live to resolve any stability or performance issues.

6.4.2 6.5.2 SLA Support: Define and agree upon a long-term Service Level Agreement (SLA) for ongoing maintenance, security updates, and technical support.

7. Proposal Instructions for Service Providers

To be considered for the CSO Database project, Service Providers must submit a comprehensive proposal structured into the following sections by **10 July 2026**. Failure to provide any of the requested information may lead to disqualification.

7.1 Section 1: Executive Summary and Company Profile

7.1.1 Company Overview: Provide a brief history of the firm, its core competencies, and its experience in large-scale data integration and custom software development.

7.1.2 Relevant Experience: Detail at least three (3) similar projects completed in the last five years, specifically focusing on database consolidation, government registry integration, or NGO-sector digital platforms.

7.1.3 References: Provide contact details for 3 (three client references related to the projects mentioned above).

7.2 Section 2: Technical Proposal (The Solution)

7.2.1 Proposed Architecture: Describe the technical stack (e.g., Azure, AWS, Open Source) and the high-level architecture of the CSO Database.

7.2.2 Data Ingestion Strategy: Explain the methodology for ingesting and merging ~500,000 records from DSD, CIPC, and SARS, including deduplication logic.

7.2.3 Self-Registration & UI: Provide a conceptual overview or wireframes of the web-based search interface and the CSO self-registration portal.

- 7.2.4 M365 Integration: Detail how the solution will integrate with Kagiso Trust's existing SharePoint and Power BI environments.
- 7.2.5 Security & Compliance: Outline the measures to ensure POPIA compliance, data encryption, and secure hosting within South Africa.

7.3 Section 3: Project Management and Methodology

- 7.3.1 Delivery Methodology: Confirm the use of an Agile methodology and describe how the timeline will be managed.
- 7.3.2 Project Team: Provide CVs or profiles of key personnel.
- 7.3.3 Monitoring & Transparency: Confirm the use of a Kanban-style visual tracking tool and the frequency of status reporting.

7.4 Section 4: Financial Proposal (Pricing)

- 7.4.1 Price Quote: Provide a total price cost for the project, inclusive of VAT.
- 7.4.2 Milestone Breakdown: Align the pricing with the three mandatory milestones:
- Milestone 1 (Initiation): 20%
 - Milestone 2 (Development and UAT completion): 50%
 - Milestone 3 (Go-Live): 30%
- 7.4.3 Ongoing Costs: Detail any recurring costs for hosting, licensing, or post-implementation SLA support.

7.5 Section 5: Compliance and Administrative Documents

- 7.5.1 B-BBEE Certificate: Valid B-BBEE verification certificate or affidavit.
- 7.5.2 Tax Compliance: Valid SARS Tax Clearance Certificate.
- 7.5.3 Company Registration: CIPC registration documents.

Submission Method: Email to: tenders@kagiso.co.za in PDF and source format for Excel (if available).

8. Evaluation criteria

Proposals will be evaluated based on the following criteria. Each criterion is assigned a weighting to reflect its importance to the success of the CSO Database project. Only proposals that meet the mandatory requirements will be considered for detailed evaluation.

Criterion	Weighting	Considerations
Functional Requirements	30%	Coverage of KT's requirements, usability, configurability.
Non-Functional Requirements	15%	Cloud readiness, integration, security, scalability.

Vendor Capability	5%	ERP experience, local presence, project team CVs, certifications and accreditations as well as references.
Implementation Approach	15%	Methodology, project plan, change management support.
Cost Proposal	30%	Licensing, implementation, support, TCO.
Governance & Compliance	5%	POPIA compliance, risk management, SLAs.
	100%	

9. General Terms

- 9.1 KT reserves the right to accept or reject any proposal without obligation.
- 9.2 Vendors are responsible for all costs related to proposal preparation.
- 9.3 Proposals must remain valid for 120 days.
- 9.4 Any attempt to influence the evaluation process will result in disqualification.
- 9.5 Confidentiality: All information provided by KT must be treated as confidential.
- 9.6 Stakeholder alignment is essential, especially for alignment across department, functions and capabilities.