TERMS OF REFERENCE FOR THE PROVISION, CONFIGURATION, PILOTING AND SCALING OF AN ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

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1. Background

The National Social Security Fund ("the Fund") is implementing Vision 2035 through a strategy lifecycle of design, planning, execution and evaluation, using the Balanced Scorecard as its framework. Strategy execution is owned and evaluated at three tiers — Tier I (organizational), Tier II (department/function) and Tier III (unit, section and individual) and every staff member is expected to hold a scorecard demonstrating contribution to departmental and organizational objectives. Performance data must be centrally governed, independently quality-assured and reviewed at least quarterly.

The National Social Security Fund Uganda ("the Fund") invites eligible firms to submit expressions of interest for an enterprise performance management system to digitize and strengthen the Fund's performance management lifecycle — measure design, cascading, monitoring, review, calibration, approval and reporting — across organizational, departmental and individual scorecards.

The Fund has undertaken internal discovery and limited feasibility prototyping to clarify the business problem and confirm that a digital solution is practicable.

The current performance management environment spans many measures and scorecards maintained across different teams and formats. This creates duplication, inconsistent measure definitions, weak line-of-sight between tiers, heavy manual consolidation and limited real-time visibility of performance gaps. The Fund's KPI library holds approximately 7,900 records; preliminary analysis indicates substantial duplication requiring controlled rationalization without loss of measurement history or scorecard references.

The Fund is seeking a solution for the complete operating model — governed measure design, scorecard cascading, continuous measurement, evidence-based review, calibration, approval, reporting and improvement — rather than automation of a single form, while preserving clear accountability and auditability.

2. Objectives and Intended Outcomes

The following will be the intended expected outcomes:

- One trusted, centrally governed source of objectives, measures, targets, scorecards, actuals, evidence and approvals.
- Clear line-of-sight from the Fund's Vision and Tier I outcomes down to Tier II and Tier III scorecards.
- Controlled self-service scorecard creation and management for non-technical users.
- Reduced duplicate or inconsistent KPIs, with lineage and history preserved.
- Faster scorecard build, approval, monitoring and reporting cycles.
- Timely dashboards and reports for employees, managers, the Performance Unit, EXCO and the Board.
- Fair, evidence-based performance review, calibration and finalization with full audit trails.
- Enterprise-grade identity, security, privacy, resilience and data-portability controls.

3. Scope of the Opportunity

The opportunity covers solution design, configuration, prototype demonstration, pilot deployment and, subject to successful validation and approval, enterprise rollout and support for approximately 650 staff. The initial pilot is expected to include up to three user departments, with final scope confirmed by the Fund.

3.1 Required Services

The successful provider will be expected to undertake the following:

- Confirm requirements and translate the Fund's policy, scorecard architecture and performance cycle into a configured solution.
- Configure organizational structures, roles, periods, templates, approval workflows, rating logic and reports.
- Cleanse and rationalize the KPI library using controlled, reviewable methods that preserve lineage and history.
- Integrate enterprise identity and agreed source systems via secure APIs or controlled bulk interfaces.
- Migrate agreed master data and historical performance records with reconciliation and sign-off.
- Conduct prototype testing, user acceptance testing, security assurance and a controlled pilot.
- Train administrators, the Performance Unit, managers, employees and technical support teams.
- Provide deployment, warranty, support, maintenance, service levels and continuous improvement.
- Provide full data export, configuration documentation and transition support at contract exit.

3.2 User Groups

User group	Illustrative responsibilities
Performance Unit	Governs the KPI library, assures measure quality, manages cycles, monitors alignment, analyses and reports performance.
EXCO and Chiefs of Department	Own strategic objectives, approve departmental scorecards, review results, calibrate performance and act on gaps.
Line managers	Agree scorecards, review evidence and self-assessments, provide ratings and feedback, manage improvement actions.
Employees	Create/confirm scorecards, update actuals, upload evidence, self-assess, respond to feedback, track approved results.
System administrators and ICT	Manage access, integrations, environments, security, configuration, support and audit records.
Board and authorized reviewers	Access approved strategic performance dashboards and reports within defined permissions.

4. Prototype and Pilot Process

The Fund intends to use a staged, evidence-based process. Detailed dates and the number of shortlisted firms will be confirmed in the procurement schedule.

Stage	Activity	Purpose
Phase 1	EOI	Evaluate eligibility, understanding, proposed solution, technical capacity, delivery approach and evidence.
Phase 2	concept assessment and Prototype challenge	Shortlisted bidders demonstrate a working prototype against a common scenario pack and anonymized/synthetic data. The Fund assesses observed performance, not presentation claims.
Phase 3	Controlled pilot and due diligence	The preferred solution is tested with selected departments, including integrations, security, migration, usability, support and acceptance criteria.
Phase 4	Contracting and scale	Subject to successful pilot, due diligence, approvals and negotiation, the Fund may contract for enterprise deployment, support and maintenance.

4.1 Prototype Principles

- All shortlisted bidders will receive materially equivalent scenarios, data and clarification opportunities.
- The prototype must be working software; mock-ups may supplement but shall not replace executable evidence for mandatory capabilities.
- Bidders shall clearly identify standard functionality, configuration, custom development and roadmap items.
- The Fund may record demonstrations and retain test evidence for evaluation and audit purposes.
- Unless otherwise stated, bidders bear their own costs and risks of participating in the prototype challenge.
- Prototype access and data are governed by confidentiality, security and acceptable-use requirements.

4.2 Indicative Pilot Success Criteria

Outcome	Acceptance evidence
Full lifecycle	At least one representative department completes scorecard creation, validation, submission, review and approval end to end.
Weight integrity	Applicable weights are automatically validated to total 100% before submission.
Alignment	Tier relationships and contribution to higher-level objectives are visible and reportable.
KPI rationalization	An agreed sample of duplicate KPIs is consolidated with human approval, preserved lineage and zero orphaned references.
Measurement	Actuals, evidence, calculations, thresholds and exceptions operate correctly across agreed sample measures.
Review and calibration	Self-assessment, manager review, justified override, calibration, final approval and locking are evidenced.
Self-sufficiency	Authorized non-technical users can create and manage scorecards without routine vendor intervention.
Identity and access	Single sign-on and scoped permissions work for agreed roles and organizational units.
Reporting	The solution produces agreed operational, quarterly and strategic reports from the same controlled data.

Outcome	Acceptance evidence
Security and portability	No unresolved critical security issue remains; agreed exports can be produced in documented, usable formats.

5. Deliverables

No.	Deliverable	Minimum content
1	Discovery and solution blueprint	Validated requirements, process maps, architecture, data model, security model, integration and implementation plan.
2	Configured prototype	Working solution configured for the common test scenarios, with evidence and limitations recorded.
3	Prototype report	Results, gaps, risks, assumptions, user feedback, configuration decisions and recommendations for pilot.
4	Pilot environment	Secure pilot instance, agreed integrations, migrated sample data, configured workflows, dashboards and reports.
5	Training and knowledge transfer	Role-based materials, administrator and user training, technical documentation and handover records.
6	Pilot acceptance report	Test evidence, defects, remediation, adoption results, security assurance and signed acceptance against agreed criteria.
7	Enterprise rollout plan	Phased deployment, migration, change management, support, service levels, governance and total cost.
8	Production service (subject to award)	Enterprise deployment, warranty, support, maintenance, reporting and continuous improvement.

6. Phase 2: Bidder Response Requirements

The shortlisted bidders shall be required to submit a PowerPoint deck not exceeding 15 slides. Annexes do not count toward the slide limit. Marketing material that does not respond directly to the requirements may be disregarded.

6.1 Main Concept Deck

- Understanding of the Fund's performance management problem and desired outcomes.
- Proposed solution concept, differentiators and fit with the Balanced Scorecard and Tier I–III model.
- Illustrated end-to-end workflow and system architecture.
- Approach to KPI governance, duplication reduction and lineage preservation.
- Approach to identity, integration, security, data residency, privacy, resilience and responsible AI.
- Prototype approach, assumptions to be tested and evidence to be produced.
- Pilot and enterprise implementation roadmap, change management and knowledge transfer.
- Indicative commercial model and principal cost drivers (excluding any separately requested financial submission).
- Key risks, dependencies and proposed mitigations.

6.2 Required Annexes

- Company profile and ownership information.
- Eligibility and compliance documents listed in section 9.1.
- Completed compliance response matrix in the format at Appendix A.
- Relevant assignments and client references, preferably for enterprise performance, strategy execution, HR performance or comparable governed workflow platforms.
- Proposed team structure, CVs and role allocation.
- Product roadmap identifying available, configurable, custom and planned capabilities.
- Security and architecture pack: hosting, data flows, sub processors, certifications or independent assurance, backup and disaster recovery.
- Support and service-level proposal.
- Disclosure of conflicts, prior involvement with the Fund, and any reliance on subcontractors or consortium members.

6.3 Technical Evaluation

Criterion	What will be assessed	Marks
Understanding of the problem and desired outcomes	Demonstrates understanding of the Fund's policy, three-tier governance, current pain points and intended outcomes.	10
Functional solution fit	Responds to the mandatory and desirable requirements, including governed KPI library, cascading, workflows, measurement, review, calibration, reporting and improvement plans.	30
Working prototype challenge	Demonstrates the common scenarios reliably and transparently, with clear distinction between standard, configured and custom capability.	25
Architecture, security, privacy and integration	Presents a credible enterprise architecture, identity integration, data protection, residency options, resilience, auditability and portability.	15
Implementation, adoption and knowledge transfer	Provides a practical discovery, migration, testing, pilot, rollout, training and change-management approach.	10
Firm and team capability	Shows relevant delivery evidence, suitable roles and sufficient capacity to implement and support the solution.	5
Support, scalability and commercial sustainability	Provides credible service levels, scale, maintainability, exit arrangements and a sustainable commercial model.	5

Total: 100 marks.

The proposed overall technical pass mark is 75 out of 100. A bidder must also obtain at least 60% of the combined marks available for functional solution fit and the working prototype challenge. Eligibility is assessed on a pass/fail basis. The Fund will conduct due diligence and reference checks before proceeding.

7. Commercial, Legal and Governance Principles

- The Fund is open to a license, subscription, managed service or other sustainable model, provided all fees, dependencies, limits and cost drivers are transparent.

- The bidder shall identify pre-existing intellectual property and proposed rights for Fund-funded configuration, integrations, documentation and custom development. The Fund shall own its data, evidence, scorecards, measures, rules and records.
- Fund data may be used only for authorized contract purposes and may not train a public, shared or third-party model without written approval. Subcontractors, cloud providers and AI providers must be disclosed.
- The agreement shall address confidentiality, security, privacy, audit, service levels, continuity, warranty, indemnity, termination assistance and data return or deletion.
- Any optional external commercialization or revenue-sharing arrangement shall be evaluated separately and shall not influence the technical evaluation of the Fund's internal requirement.
- The Fund reserves the right to negotiate scope and terms, verify claims, cancel or amend the process with appropriate approval, and decline to proceed to contract.

Appendix A — Compliance Response Matrix

Bidders shall reproduce and complete this matrix for every requirement in sections 5.1 and 5.2. Unsupported statements may receive no credit.

Ref	Comply	Delivery status	Evidence / reference	Gap and delivery date
F01	Yes / Partial / No	Standard / Configured / Custom / Roadmap	Page, screen or demo reference	State any limitation and committed date
...	Continue for every F and T requirement			

Delivery-Status Definitions

Status	Definition
Standard	Available in the current generally available product without bidder-specific change.
Configured	Available through supported configuration that remains maintainable through product upgrades.
Custom	Requires bidder-specific development, with scope, cost, delivery date and upgrade impact stated.
Roadmap	Not currently available. Bidder shall state planned release, dependencies and whether the commitment is contractual.

Appendix B — Prototype Challenge Scenarios

The final scenario pack will be issued to shortlisted bidders. The following scenarios indicate the expected breadth of the challenge and may be refined without changing the underlying evaluation objectives.

No.	Scenario	Minimum demonstration
1	KPI governance	Create a category, objective and KPI with a complete definition; route for quality review; publish for authorized use; demonstrate role/scope restrictions.
2	Duplicate consolidation	Identify overlapping KPIs in a supplied dataset, propose a canonical KPI, obtain human approval, merge records and demonstrate preserved history and rewritten references.

No.	Scenario	Minimum demonstration
3	Tiered scorecard cascade	Create/load a Tier I measure, cascade to a Tier II department and Tier III employee, demonstrate contribution and shared or inherited ownership.
4	Scorecard creation	A non-technical user selects approved KPIs, sets targets and weights, receives validation that each level totals 100%, and submits for review.
5	Workflow and amendment	A manager returns a scorecard for correction, approves the revision, then processes a controlled mid-period change with reason and version history.
6	Measurement and evidence	Capture actuals via manual and bulk/API input, calculate achievement and variance, attach evidence, flag a missing or inconsistent data point.
7	Review and calibration	Complete self-assessment, manager review, justified override, calibration adjustment, final approval and period lock with full audit trail.
8	Reporting	Generate employee, department, Tier I and quarterly strategic reports, and show a Multi-Year Outlook trend from the same controlled data.
9	Performance improvement	Trigger a performance improvement plan with outcomes, actions, check-ins, resources, progress and final status.
10	Identity, security and export	Demonstrate single sign-on design, scoped access, audit logs, data-residency architecture and complete export of a sample record set with metadata.

Prototype Evidence Checklist

- Working demonstration using the common data pack.
- Test results mapped to requirement references.
- Architecture and data-flow diagram for the demonstrated configuration.
- List of standards, configured, custom and roadmap components.
- Known limitations, dependencies and remediation plan.
- Indicative pilot effort, timetable, team and commercial assumptions.