Municipal Councillors Pension Fund (“the FUND”)

Request for Proposal (RFP No: 01/2026)

PANEL OF ATTORNEYS FOR PROVISION OF LEGAL SERVICES (“THE SERVICES”)

TO THE

MUNICIPAL COUNCILLORS PENSION FUND (“THE FUND”)

Closing Date: 21 August 2026

Time: 16:00

(LATE RFP’s WILL NOT BE ACCEPTED)

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1. INTRODUCTION

The Municipal Councillors Pension Fund (MCPF) was established on 01 May 1988 in terms of the Pension Benefits for Councillors of Local Authorities Act No. 105 of 1987. The MCPF is a Defined Contribution (DC) Pension Fund, as defined in legislation, committed to effectively and efficiently providing benefits to members and beneficiaries.

The Fund hereby invites proposals from suitably qualified and competent legal firms and pension law experts service providers to deliver legal services to the Fund. The Fund will select a service provider at its discretion, under the procedures described in this Request for Proposal ("**RFP**") document. It also reserves the right not to select any service provider, or a different one, as it may decide.

2. PURPOSE OF THIS RFP

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

3. BACKGROUND TO THE FUND

The Fund is a registered retirement Fund in terms of section 4 of the Pension Funds Act, 24 of 1956 ("**the Act**") and has its own legal personality. The Fund invests its assets with various investment managers and in terms of its investment policy statement, it has holdings both locally and offshore.

The Fund fully endorses and supports Broad-Based Black Economic Empowerment (B-BBEE') principles and Social Responsible Investment, which is evident in its activities. It also awards contracts for services in accordance with a system that is fair, equitable, transparent, competitive, and cost effective.

The object of this RFP is to provide details relevant to the legal services required from suitably qualified and competent service providers to submit proposals to the Fund for the provision of legal services.

4. FUND OVERVIEW

A. CONSTITUTION OF THE BOARD OF TRUSTEES

Trustees	Number of Trustees **(13)**
Employer appointed Trustees	9
Member appointed Trustees	2
Independent Trustees	2

B. FUND STRUCTURE

FUND TYPE	**DEFINED CONTRIBUTION PENSION FUND**
Active members (number)	3 968
Assets Under Management (AUM)	R2 billion
Number of pay points	197
Fund contribution rates	15% and 28.75%
Additional voluntary contributions	Yes
Eligibility	Must be a Municipal Councillor
Retirement benefits	Yes
Death benefits	3 x Annual Pensionable Salary
Funeral benefits	R40 000.00
Pensioners	None
Housing loans	Yes
Administration services	Self-administered
Reporting	Board

5. INSTRUCTIONS FOR COMPLETING THIS RFP

5.1. CONTRACTUAL COMMITMENT

No commitment of any kind, contractual or otherwise, shall exist unless and until a formal written agreement has been executed by or on behalf of the Fund and the successful service provider. Any notification of preferred bidder status by the Fund shall not give rise to any enforceable rights by the bidder. The Fund may cancel this RFP at any time.

The Fund reserves the right at its sole discretion, and at any time, to amend, deviate from, postpone, discontinue or terminate the procurement process without incurring any liability whatsoever to any other party.

The Fund reserves the right not to award this tender to the highest ranked or highest scoring bidder. The Fund reserves the right to reject any and/or all proposals in response to this RFP. The Fund reserves the right not to make an appointment and that no correspondence will be entered into regarding the reasons for the Board of Trustees' decision to appoint certain bidders and not to appoint others.

5.2. RFQ VALIDITY

All proposals received from a potential service provider by the closing date and time will remain valid for a period of ninety (90) days after the closing date.

5.3. IMPORTANT DATES

Release of RFP	**29 July 2026**
Last day for queries	**07 August 2026**
Responses to queries received	**14 August 2026**
Closing date and time for submission of proposals	**21 August 2026**

5.4. QUERIES

All queries must be addressed in writing only to the Principal Officer, Mr Wanda Ndabeni wanda@mcpf.co.za . Any other communication relating to the RFP should be directed to this email address in writing only. Failure to observe this condition may result in the disqualification of the tendering party.

5.5. AUTOMATIC DISQUALIFICATION

If it is found that the bidder or person(s) acting on behalf of the bidder has, in the RFP or during the process of evaluation, selection, etc.:

- Misrepresented or altered material information in whatever way or manner;
- Promised, offered, or made gifts, or benefits to any employee or Trustee of the Fund;
- Canvassed, or lobbied in order to gain unfair advantage;

- Committed fraudulent acts; or
- Acted dishonestly and/or in bad faith.

such bidder and/or person(s) shall automatically be disqualified from further participation in the procurement process. In addition, the Fund reserves the right to report such conduct to the appropriate authority. Any attempts by a bidder to directly or indirectly canvas any Trustee or personnel of the Fund for support may result in disqualification of their bid/proposal.

5.6. FORMAT OF SUBMISSION OF PROPOSALS

Bidders are required to submit detailed bid responses in accordance with the submission format specified below (each schedule must be clearly marked):

SECTION	TITLE
A.	Cover page: Indicating the RFP Number, name, description and introduction of the bidder.
B.	Executive Summary of the Proposal
C.	Company Background and track record
D.	Proposed team members and their track record
E.	Proposed services
F.	Key deliverables and timeline for delivery
G.	Pricing Structure
H.	Original and valid Tax Clearance Certificate
I.	Valid B-BBEE Certificate
J.	Four letters of reference - 2 current and 2 former clients
K.	Existing Professional Indemnity and Fidelity Guarantee insurance confirmations
L.	Most recently audited Annual Financial Statements
M.	Data Security Disclosure: • Confirmation of breach procedure

	• Measure and processes in place to safeguard special, personal, and confidential information; • Confirmation of compliance with Protection of Personal Information Act
N.	Conflict of Interest Policy
O.	Supporting documentation

Note: Failure to provide any one of the documents required in A to O above will lead to an immediate disqualification of the service provider from the tender process.

5.6.1. Completed Questionnaire which includes 4 sections:

a. Technical Functionality
b. Governance and Ethics
c. B-BBEE Confirmation
d. Price Proposal

5.7. SUBMISSION OF PROPOSALS

Take note of the requirements listed below, as failure to meet these requirements will lead to automatic disqualification from the RFP process.

- All documentation submitted in response to this RFP must be in English.
- The Questionnaire should be completed in the format provided.
- All bidders should check the numbers of the pages of this RFP to satisfy themselves that none are missing. No liability will be accepted by the Fund with regard to anything arising from the fact that pages are missing.
- The closing date for the submission of proposals is **21 August 2026** at **16h00**. Under no circumstances will late tenders be accepted. As mentioned above, the completed RFP must be submitted electronically to the following email address: tenders@mcpf.co.za

5.8. SUB-CONTRACTING

The successful bidder will be prohibited from sub-contracting, conveying, assigning or otherwise disposing of any contract resulting from this RFP, its rights, title, or interest therein or its power to execute such agreement to any other company, corporation, or entity without the prior written consent and approval of the Fund.

5.9. PROPOSAL COSTS

All costs and expenses incurred by the bidder relating to their participation in, and preparation of this proposal process shall be borne by the bidder exclusively. The Fund assumes no responsibility or liability for costs incurred by the bidders in preparing or submitting their proposals.

6. QUALIFYING CRITERIA

Bidders will be evaluated according to the Fund's adopted Procurement Policy.

7. BID EVALUATION

All bids will be evaluated against the Fund's adopted Procurement Policy. Under this Policy, bidders will be scored out of a total of 100 points as follows:

STAGE	POINTS
Technical Functionality	45
Governance and Ethics	15
B-BBEE	10
Price	30
Total	**100**

8. PROVISION OF LEGAL ADVISORY SERVICES

The Fund requires the following services:

8.1. Drafting of legal documents for the Fund.

8.2. Provide legal guidance to Trustees on matters pertaining to discharging their normal duties and obligations in terms of Section 7D of the Pensions Fund Act.

8.3. Provide legal support services on all Pension Laws, legislation and regulations that have impact on Fund operations to ensure effective compliance to mitigate risk.

8.4. Provide legal support to the Fund in relation to Section 13A matters as required by the Pension Fund Act.

8.5. Ensuring compliance with legislative requirements and Fund's governing documentation.

8.6. Standardization of contracts/procurement terms and conditions.

8.7. Provide legal support to contracting and procurement practices.

8.8. Contract drafting, reviews, identify and manage contractual risks.
8.9. Provide legal support to the Principal Officer
8.10. Provide legal support in the management of the Fund.
8.11. Provide legal support services for all industrial relations matters including disputes
8.12. Provide legal support on all labour laws, legislation and regulations that have impact on the Fund's operations to ensure compliance and to manage risk.
8.13. Provide legal opinions.
8.14. Represent the Fund on litigious matters.

Where the bidder responds to the above, their duties shall entail, amongst others, ensuring the services provided to the Fund adheres to all Rules and regulations, as well as Pension Fund Act 24, 1956 protocols and standards, Best Industry Practice, the Fund's Rules.

9. QUESTIONNAIRE AND SCORE

	SECTION	**POINTS**
9.1	**TECHNICAL FUNCTIONALITY**	**45**
A	**COMPANY INFORMATION** ▪ Brief history of the company. ▪ Contact details of the company and contact person. ▪ CIPC registrations documents. ▪ Core business of the company. ▪ Organisational structure organogram indicating holding company, subsidiaries, sister companies etc.	
B	**EXPERIENCE IN LEGAL ADVISORY SERVICES** ▪ Number of years the firm has been providing the required services. ▪ Experience of the team to be assigned to provide required services. ▪ Number of retirement Funds being provided related services, which are currently managed by the bidder. ▪ Provide a list of 2 current clients and 2 former clients to whom the firm provided/provides this/similar service - *Section J above.*	

C	**PEOPLE** ▪ Total number of full-time people employed within the business. What is the percentage of black staff and what is the percentage of female employees? ▪ What is your succession plan within the team? ▪ Please provide an organogram of your servicing structure, confirming that their respective qualifications have been appropriately verified. ▪ Do you have any staff capacity constraints? *Include overview of proposed team members and their track record – Section D*	
D	**REPORTING, COMMUNICATION AND SERVICING** ▪ Please provide details on the type and frequency of reporting you will provide to the Fund. ▪ Are reports customisable? ▪ What is your turnaround time in respect of queries? ▪ Please provide details on your client servicing model. ▪ Please provide details on your organisations cyber security and cyber resilience supporting the service.	
9.2	**GOVERNANCE AND ETHICS**	**15**
A	**CONFLICTS OF INTEREST** ▪ Does the firm provide any other services to the Fund? If so, please describe the services provided. ▪ Does the firm have any rebate/commission or similar arrangements in place with service providers? If so, please describe the nature of these relationships. ▪ Does the firm have any strategic alliances with other financial services providers? If so, please describe. ▪ Does your firm have a contractual fee sharing arrangement with any current service provider to the Fund? If so, please provide more details.	
B	**GOVERNANCE** ▪ Has the firm ever received a qualified audit? ▪ Has the firm ever been penalised by any regulatory body?	

	▪ Is the firm engaged in any dispute and or investigation by the Authorities, Legal Practice Council or any regulatory body? ▪ Has the firm or any of its directors, shareholders or staff ever been fined for wrongdoing? ▪ Is the firm or any of its directors, shareholders or staff under investigation by any regulatory authority for wrongdoing? *If the answer is yes to any of the questions above, please provide full detail.* ▪ Provide details of corporate governance structures in place and mechanisms to mitigate governance risk within the organisation. *Please provide a copy of your Conflict-of-Interest Policy – Section O* ▪ What is the level of your Professional Indemnity and Fidelity Guarantee Insurance? Please provide copies of cover.	
C	**MEMBERSHIP OF PROFESSIONAL BODIES** • Is the firm a member of a professional body? If so, please list the organisations to which the firm is a member.	
9.3	**B-BBEE CONFIRMATION**	**10**
A	▪ Ownership structure – provide full transparency and indicate black ownership level, shareholders and state what percentage is held by employees of the firm and what % is held by parties outside the firm. Board of directors – indicate independent non-executive, executive, gender and race profile. ▪ Only bidders with a minimum B-BBEE contribution level of 3 (i.e. level 1, 2 or 3) and minimum black ownership of 30% will qualify to provide services to the Fund. The maximum points earned by bidders based on their B-BBEE contribution level is as follows: Level 1 = 10 Level 2 = 5 Level 3 = 0 ▪ *Provide certified proof of black ownership (full B-BBEE ratings report) – Section I - Please include your firm's Transformation Policy*	

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PANEL OF ATTORNEYS FOR PROVISION OF LEGAL ADVISORY SERVICES TO THE MCPF (“SERVICES”) (SECTION 8 ABOVE)

- The Fund’s Terms of Reference **for provision of legal advisory services to the MCPF has** been clearly defined in Section 8 of this document.
- Please provide a total fee proposal for the delivery of the listed services in the form of a Rand value fee. (Please note that the Fund will only provide inflation-related annual increases, subject to satisfactory performance, where applicable).
- Clearly state if there are any other fees that the Fund could be charged for such as travelling costs, administration disbursements, etc.

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POINTS WILL BE DETERMINED AS FOLLOWS:

$$Ps = 25 * \left[1 - \frac{Pt - Pmin}{Pmin}\right.$$

Where: -

Ps = Points scored by the Provider

Pt = Price quoted by the Provider (inclusive of interest rate band for the Fund’s member and any additional enhanced returns for the Fund)

Pmin = Lowest price quoted by the group of Providers

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DocuSigned by:

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Mr Wanda Ndabeni
Principal Officer
MCPF
wanda@mcpf.co.za

Mr Lesetja J Dikgale
Chairperson of the Board
MCPF
dikgalejl@gmail.com

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