

REQUEST FOR PROPOSAL (RFP)

FOR

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS), HR/LABOUR
COMPLIANCE

&

PAYROLL MANAGED SERVICES

FOR

UBI Services Limited

504-506, 5th Floor, Centrum, S. G. Barve Road, Wagle Estate, MIDC,
Thane (W), Pincode – 400604.

Index

Sr. No	Content	Page No
1	Cover Page	1
2	Index	2
3	Request For Proposal (RFP) Notice	3
4	SECTION I	5
5	SECTION II	11
6	SECTION III	14
7	SECTION IV	20
8	SECTION V	21
9	Annexure-I	25
10	Annexure-II	29
11	Annexure-III	30
12	Annexure-IV	31
13	Annexure-V	32
14	Annexure-VI	34
15	Annexure-VII	36
16	Annexure-VIII	38

Request For Proposal (RFP) Notice

RFP Ref. No.	UBISL/RFP/HR/001/2024-25/001/Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed Services dt. 19 th November 2024
RFP Issue Date	19th November 2024
Last date for bid submission	3rd December 2024 06:00 PM
Extended date for bid submission	07th December 2024 06:00 PM
Date of opening of Technical bids	11th December 2024
Date of opening of Financial bids	16th December 2024
Bid Validity period	180 days from the last date for bid submission
Address for Bid Submission & Contact Details	Address: 504-506, 5th Floor, Centrum, S. G. Barve Road, Wagle Estate, MIDC, Thane (W), Pincode – 400604. Contact: +91 9819910155

DISCLAIMER

The information contained in this Request for Proposal (RFP) document is provided to the applicants on the terms and conditions set out in this RFP document.

The RFP document is neither an agreement nor an offer and is only on invitation by UBI Services (“UBISL” or the “Company”) to the interested parties for submission of proposal to this RFP. The purpose of this RFP is to provide the Bidder(s) with information to assist the formulation of their proposals. This RFP does not claim to contain all the information each Bidder may require. Each Bidder should conduct its own investigations & analysis and should check the accuracy, reliability and completeness of their information in this RFP and where necessary, obtain independent advice from independent sources. The Company, its employees and advisors make no representation or warranty and shall incur no liability to any person, including the Bidder, under any law, statute, rules or regulations or tort, principles of restitution or unjust enrichment or otherwise for any loss, damages, cost or expense which may arise from or be incurred or suffered on account of anything contained in this RFP or otherwise, including as to the accuracy, adequacy, correctness, reliability or completeness of this RFP and any assessment, assumption, statement or information contained therein or deemed to form or arising in any way for participation in this bidding process. UBI Services Ltd. (UBISL) shall in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP. UBISL reserves the right to reject any or all the request of proposals received in response to this RFP document at any stage without assigning any reason whatsoever. UBISL does not accept any liability of any nature whether resulting from negligence or otherwise, howsoever caused arising from reliance of any Bidder upon the statements contained in this

RFP. The Bidder is expected to examine all instructions, forms, terms and specifications in this RFP. Failure to furnish all information required under this RFP or to submit a Bid not substantially responsive to this RFP in all respect will be at the Bidder's risk and may result in rejection of the Bid. The issue of this RFP does not imply that UBISL is bound to select a Bidder or to award the contract to the Selected Bidder, as the case may be, for the Project and UBISL reserves the right to reject all or any of the Bids or Bidders without assigning any reason whatsoever before issuance of purchase order and/or its acceptance thereof by the successful Bidder as defined in Award Criteria and Award of Contract in this RFP.

Please note that the decision of UBISL shall be final, conclusive and binding on all the Parties & we are not answerable to anyone.

SECTION I

1. INTRODUCTION

UBI Services Ltd (UBISL) is a wholly owned subsidiary of Union Bank of India. Union Bank of India is one of the leading public sector banks which is engaged in providing services of wide gamut of products and services being made available to its valuable clientele as per their requirements.

UBI Services Ltd., having its Head Office at 504-506 Centrum, S.G. Barve Road, Wagle Estate MIDC, Thane-400 604 is engaged in sourcing of Housing Loans and Vehicle Loan leads to Union Bank of India. The Company is in the process of expanding its marketing activities from sourcing of/ canvassing for Housing / Vehicle Loans to marketing of Credit Cards, Mortgage loans, Education loans, Gold loans, MSME Loans, other back office support, including data entry for Account opening and Centralized Back Office Payment etc. The Company has at present 9 Regional Offices and has market presence in 50 locations PAN India.

This request for proposal document (“RFP”) has been prepared solely for the purpose of enabling UBISL to procure Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed Services. The RFP document is not a recommendation, offer or invitation to enter into a contract, agreement or other arrangement in respect of the solution. The provision of the solution is subject to appropriate documentation being agreed between UBISL and the eventual successful bidders.

Meaning of terms used in RFP document:

Following terms are used in the document interchangeably to mean:

1. “UBISL” means “UBI Services Ltd.”
2. “RFP” means this RFP for “Procurement of Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed Services” in its entirety, inclusive of any addenda that may be issued by UBISL from time to time.
3. “Assignment” means the work to be performed by the selected Bidder pursuant to the Contract.
4. “Contract” or “Agreement” means the contract to be signed along with all the attached documents and the Appendices, consequent to the completion of the proceedings as per the RFP.
5. “Day” means calendar day.
6. “Proposal / Bid / Tender” means Response to the RFP Document.
7. “Successful / Selected Organization or Bidder/ Recipient/Respondent” means the organization/ bidder selected as the successful Bidder by the UBISL in accordance with this RFP.

2. INFORMATION PROVIDED

The RFP document contains statements derived from information that is believed to be true and reliable at the date obtained but does not purport to provide all of the information that may be necessary or desirable to enable an intending contracting party to determine whether or not to enter into contract or arrangement with UBISL in relation to the empanelment of manpower agencies. Contracting party is advised to conduct its own due diligence before submission of bid. Neither UBISL nor any of its directors, employees, agents, representatives, contractors, or advisors give any representation or warranty (oral or written), express or implied, as to the accuracy, updating or completeness of any writings, information or statement given or made in this RFP document.

3. FOR THE RESPONDENT ONLY

The RFP document is intended solely for the information of the party to whom it is issued (“the Recipient” or “the Respondent” or “the bidder”).

4. CONFIDENTIALITY

The RFP document is confidential and is not to be disclosed, reproduced, transmitted, or made available by the Recipient to any other person. The RFP is provided to the Recipient on the undertaking of confidentiality given by the Recipient to UBISL. UBISL may update or revise the RFP document or any part of it. The Recipient acknowledges that any such revised or amended document shall be received subject to the same confidentiality undertaking. The Recipient will not disclose or discuss the contents of the documents with any officer, employee, consultants or other person associate or affiliated with the Company without the prior written consent of the Company.

Disclosure of receipt of any part of the aforementioned information to any third party will result in the disqualification of the Recipient, pre-mature termination of the contract, or legal action against the Bidder for breach of trust.

5. NO LEGAL RELATIONSHIP

No binding legal relationship will exist between any of the Recipients/ Respondents and the Company until execution of a contractual agreement.

6. RECIPIENT’S OBLIGATION TO INFORM ITSELF

The Recipient must apply its own care and conduct its own investigation and analysis regarding any information contained in the RFP document and the meaning and impact of that information. Failure to furnish all information required by the Bidding Document or to submit a Bid not substantially responsive to the Bidding Document in all respect will be at the Bidder’s risk and may result in rejection of the Bid.

7. EVALUATION OF OFFERS

Each Bidder acknowledges and accepts that the Company may, at its sole and absolute discretion, apply criteria like independent assessment of the market reputation and perception of ability to perform, but not limited to those selection criteria set out in this RFP document.

The issuance of RFP document is merely an invitation to offer and must not to be construed as any agreement or contract or arrangement nor would it be construed as material for any investigation or review to be carried out by a Recipient. The Recipient unconditionally acknowledges by submitting its response to this RFP document that it has not solely relied on any idea, information, statement, representation or warranty given in this RFP document.

8. ERRORS AND OMISSIONS

Each Recipient should notify UBISL of any error, fault, omission or discrepancy found in this RFP document. However, such notification must pertain to proposal related details.

9. ACCEPTANCE OF TERMS

The Recipient, by responding to this RFP document of the Company, will be deemed to have read the whole RFP document and have unconditionally accepted the terms and conditions as stated.

10. COSTS BORNE BY THE RESPONDENTS

All costs and expenses / charges / fees/ incurred by the Respondent in any way associated with the development, preparation and submission of responses, including but not limited to attendance of meetings, discussions, etc or for providing any additional information required by the Company will be borne entirely and exclusively by the Respondent.

11. PURPOSE AND SCOPE OF THE RFP

The purpose of this RFP is to inform potential Bidders of a business opportunity and to solicit proposals for Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed Services. The purpose of this RFP is to appoint company (hereafter referred to as “Vendor”) for providing requisite Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed Services. The contract will be for 03 (Three) Years. The company reserves its rights to change the assignment scope considering the size and variety of the requirements and changing business conditions. Detailed Scope of work is given in SECTION III.

12. RFP SUBMISSION

- i) RFP will be available on the Company’s website www.ubisl.co.in
- ii) The proposal should be prepared in English in pdf format. All correspondence will be in English.
- iii) The Bid shall be typed in indelible ink and shall be signed by the Bidder or Person or persons duly authorized to bind the Bidder to the contract. The person or Persons signing the Bids shall put their initial on all pages with their rubber stamp of the company while submitting Bids. Overwriting is strictly not permitted in the Bids or else may get rejected. The Company reserves the full right to accept or reject the Bids not conforming to the above.
- iv) The RFP response document alongwith all Annexures should be submitted in physical copies in sealed envelopes in two sets in original. **Envelope-I** to be superscribed as “Technical Bid for the Human Resource Management System, HR/Labour Compliance and Payroll Managed Services for UBISL”. **Envelope-II** to be superscribed as “Financial Bid for the Human Resource Management System, HR/Labour Compliance and Payroll Managed Services for UBISL”. The Technical Bid Envelope & the Financial Bid Envelope prepared as above are to be kept in a single sealed envelope superscribed as "Tender for Human Resource Management System, HR/Labour Compliance and Payroll Managed Services for UBISL".
The tender prepared by the Bidder, as well as all the correspondence and documents relating to the Tender exchanged by the Bidder and the Company and supporting documents and printed literature shall be in English language only.

The technical bid should consist of the following:

- (i) A letter on bidder's letterhead mentioning:
 - a. Details of technical competence and experience of the bidder
 - b. Certifying that the period of the validity of the bid is 180 days from the target date of submission of bid.
 - c. Supporting documents in respect of Eligibility Criteria as mentioned in Annexure I.
 - d. Supporting Documents for Technical Evaluation.
- (ii) Bidders information as per Annexure I on bidder's letter head.
- (iii) Letter of Undertaking as per Annexure III on bidder's letter head.
- (iv) Audited balance sheets and profit and loss account statement for last 3 years
- (v) A copy of board resolution or power of attorney showing that the signatory has been duly authorized to sign the tender document.
- (vi) Response to all points of the Technical evaluation format as per Annexures enclosed.
- v) The sealed envelopes should be submitted to the below mentioned address by Speed Post/Courier/Registered AD or hand delivered: -

UBI SERVICES LTD.
504-506, CENTRUM IT PARK,
S.G. BARVE ROAD, WAGLE ESTATE (MIDC)
THANE (WEST)-400604

Bids submitted anywhere else would be liable for rejection.

For any queries related to the said bid, contact Mr. Gaurav Bamania +91 9819910155.

Bidders may enquire about any query related to this tender before 29.11.2024 Any query related to the tender will not be entertained after 29.11.2024.

- vi) All the pages of the proposals are to be numbered and be signed by the authorized signatory on behalf of the Bidder. The number should be a unique running serial number across the entire document in Page X of Y format, where X is the current page number and Y is the total number of pages.

Please note that in the following cases, the Company, in its absolute discretion may reject the bids received from the bidder:

- a. Submission of Bid after the Time stipulated in this RFP Document.
 - b. Misleading/ incomplete information/ submission of improper/ incomplete documentation.
 - c. Bid submission without bidder's name.
 - d. Envelopes are not in order as directed in this document.
- vii) Respondents seeking clarification /queries should address it to the nominated person at the email ID: tenders@ubisl.co.in
 - viii) In the following circumstances, the Company will have the discretion to reject the entire bid or accept the bid with some conditions stipulated by the Company.

Related Parties –

In the following circumstances, the Company will have discretion to reject the Proposal/ response or accept the Proposal/ response with some conditions stipulated by the Company:

- a. Proposal/Response submitted by holding company and its subsidiary.
- b. Proposal/Responses submitted by two or more companies having common director(s).
- c. Proposal/ Responses submitted by two or more partnership firms/ LLPs having common partners.
- d. Proposal/ Responses submitted by two or more companies having the same group of promoters/ management.
- e. Any other Proposal/ Response in the sole discretion of the Company, which is in the nature of multiple bids.
- f. Emailed copies of any submission are not acceptable and shall be rejected by the Company.
- g. Only one bid shall be accepted from one vendor. In case vendor is submitting more than one bid all the bids submitted by the vendor shall be disqualified.

13. REGISTRTAION OF RFP SUBMISSION

RFP document should be kept valid for evaluation for a period of 90 days from the date of submission. The company may ask further extension of validity by email if required.

If any query related to Bid process, or specific clause you can send email to tenders@ubisl.co.in The company will reply to individual and notify the shortlisted Bidders individually by email as soon as practicable, about the status of the RFP evaluation process.

14. RFP VALIDITY PERIOD

RFP document should be kept valid for evaluation for a period of 90 days from the date of submission. The company may ask further extension of validity by email if required.

If any query related to Bid process, or specific clause you can send email to tenders@ubisl.co.in The company will reply to individual and notify the shortlisted Bidders individually by email as soon as practicable, about the status of the RFP evaluation process.

15. LATE RFP SUBMISSION

Timely submission of responses is strongly encouraged and recommended. Tender submissions after the bid submission date shall be documented by the Company and may be considered and evaluated/rejected at the absolute discretion of the Company. However, the Company has no obligation to accept or act on any reason for a late Tender response. The Company has no liability to any Respondent who lodges a late tender submission for any reason whatsoever including tender responses taken to be late only because of another condition of responding.

16. REQUESTS FOR INFORMATION/ CLARIFICATIONS

Respondents are required to direct all communications related to this RFP to:

RFP CO-ORDINATOR
504-506, CENTRUM IT PARK,
S.G. BARVE ROAD, WAGLE ESTATE (MIDC)
THANE (WEST)-400604
Phone : +91 9819910155
[Email- tenders@ubisl.co.in](mailto:tenders@ubisl.co.in)

The Company, may, in its absolute discretion seek additional information or material from any Respondents after the RFP closes and all such information and material provided must be taken to form part of that Respondent's response.

The Company is not bound to reply to the queries not pertaining to this RFP. Replies shall be at Company's discretion. Company's replies shall be final and acceptable to all bidders.

17. COMPANY'S RIGHT TO ACCEPT AND/ OR REJECT ANY OR ALL BIDS

UBISL reserves the right to accept or reject any Bid in part or in full or to cancel the Bidding process and reject all Bids at any time prior to contract award, without incurring any liability to the affected Bidder or Bidders or any obligation to inform the affected Bidder or Bidders of the grounds for the Company's action. The Company shall notify Respondents in writing (as soon as practicable) if the Respondent's submission has been rejected. The Company is not obliged to provide any reasons for any such rejection. The final outcome of the RFP shall be communicated to the empanelled bidders after opening and necessary processing of commercial bids of empanelled bidders. No separate communication will be issued by the Company.

18. ELIGIBILITY CRITERIA

Interested Bidders, who are providing solution as explained in Section II hereof and meeting the Eligibility Criteria may respond to this RFP.

The Bidder needs to comply with all the eligibility criteria mentioned above to be evaluated for Technical evaluation. Non-compliance to any of these criteria would result in outright rejection of the bidder's proposal. The bidder should enclose proof in support of all eligibility criteria while submitting the Bid Proposal, failing which the Bid Proposal will not be considered for further evaluation. There is no restriction on the number of credentials a bidder can provide, however all credentials should be appropriately bound, labelled and segregated in the respective areas.

During evaluation of the Tenders, the Company, at its discretion, may ask the bidder for clarification in respect of its tender. The request for clarification and the response shall be in writing, and no change in the substance of the tender shall be sought, offered, or permitted.

The Company may, at its own discretion relax one or more of the conditions for the vendors who have already provided similar services to another Company.

Bid is open to all Bidders who fulfil the eligibility criteria. The bidder has to submit the details of eligibility criteria as per Annexure I.

19. DISQUALIFICATION

Any form of canvassing / lobbying / influence / query regarding short listing etc. will be a disqualification.

SECTION II

ELIGIBILITY CRITERIA

The RFP Bids will be evaluated by the Company based on their competitiveness, suitability and IT compliances to the Company's requirement.

1. The selection of the bidder will be restricted to well established HRMS, HR/Labour Compliance & Payroll Managed Services companies capable of carrying out the above work and having already carried out similar work in reputed organizations from BFSI sector.
2. The bidder should have experience in successfully implementing and supporting HRMS, HR/Labour Compliance & Payroll Managed Services in BFSI Sector during last five financial years of value more than Rs. 25 lakhs during the period 01st Apr 2019 to 31st Mar 2024. The copies of Purchase/ Work Orders/ Satisfactory Completion certificates are required to be enclosed with the technical bid.
3. The bidder must have minimum 5 years' experience of providing HRMS, HR/Labour Compliances & Payroll Managed Services across India.
4. The bidder should have minimum annual turnover of Rs 500.00 lakhs and minimum net worth of Rs. 2500.00 lakhs in each of the last 3 financial years (2021-22, 2022-23 and 2023-24). The Bidder should submit audited Financial Statements and copy of Income Tax returns filing of last 3 years.
5. The bidder should be an Income Tax Assessee having filed I.T. Returns for the last three Financial Years. (Income tax Pan Card copy should be attached).
6. The bidder should be a registered company in India as per the applicable statute and be in existence for at least five years. Company should have a valid Registration Certificate issued by Ministry of Corporate Affairs, GST Registration, PAN Number allotted by the respective authorities. Self-attested copy of company registration certificate, GST, PAN number. Copy of Memorandum of Association and Article of Association OR Limited Liability Partnership Agreement are required to be submitted.
7. The company should be ISO 9001 certified for quality standards and ISO 27001 certified for Information Security, Data Privacy, and GDPR Compliant. Copies of the certificates to be attached.
8. The bidder should provide single window for all end to end services such as implementation, configuration, maintenance and training to the end users and onsite technical support person at UBISL office. The development and support team of vendor shall be available offsite to support UBISL as and when required.
9. The company should have presence in Mumbai region for better coordination during the contract. Contact details and address of company's office in Mumbai region to be provided in the tender. Physical verification may be done by UBISL before awarding the contract.
10. The applicant should not have been black-listed or faced legal action by any Public Sector Bank, RBI or IBA or any other Government agency as on date of this RFP.
11. The applicant should not engage in any form of canvassing/lobbying/influence/query regarding short listing, status, etc as the same will be mount to disqualification.
12. The proposal of only those applicants who satisfy all the specified conditions will be considered for evaluation process. The criteria and the actual process of evaluation of the

responses to this RFP and subsequent selection of the successful bidder will be entirely at the Company's discretion.

13. Data Privacy and Security Compliance
 - I. Data Protection Laws: Ensure the HRMS complies with data protection regulations, such as GDPR (General Data Protection Regulation), or any relevant local data protection laws.
 - II. Access Control: The HRMS and Payroll vendor should support for access control, including role-based access, multi-factor authentication (MFA), and strong password policies to secure sensitive HR data.
 - III. Data Encryption: Require data encryption for both data at rest and data in transit to prevent unauthorized access.
 - IV. Data Masking and Anonymization: The HRMS and Payroll handles PII (Personally Identifiable Information), it should support data masking or anonymization to protect sensitive information.
14. Audit and Compliance Management
 - I. Logging and Monitoring: The system should provide comprehensive logging of user activity, including login times, changes made to data, and access to sensitive information.
 - II. Audit Trail: The HRMS and Payroll should have an audit trail feature that logs any changes to critical employee information, showing who made changes and when.
 - III. Compliance Reporting: The system should have built-in or customizable reporting to support compliance audits and internal reviews.
 - IV. SIEM Integration: The HRMS and Payroll vendor should integrate with a Security Information and Event Management (SIEM) tool for centralized monitoring and alerting for the application services and vulnerability checks.
15. Business Continuity and Disaster Recovery
 - I. Data Backup and Recovery: The HRMS and Payroll should support automated backups, with clear processes for recovery in case of data loss.
 - II. Disaster Recovery (DR) Plan: The HRMS and Payroll vendor should have a DR plan, including Recovery Time Objective (RTO) and Recovery Point Objective (RPO) standards for HRMS and Payroll.
 - III. High Availability (HA): The HRMS and Payroll application systems should support high availability to minimize downtime.
16. Access Management and User Rights
 - I. User Role Management: The HRMS and Payroll should support granular user role management to restrict access based on job function.
 - II. Segregation of Duties (SoD): Include provisions to ensure SoD to avoid conflicts of interest, especially in functions involving payroll or financial data.

- III. Periodic Access Reviews: The HRMS and Payroll vendor should facilitate periodic access reviews to ensure that only authorized users have access to sensitive data and provide the logs for the audit purpose.
17. Compliance with IT Security Standards
 - I. ISO/IEC 27001: The system and the vendor should ideally be certified in ISO/IEC 27001, demonstrating a robust Information Security Management System (ISMS).
 - II. SOC 2 Compliance: Ensure that the HRMS and Payroll provider adheres to SOC 2 standards, particularly the security, confidentiality, and privacy principles.
 - III. OWASP Compliance: The HRMS should be developed following Open Web Application Security Project (OWASP) standards to avoid common vulnerabilities like SQL injection, XSS (cross-site scripting), etc.
 - IV. Network Security: The HRMS and Payroll vendor should support for secure API connections and secure network architecture to protect data during integration with other systems with no cost.
18. Vendor Management and Third-Party Compliance
 - I. Service Level Agreements (SLAs): The HRMS and Payroll vendor should have SLAs with key performance indicators (KPIs) for availability, support, incident response time, and resolution.
 - II. Third-Party Risk Management: Ensure the vendor has mechanisms to evaluate and manage the risks associated with their own third-party providers.
 - III. Background Checks and Employee Screening: Require that the vendor's employees with access to HRMS and Payroll data have undergone background checks and screening, if relevant to data security.
19. Compliance with HR-Specific Standards
 - I. Employee Data Lifecycle Management: The HRMS and Payroll vendor supports handling employee data throughout its lifecycle, including onboarding, updates, and offboarding.
 - II. Data Retention and Deletion: Ensure that the HRMS includes configurable data retention and deletion policies, aligned with applicable data retention laws. Data retention period should be for 10 years.
20. Incident Response and Management
 - I. Incident Response Plan: The HRMS and Payroll vendor should have a documented and tested incident response plan, including notification protocols for security breaches involving HR data.
 - II. Breach Notification: Include breach notification requirements in compliance with applicable laws, ensuring timely notification if HR data is compromised.
 - III. Forensics and Investigation Support: Ensure the system has logging capabilities that support forensic investigations if a security incident occurs vendor should be able to produce all the required logs with the UBISL.
21. Periodic Compliance Assessments

- I. Regular Security Audits: The HRMS and Payroll vendor must conduct regular security audits, including vulnerability assessments and penetration tests (VAPT), to ensure system security and share the report with UBISL.
- II. Compliance Updates: Require that the vendor regularly updates the HRMS and Payroll to stay compliant with evolving IT standards and regulations.
- III. Compliance Certification: The HRMS and Payroll vendor must maintain to demonstrate ongoing compliance, e.g., annual security certification reviews. Or any new required certifications for the system.

SECTION III

SCOPE OF WORK

Modules under Human Resource Management System and Payroll Managed Services for UBISL

1. UBISL wishes to introduce the best-practiced processes and techniques in HR in managing its workforce. For improving its HR management and Payroll systems, the UBISL wishes to use a Web enabled centralized solution with security features. The new technology and practices in the areas of Human Resources Process Management System should enable the UBISL to achieve the objectives of operational efficiency, streamlined process and work flow automation in respect of HR functions.
2. UBISL proposes to award the contract to a selected vendor with necessary resources and expertise for delivering the software and agreed services as broadly outlined below.
3. Bring in the best of systems/processes in HR management to enhance efficiency of the UBISL's existing HR systems / practices /procedures.
4. Assist UBISL in providing self-service facilities to the employees like browsing Salary records, Printing of Pay Slips. Offer a comprehensive and self-contained HRMS & Payroll solution conforming to the best standards with sophisticated tools and processes for HR management.
5. The HRMS Data ownership will lie with UBISL, the monthly data backup to be restored at UBISL HO.
6. The solution should provide a facility for processing Payroll, reimbursements, etc. at UBISL PAN India Offices.
7. The solution should have all reports generation facility for MIS as well as statutory requirements and reporting (statutory and other) purposes.
8. Enable Migration of data from existing systems with proper validation, controls and consistency checks as may be specified by the UBISL.
9. Provide end User IT support, impart the required training to the UBISL's staff for operating the HR applications brought in /implemented by him.
10. The HRMS/Payroll system should be integrated with existing application for data movement, loss of pay, Leave Calculation without any additional cost.
11. The duration of proposed HRMS/Payroll project implementation should not be more than 2 months and 2 months of parallel salary processing.
12. Employee Information Management: -
 - Each employee is provided with the login credentials.
 - Employee Categories/Classification: Department | Designation | Vertical | Permanent / Deputation / Contractual etc.
 - Employee can view their Service details i.e. Histories like Training | Transfer | Increment | Promotion.
 - Employees can maintain & view their Personnel & Official details like PF | Gratuity | Family | Depend | Nominees | Qualification | Skill | Hobbies | Passport | Visa |.
 - Employee can view all salary & Income Tax details like Pay slip | Annual Salary | IT Projection | Yearly Payment.
 - Submit Investment Declaration and Investment proofs for Income Tax deduction.
 - Confirmation due report as per policy.

13. Attendance & Leave Management:

- Daily attendance recording in the system.
- Leave types such as sick leave, casual leave and earned leave.
- Create leave profile —leave types, no. of leaves and rule for each leave type as per the policy
- Assign leave profile — Leave profile can be assigned to an employee or to group of employees
- Online leave request submission
- Online leave approval process
- Visibility of monthly calendars
- View leave statistics and report
- Leave requests report for upcoming or past period
- Weekly holidays (Saturdays & Sundays) Festival Holidays/ Restricted Holidays

14. Payroll Managed Services

a. Salary Processing for Head Office & Regional Offices

- I. Processing of the regular salary and allowances.
- II. Processing of supplementary bill payments such as leave encashment, arrears, incentives, bonus, etc.
- III. Processing of various advances to employees & its recovery on monthly basis and preparation of Broad sheet.
- IV. Deductions from the salary like PF, ESIC, NPS, TDS, Professional taxes (as applicable).
- V. Various deductions from the salary of employees.
- VI. Preparation of General voucher.
- VII. Linking of General voucher with Integrated Financial Management System.

b. Budgeting for salary bill for the Corporation

- I. Preparation of Budget & Revised Budget towards salary & allowances for the financial year.

c. Income Tax

- I. Income tax calculation and generation of following forms.

- Form 12 BA
- Form 24
- Form 16, etc.

- II. Calculation of prerequisites and rebate on HRA for computation of Income Tax liability of Employees.

- III. Annual & quarterly TDS return of the Corporation towards salary iv. Provision to all the employees of the Corporation to furnish the particulars for the assessment of Income Tax for a financial year.

d. Reports

Based on all the above input data & processing, provision for various reports in "HRMS including Pay bill system" has to be provided by the Firm/ Company.

15. HR/Labour Compliance

a. The Shops And Commercial Establishment Act.

- I. Updation of all statutory registers
- II. Preparation and Filing of all statutory returns as per statutory periodicity
- III. Facilitate Display of statutory abstracts and notices
- IV. Continuous liaison and Inspection handling limited to submission of reply and desired documents.

b. The Contract Labour (Regulation & Abolition) Act – 1970

- I. Generation of statutory registers for Principal Employer
 - II. Preparation and Filing of all statutory returns as per statutory periodicity for Principal Employer Facilitate Display of statutory abstracts and notices.
 - III. Continuous liaison and Inspection handling limited to submission of reply and desired documents with respect to Principal Employer
- c. The Minimum Wages Act – 1948
- I. Intimation of Change in MW components by the respective States.
 - II. Generation of all statutory registers
 - III. Preparation and filing of all statutory returns as per statutory periodicity
 - IV. Facilitate Display of statutory abstracts and notices
 - V. Continuous liaison and Inspection handling limited to submission of reply and desired documents
 - VI. Check minimum wages compliance for new Joinees every month and for all employees, twice a year / as minimum wages is revised
 - VII. If the client has not mapped skill levels - We can help the client to do that as a one-time exercise (Commercials may be applied based on the mandate)
- d. The Payment Of Wages Act – 1936
- I. Generation of all statutory registers
 - II. Preparation and filing of all statutory returns as per statutory periodicity
 - III. Facilitate Display of statutory abstracts and notices
 - IV. Continuous liaison and Inspection handling limited to submission of reply and desired documents
- e. The Equal Remuneration Act – 1976
- I. Generation of all statutory registers
 - II. Continuous liaison and Inspection handling limited to submission of reply and desired documents
- f. National Festival & Holidays Act 1963
- I. Inti
 - II. mate the client on the Holiday list published by the respective Central / State Government.
 - III. Prepare and submit the Holiday list with the concerned authority.
 - IV. Facilitate Display of acknowledged Holiday list at the client notice board.
 - V. Continuous liaison and Inspection handling limited to submission of reply and desired document
- g. The Maternity Benefit Act – 1961
- I. Generation of all statutory registers
 - II. Preparation and filing of all statutory returns as per statutory periodicity
 - III. Facilitate Display of statutory abstracts and notices
 - IV. Continuous liaison and Inspection handling limited to submission of reply and desired document
- h. The Payment Of Bonus Act - 1965
- I. Generation of statutory register Form-C
 - II. Preparation & Filing of annual return
 - III. Continuous liaison and Inspection handling limited to submission of reply and desired documents
- i. The Payment Of Gratuity Act – 1972
- I. Generation of all statutory registers

- II. Preparation and filing of all statutory returns as per statutory periodicity
- III. Display of statutory abstracts and notices
- IV. Continuous liaison and Inspection handling
- j. The Employment Exchanges (Compulsory Notification Of Vacancies) Act, 1959
 - I. Generation of all statutory registers
 - II. Preparation and filing of all Half Yearly and Bi-annual returns.
 - III. Continuous liaison and Inspection handling
- k. The Sexual Harassment Of Women At Workplace (Prevention, Prohibition And Redressal) Act, 2013
 - I. Facilitate display of Policy and abstracts
 - II. To submit the annual report to the appropriate authority (if designated by the state) otherwise, the report shall be submitted into Labour Authority
- l. The Employees Compensation Act
 - I. Preparation and filing of all statutory returns as per statutory periodicity
 - II. Continuous liaison and Inspection handling limited to submission of reply and desired documents
- m. Apprentice Act – 1961
 - I. Preparation and filing of all statutory returns as per statutory periodicity
- n. Industrial Disputes Act, 1947
 - Any returns under this act will be taken care by TL post getting the date from the client and any labour disputes resolution, query attending, labour matters are not part of this scope, this should be handled by the client himself on their own arrangements.
- o. Child Labour (Prohibition & Regulation) Act, 1986
 - Declaration under that act would be filed with the department as and when necessary across based on the input from client.

16. Payroll Compliance

- a. The Employees Provident Fund And Miscellaneous Provisions Act – 1952
 - I. Preparation of monthly ECR
 - II. Provide the output details to the client for remittance of the contribution.
 - III. Prepare and submit the Monthly MIS on the Challans.
 - IV. Provide the acknowledgement to the client.
 - V. Assist in the PF Inspection at client place along with the client in respect to HR-related data such as challans/returns etc. however, the financial data submission shall be the sole responsibility of the client
 - VI. Preparation of reply and demand challans
 - VII. Virtual help desk for AYM Core Employees to clear doubts related to PF & ESIC
- b. The Labor Welfare Fund Act
 - I. Generate the ESI Challans and intimate the client for the remittance of the contribution.
 - II. Preparation of all statutory returns as per statutory periodicity
 - III. Prepare and submit the Monthly MIS on the Challans
 - IV. Assist in the ESIC Inspection at client place along with the client in respect to HR-related data such as challans/returns etc. however, the financial data submission shall be the sole responsibility of the client
 - V. Preparation of reply /demand challans
- c. Employee Professional Tax

- I. Preparation and filing of all statutory returns as per statutory periodicity however the payment Chq wherever required shall be provided by the client (if online payment is not facilitated by the government)
 - II. Preparation and filing of statutory contributions challans
17. Reimbursements
- I. Entitlements as per policy
 - II. Other reimbursements
18. Annual Performance Management
- I. Promotions, Competency Assessment and Appraisal process
 - II. Work-flow from employee to appraiser
 - III. Rewards & Punishments/Disciplinary Action/ Promotions/ Trainings
19. General Features of HRMS
- a. Tools/ Utilities
 - I. Employee life cycle dashboard — Bird's eye view for management
 - II. General administration — Creating/ deleting/ modifying users profiles and parameters.
 - III. Self-managed parameters - Admin user can manage heads being used in modules, nullifying dependence on software developer. Also, the proposed system should be parameterized at Admin level i.e., any change in rates/values can be handled by Admin level itself and not at the code level.
 - IV. Internal messaging
 - V. Events and notifications
 - VI. Announcements
 - VII. Provision for uploading Circulars/ Officer Orders etc.
 - b. MIS Reports
 - I. Provision to download the reports in required format viz. Pdf, excel, delimited, csv, plain text etc.
 - II. Standard MIS reports and new reports as per user requirements.
 - III. Few important reports such as
 - Reports of Sanctioned Strength of UBISL (Post wise along with details of Officers / Employees in-position, Vacancy & details of occurrence of vacancy)
 - Reports pertaining to posting details of Officers / Employees (Vertical/Region wise)
 - Reports pertaining to Seniority List of the Officers / Employees of UBISL (Grade wise)
 - IV. Role based Application security implementation
 - User Categories
 - User Creation
 - Menu Mapping with users
 - Password generation
 - V. Add-ons
 - Manpower Training
 - E-mail/SMS integration and alerts
 - Integration with Finance modules.
18. Additional Human Resource Management System Modules
- I. Time and Attendance Tracking
 - II. Recruitment Module
 - III. Learning and Development
 - IV. Mobile Access

SECTION IV

EVALUATION PROCESS

1. TECHNICAL BID EVALUATION

- I. The Company's Bid Evaluation process consists of two-stage procedure. In the first stage, the eligibility bids shall be evaluated by a duly constituted Procurement Committee.
- II. The first process for the Procurement Committee is to examine the eligible bids as per the tender specifications. Bids, not satisfying the eligibility criteria shall be rejected and no further evaluation of bids of these Bids will be done.
- III. For Evaluation, if required the Procurement Committee may ask for additional information from the bidders. The time limit to submit additional information shall be specified. Bids of the agencies failing to adhere to the specified time limit shall be rejected.
- IV. No conditional bids will be accepted by the Company.
- V. UBISL reserves the right to accept or reject any tender offer, and to cancel the tendering process and reject all tenders at any time prior to award of contract, without thereby incurring any liability towards the affected Bidders(s) or any obligation to inform the affected Bidder(s) of the grounds for such action.

2. FINANCIAL BID EVALUATION

- I. Financial Bids of only the Bidders qualified in the Technical evaluation shall be opened.
- II. Procurement Committee would scrutinize the Financial bids.
- III. The bids found lacking in strict compliance to the commercial bid may get rejected.
- IV. It should be noted that the lowest price will not be the sole criteria for awarding Bid.
- V. TDS will be deducted as per prevailing income Tax Laws and certificate to this effect shall be provided to the bidder by UBISL. The responsibility of paying the GST as per prevailing rate as claimed in the bill amount, will be of the bidder.
- VI. **The MD & CEO of the Company reserves the right to withdraw/relax any of the terms and conditions mentioned above.**

SECTION V

1. TERMS & CONDITIONS

- I. The Bidders willing to submit responses to this RFP should abide by all the terms and conditions mentioned in the RFP. If the responses contain any extraneous conditions put in by the respondents, such responses will be disqualified and will not be considered for the selection process.
- II. All responses should be in English language.
- III. Bids must be submitted in two parts a) Technical Bid and b) Financial Bid.
- IV. Bids received after the due date/time as mentioned on 'Page 1' for submission would be rejected. The Bids will be valid for a period of 180 days after opening of the bids.
- V. The rates quote shall remain unchanged during the entire contract period.
- VI. Terms of payment will be as set out in the Empanelment Agreement to be entered into by the Company with the empanelled bidders and will be binding on the bidders.
- VII. The Bidders will not be required to submit any Bid Security or EMD or PBG.
- VIII. Responses to this RFP by the Bidders shall not constitute an obligation on the part of the UBISL to award.
- IX. The Bids once submitted cannot be withdrawn/modified after the last date for submission.
- X. The Bid documents once submitted will not be returned in any event.
- XI. UBISL shall treat offers not adhering to terms and conditions stipulated in Bid document as incomplete and shall be liable to be rejected.
- XII. No request will be considered for price revision during the contract period.
- XIII. The bids will be opened in the presence of the duly formed Procurement Committee of UBISL.
- XIV. The sealed cover **Envelope-I** containing Technical Bid will be opened in the first instance in the presence of Procurement Committee.
- XV. **Envelope-II** containing Financial Bids of qualified technical bids only shall be opened on the pre-decided date which shall be intimated to the bidders who have been found successful in Evaluation of Technical bids.

2. OTHER TERMS OF RFP

I. CONFIDENTIALITY PROVISION

The terms of this RFP, the information provided by UBI Services Ltd (UBISL) herein and all other information provided by Bidder in connection with the services to be provided by the Bidder pursuant to this RFP, are to be treated by Bidder as strictly confidential and UBISL's proprietary. Such information/ materials are provided to the Bidders for exclusive use in evaluating for the purpose of responding to this request. Access shall not be granted to third parties except upon prior consent of UBI Services Ltd (UBISL) and upon the written agreement of the intended recipient to treat the same as confidential. UBI Services Ltd (UBISL) may request at any time that any of Company's material be returned or destroyed. If at any time Bidder chooses not to respond to this RFP, please return all materials, information/ destroy any copies of the document and any duplicates thereof and confirm the non-participation either in writing or by email.

II. ACCEPTANCE OF PROPOSALS

UBI Services Ltd (UBISL) reserves the right to modify the terms and conditions of the RFP at any time at its sole discretion. Subsequent to the submission of proposals, interviews and negotiations may be conducted with one or more Bidders, but there will be no obligation to receive further information, whether written or oral, from any Bidder or to disclose the nature of any proposal received. This RFP should not be construed as an agreement to purchase products or services or representation that a contract shall be offered. UBI Services Ltd (UBISL) is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in accordance with the evaluation criteria of UBISL. Neither the lowest price nor the highest scoring proposal will necessarily be selected. UBISL reserves full discretion to determine the competence and responsibility, professionally and/or financially, of Bidder. UBISL may award a Contract for a particular service to two or more Bidder if UBISL makes a determination that such an award is in the best interest of UBISL.

III. LIABILITY FOR ERRORS

While UBI Services Ltd (UBISL) has made considerable efforts to ensure an accurate representation of information in this RFP as per its current understanding of the requirements under the various activities in the scope of work, the information contained in this RFP is as a guideline for Bidders. The information is not guaranteed or warranted to be accurate by UBI Services Ltd (UBISL), nor is it necessarily comprehensive or exhaustive. UBISL has prepared this RFP in good faith and to the extent UBISL is permitted by law, UBISL excludes any liability, whether in contract, negligence or otherwise for any incorrect or misleading information contained in this RFP.

Nothing in this RFP is intended to relieve Bidders from forming their own opinion and conclusions with respect to the matters addressed in this RFP. In the event UBI Services Ltd (UBISL) finds that the objectives of the intended activities is better achieved by processes/procedures other than those mentioned in this document, UBI Services Ltd (UBISL) shall have the right irrespective of the fact whether it has already received proposals from intending bidders or not, to effect such changes and enter into negotiations with one or more Bidders at its sole discretion for such changed/modified processes.

IV. APPLICABLE LAW & JURISDICTION OF COURT

This RFP shall be governed by, and construed in accordance with the Laws of India. Any disputes arising out of or under this RFP shall be subject to the jurisdiction of the courts in Mumbai only.

V. INDEMNIFICATION

The Successful Bidder /Vendor is solely liable to fully indemnify and keep UBISL indemnified against all losses/ penalties/ award/ decree arising out of litigation/ Claim/ application initiated against UBISL on account of acts of omission / commission attributed to the successful Bidder/ Vendor and which are punishable under the provisions of various Central & State Labour Laws.

VI. INSPECTION AND AUDIT

The Bidder/ vendor shall allow UBI Services Ltd (UBISL), its management, auditors, regulators and/or agents the opportunity for inspecting, examining, auditing and/or taking copies of the vendors operations and business recourse which are relevant to the RFP and/ or for carrying out the activities as /or financial arrangements/ agreements set forth in the Agreement. UBI Services Ltd (UBISL) shall have the right to do a Security Audit of the Bidder/ vendor's IT infrastructure. The Bidder/ vendor shall make necessary changes / upgrades to the IT systems as may be necessary or as required by UBI Services Ltd (UBISL) from time to time to ensure data safety.

VII. CONTINUITY OF BUSINESS

In case UBI Services Ltd (UBISL) requires a Bidder/ vendor to present a plan that specifically addresses through what type of resources and how long will be available to ensure continued service in achieving given responsibility, Vendor/s shall provide details/Projections as Additional information in their offer.

VIII. NOTICES AND OTHER COMMUNICATION

If a notice has to be sent to either of the parties following the signing of the contract, it has to be in writing and shall be sent personally or by certified or registered post with acknowledgement due or reputed courier or email duly transmitted, addressed to the other party at the addresses, email given in the contract.

Notices shall be deemed given upon receipt, except that notices sent by registered post in a correctly addressed envelope shall be deemed to be delivered within 5 working days (excluding Sundays and public holidays) after the date of mailing dispatch and in case the communication is made by email, on business date immediately after the date of successful email transmission (that is, the sender has a hard copy full to the correct email address).

Any Party may change the address, email address and fax number to which notices are to be sent to it, by providing written notice to the other Party in one of the manners provided in this section.

IX. TERMINATION

UBI Services Ltd (UBISL) may terminate the RFP process at any time or stage and without assigning any prior notice or reason. UBISL makes no commitments, express or implied, that this process will result in a business transaction with anyone. This RFP does not constitute an offer by UBISL. The Bidder's participation in this process may result in UBISL selecting the Bidder to engage in discussion and negotiation toward execution of a contract. The commencement of such negotiation does not, however, signify a commitment by UBISL to execute a contract or to continue negotiation. UBISL may terminate at any time without assigning any reason.

The termination hereof shall not affect any accrued right or liability of either Party nor affect the operation of the provisions of the Work Order/ Empanelment Agreement that are expressly or by implication intended to come into or continue in force on or after such termination.

UBISL may terminate the Empanelment Agreement in full or in parts by giving a written notice of 30 days or such other time period as may be set out in the Empanelment Agreement to the other party against acknowledgement. Similarly, UBISL may terminate the Work Order in full or in parts by giving a written notice of 7 days to the other party against acknowledgement.

**RFP Response Covering Letter
(On Bidders Letterhead)**

Date:

To,
RFP Co-ordinator,
UBI Services Limited
504-506, Centrum,
S.G. Barve Road,
Wagle Estate (MIDC)
Thanve-400607

**SUB: Empanelment of Vendor for Human Resources Management System (HRMS),
HR/Labour Compliance & Payroll Managed Services**

Ref: Your RFP: UBISL/RFP/24-25/HR/001

(The Bidder to read the terms and conditions as provided in the RFP document and accordingly fill in the details for specific bid evaluation criteria. Bidders not meeting the requirements or not demonstrating that they do not meet the eligibility criteria may not receive further consideration during the evaluation process.)

Confirmation of Eligibility Criteria**A. Bidder's Profile:**

Sr. No.	Particulars	Response from the bidder
1	Name of the bidder	
2	Year of establishment and constitution Certified copy of "Partnership Deed" or "Certificate of Incorporation" should be submitted as the case may be.	
3	Registered /Corporate office and address	
4	Mailing address of the bidder	
5	Names and designations of the authorized persons.	

Sr. No.	Particulars	Response from the bidder
6	Telephone/Mobile Nos. of contact persons	
7	E-mail addresses of contact persons	
8	Background of business and service Profile	
9	Gross revenue of the bidder (Document to be enclosed) Year 2021-22 Year 2022-23 Year 2023-24	
10	Net Profit (after all taxes etc) of the bidder (Document to be enclosed) Year 2021-22 Year 2022-23 Year 2023-24 Documentary proofs- Audited to be enclosed	
11	Net Worth of the bidder (Document to be enclosed) Year 2021-22 Year 2022-23 Year 2023-24	
12	GST no. of the company: (photocopy to be enclosed)	
13	PAN No: (photocopy to be enclosed)	
14	Whether the company has the following certificates: a. ISO 9001 (Yes/No) b. ISO 27001 (Yes/No) If Yes, furnish the copy of relevant certificates.	
15	Contact Details and Address of company's Office in Mumbai	
16	Any other relevant information.	

B. Document to be attached

S. No	Particulars	Eligibility Criteria	Documents to be submitted (Duly attested)	Bidder's response
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1	Type of Company	The bidder must be an Indian company/firm; a Private Limited Company, Limited Company, registered under Companies Act Or an LLP. (Consortium of companies not permitted)	Certificates of Registration, as required	
2	Period of Business	The Bidder should have been in existence for a minimum period of 5 years in India in same business.	Copy of work orders and or certificate of completion of work	
4	Type of Clients handled	Bidder should have provided HRMS solutions, HR/Labour Compliances Payroll Managed Services across India in BFSI Sector	PO copies / Engagement Letter / Contract copy	
5	No. of Office	Number of Offices PAN India with address	Self-Declaration	
6	Blacklisting/ Litigation	The bidder company should not currently have been blacklisted by any Government Department/PSU/ or under any declaration of ineligibility for fraudulent/corrupt practices of inefficient/ineffective performance	Self-declaration on the bidder's letter head	
7	Taxation Registration	The bidder must have a valid: PAN: GST Registration No.:	Attested copies of all certificates & KYC of Company	
8	Ownership	The bidder should not be owned or controlled by any of the Directors or present employees (or relatives) of UBISL	Self-declaration on the bidder's letter head	
9	Turnover	Copies of Annual Reports in case of companies and copies of audited balance sheets and P&L statements in case of others.		

Based on the information provided, the company will shortlist vendors/ companies which prima facie come up to its requirement. Preference will be assigned to bidders who do not further outsource/ sub-

contract. The criteria detailed above are indicative and the company reserves the right to revise them at its discretion.

Documentary evidence must be furnished against each of the above criteria along with an index. All documents must be signed by the authorized signatory of the bidder. Relevant portions, in the documents submitted in pursuance of eligibility criteria, should be highlighted.

Note:

1. All self-certificates shall be signed by Authorized
2. In case the same document is provided for more than one criterial, separate document should be provide for each clause.

Dated this _____ day of _____, 20

Signature: _____

(Signature and seal of company on all the pages of Annexure)

Annexure-II**List of incomplete /dropped contracts
(On Bidders Letterhead)**

Details of the contracts which was legally contracted but were dropped without completion in last five financial years.

1	Name of the client	
2	Brief Description of the contract	
3	Duration/tenor of the contract as per the agreement:	
4	Start date:	
5	End date/Date on which the project/program was dropped:	
6	Contact details of the client	
7	Reasons for non-completion/dropping	
8	Any other relevant information	

Name:

Designation:

Date:

Sign & stamp

Undertaking**(On the letter head of the Bidder duly signed by an authorized signatory)**

To,
RFP Co-ordinator
UBI Services Ltd.
504-506, Centrum IT Park,
S.G. Barve Road, Wagle Estate (MIDC)
Thane (West), 400604.

Madam /Sir,

Sub: RFP for Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed Services

Having examined the RFPs including all Annexures and Appendices, the receipt of which is hereby duly acknowledged, we, the undersigned offer to undertake Empanelment of Agencies for supply Off-Roll manpower and Recruitment of On-Roll Staff in full conformity with the said tender document and in accordance with our proposal.

1. If our Bid is accepted, we undertake to comply with the delivery schedule as mentioned in the RFP.
2. We confirm that this offer is valid and open for evaluation according to their terms and conditions for a period of 90 days from the last date for submission of tender document to the UBISL.
3. This Bid, together with your written acceptance thereof and your notification of award, shall constitute a binding Contract between us.
4. We have never been barred/black-listed by any regulatory /statutory authority in India or abroad.
5. We undertake that in competing for and if the award is made to us, in executing the subject contract, we shall strictly observe the laws against fraud and corruption in force in India namely "Prevention of Corruption Act, 1988".
6. We certify that we have provided all the information requested by the UBISL in the format requested for. We also understand that the UBISL has the exclusive right to reject this offer in case the UBISL is of the opinion that the required information is not provided or is provided in a different format.
7. We hereby covenant, warrant and confirm that the soft-copies of the proposal submitted by us in response to the RFP and the related addendums/ corrigendum and other documents including the changes made to the original RFP issued by the UBISL, conform to and are identical with the hard-copies of aforesaid proposal submitted by us, in all respects.

Dated this.....by 2024

Yours sincerely,

Signature of the Authorized Signatory Name:

Designation:

Annexure-IV**Credentials Details****(On the letter head of the Bidder duly signed by an authorized signatory)**

The expertise of the organization in Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed Services should be exhibited in detail. The Credentials should be arranged as below:

Sl. No.	Name of Organization along with the industry	Scope of the Assignment	Duration of the Assignment	Project Team
1				
2				
3				
4				
5				

All Credentials should be backed by references, which must include the following details:

- Contact Person's Name
- Name of Organization and Designation
- E-mail Address
- Mobile Number

The Company reserves the right to approach the references for further background checks.

Yours sincerely,

Signature of the Authorized Signatory Name:

Designation:

(Sample Format – To be executed on a non-judicial stamp paper of requisite value in event of selection of Agency – NOT TO BE SUBMITTED NOW)

Annexure-V

Non-Disclosure Agreement

WHEREAS, We, _____, having Registered Office at _____, hereinafter referred to as the COMPANY, are agreeable to execute“...<service name> ” as per scope defined in the Request For Proposal (RFP)No.....dated...../...../2024 for UBI Services Ltd, having its office at 504-506, Centrum, S.G. Barve Road, Wagle Estate MIDC, Thane-400604 (hereinafter referred to as UBISL) and;

WHEREAS, the COMPANY understands that the information shared by UBISL in their Request for Proposal is confidential and/or proprietary to UBISL, and;

WHEREAS, the COMPANY understands that in the course of submission of the offer for these a id RFP and/or in the aftermath thereof, it may be necessary that the COMPANY may perform certain jobs/duties on the UBISL’s properties and/or have access to certain plans, documents, approvals, data or information of the UBISL;

NOW THEREFORE, in consideration of the foregoing, the COMPANY agrees to all of the following conditions, in order to induce the UBISL to grant the COMPANY specific access to the UBISL’s property/information, etc.;

The COMPANY will not publish or disclose to others, nor, use in any services that the COMPANY performs for others, any confidential or proprietary information belonging to the TRUS, unless the COMPANY has first obtained UBISL’s written authorization to do so;

The COMPANY agrees that information and other data shared by UBISL or, prepared or produced by the COMPANY for the purpose of submitting the offer to UBISL in response to the said RFP, will not be disclosed to during or subsequent to submission of the offer to UBISL, to any one outside the UBISL;

The COMPANY shall not, without UBISL’s written consent, disclose the contents of this Request For Proposal (Bid) or any provision thereof, or any specification, plan, pattern, sample or information (to be) furnished by or on behalf of the UBISL in connection therewith, to any person(s) other than those employed/engaged by the COMPANY for the purpose of submitting the offer to the UBISL and/or for the performance of the Contract in the aftermath.

Disclosure to any employed/engaged person(s) shall be made in confidence and shall extend only so far as necessary for the purposes of such performance.

Yours sincerely,

Date
Place

Signature of Authorised Signatory
Name of the Authorised Signatory Designation
Name of the Organization
Seal

IN WITNESS WHEREOF THE PARTIES HERETO HAVE CAUSED THIS AGREEMENT TO BE EXECUTED BY THEIR AUTHORIZED REPRESENTATIVES ON THIS _____ DAY OF _____, 2024.

Signed and delivered by

M/s

Signed by:

Name

Title.....

Signed and delivered by

UBI Services Ltd

Signed by:

Name

Title.....

In the presence of

.....

In the presence of

.....

Declaration for Clean Track Record
(On the letter head of the Bidder duly signed by an authorized signatory)

To,
RFP Co-ordinator
UBI Services Ltd.
504-506, Centrum IT Park,
S.G. Barve Road,
Wagle Estate (MIDC)
Thane (West), 400604.

Dear Sir,

RFP – Human Resources Management System (HRMS), HR/Labour Compliance & Payroll Managed
Services
(RFP No.....dated...../...../2024)

I have carefully gone through the Terms & Conditions contained in the RFP No.....dated ,2024 regarding selection of the vendor for providing captioned services as stated in RFP to UBISL. We undertake that our company has not been debarred/ blacklisted by any Public Sector Bank, RBI, IBA or any other Government / Semi Government organizations in India, as on date of this RFP. We also undertake that we are not involved in any legal case that may affect the solvency/ existence of our firm or in any other way that may affect our capability to provide/ continue to provide the services.

I further certify that I am the competent officer in my company to make this declaration that our bid is binding on us and persons claiming through us and that you are not bound to accept a bid you receive.

Thanking you,
Yours sincerely,

Date

Signature of Authorised Signatory

Place

Name of the Authorised Signatory

Designation

Name of the Organisation

Seal

Annexure-VII

Technical Bid
(Shall be printed on the letterhead of the bidder)

Technical Qualification Criteria

Bidders who meet the minimum eligibility criteria as per Section II and Annexure I would be considered as qualified to move to the next stage of Technical and Financial evaluations.

Technical Evaluation Criteria

Bidder must qualify the following eligibility criteria and should submit required documentary proofs as indicated below. Bids which fail to qualify any of the following criteria will be rejected.

To evaluate the Technical Bid, the Tender committee constituted by the Company shall examine the documents furnished by the Bidder in the Technical Bid and Presentation to be given by bidder. Only those Bids which satisfy the Eligibility Criteria will be invited to make a presentation. The date, time and venue will be intimated.

S. No.	Bidder Credentials	Max. Marks	Marks Awarded	Supporting Documentation	Reference Page No
1.	Experience in BFSI Sector for handling of HRMS similar projects. Preference will be given to the bidders who have experience of maintaining Human Resource Management system, HR / Labour Compliance and Payroll Managed Services. >= 5 projects (25 Marks) >=1 and <5 Projects (15 Marks)	25		Work Order and/ or Work completion certificate	
2.	Bidder's experience in successfully implementing and providing support to Human Resource Management system, HR / Labour Compliance and Payroll Managed Services in BFSI Sector during last five financial years of value more than Rs. 25 lakhs during the period 01st Apr 2019 to 31st Mar 2024. 5 Projects or more (20 marks) >=1 and <5 Projects (15 marks)	20		Work Order and/ or Wo completion certificate	

3.	<p>The bidder should employ sufficient number of skilled / technical personnel as per the prescribed parameters and the technology proposed.</p> <p>>=100 Professionals (15 Marks) >=50 and <100 Professionals (10 Marks)</p>	15		<p>The bidder must also enclose an undertaking stating that all the manpower deployed for execution of the contract would be employees of the bidder's company and under its own payroll.</p>
4.	<p>Financial Parameter:</p> <p>i. Annual financial turnover during the previous three financial years. >=1000 lakhs (10 Marks) >=500 lakhs and < 1000 lakhs (05 Marks)</p> <p>ii. Net worth during the previous three financial years. >=1000 lakhs (10 Marks) >=500 lakhs and < 1000 lakhs (05 Marks)</p>	10 10		<p>Copy of audited Financial Statements be enclosed</p>
6.	<p>Certification of the bidder: ISO 27001 certified for information security = (10 marks) ISO 9001 = (10 marks)</p>	20		<p>Valid copy of certificate to be enclosed.</p>
	Total	100		

Combined Evaluation Criteria:

1. Technical components will carry 70% weightage, and financial component will carry 30% weightage.
2. The technical bids submitted by the Bidders will be evaluated on a maximum of 100 marks.

3. The minimum qualifying marks required to be qualified in technical bid is 70% of the total score for technical component. Bidders who will get less than 70% in Technical evaluation will be rejected and their financial bids will not be opened.
4. Only those bidders, who qualify technically, would be considered for financial evaluation.

Financial Bid
(Shall be printed on the letterhead of the bidder)

The RFP Co-ordinator,
UBI Services Ltd.
504-506, Centrum IT Park,
S.G. Barve Road, Wagle Estate (MIDC)
Thane (West), 400604

Dear Sir,

We offer the rates for Human Resources Management System (HRMS), HR / Labour Compliance & Payroll Managed Services as under:

S. No.	Activity / Item Description	Amount (in Rs.)	Tax (in Rs.)	Total with Tax (in Rs.)
i.	Human Resources Management System (HRMS), HR / Labour Compliance & Payroll Managed Services with implementation and onsite technical support at UBISL, Head Office, Thane as per the scope of work: ➤ One time implementation cost ➤ Monthly recurring cost per employee per month			
ii.	Other Cost, if any with details			
	Grand Total (in Rs.)			

Note:

1. Certified that the above rates are exclusive of all taxes as may be applicable.
2. Certified that I agree to all the terms & conditions of the tender document

I/We agree to undertake the work subject to terms and conditions stipulated by UBISL at the rates quoted above.

Signature of the Authorized Signatory Name:

Designation:

Date:

Check list of Documents to be submitted

(After covering letter you can add this sheet)

Envelope	Documents to be submitted	Format as per	Attached in Bid Yes / NO
Envelope 1 TECHNICAL BID	RFP Response Covering Letter by Bidder	Annexure I	
	List of incomplete / dropped contracts if any	Annexure II	
	Undertaking	Annexure III	
	Credentials	Annexure IV	
	Non-Disclosure Agreement (given for information, To be submitted in event of selection)	Annexure V	NOT REQUIRED
	Declaration for Clean Track Record	Annexure VI	
	Technical Bid	Annexure-VII	
Envelope 2 FINANCIAL BID	Financial Bid	Annexure VIII	
OUTER BIG ENVELOPE containing Envelope 1 & 2 combined	In OUTER ENVELOPE TENDER FOR HUMAN RESOURCE MANAGEMENT SYSTEM, HR/LABOUR COMPLIANCE AND PAYROLL MANAGED SERVICES FOR UBISL		

IMPORTANT NOTE:

- Supporting documents must be attached wherever applicable.
- All pages of bid documents must be signed by authorized person
- All pages of bid documents should be numbered in serial order i.e.1,2,3 and soon.
- The technical bid should be properly banded and numbered to find out the documents with annexure in starting to explain positioning of documents in bid.

Signature of Authorized Person