



**NATIONAL UNION OF METALWORKERS OF SOUTH AFRICA
HEAD OFFICE**

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REQUEST FOR A PROPOSAL (RFP) PROVISION OF FUNERAL BENEFIT COVER ADMINISTRATION FOR NUMBER MEMBERS AND THEIR FAMILY

Introduction:

The National Union of Metalworkers of South Africa (NUMSA), head office in Newtown, Johannesburg, hereby invites qualified and reputable service providers to submit proposals for the administration of an existing funeral benefit scheme for NUMSA members and their extended families.

Proposals will be evaluated based on functionality requirements and thereafter on the 80/20 preference points system in accordance with NUMSA's Procurement Policy and applicable Preferential Procurement Regulations.

Background:

NUMSA recognises the importance of providing support to members and their families during bereavement. The union currently has an existing funeral benefit scheme in place and seeks to appoint a capable and experienced administrator to efficiently manage and administer this scheme.

The appointed administrator will be responsible for ensuring efficient operations, claims processing, compliance, and member support, while maintaining and improving service delivery standards.

Eligibility of members for Funeral cover in line with the membership:

All NUMSA members who pay membership fees through recognised membership systems qualify for funeral cover under the scheme. The benefit applies to members and their eligible dependents as defined in the policy.

Current Benefits in place for existing members and their extended family:

In the event of death of a member, his/her Spouse, his/her children and/or those stipulated on the cover of the member shall receive the following benefit:

- a) Shop Stewards – Single – 18 to 64 years - R 20 000
- b) Regional officer Bearers – Single – 18 to 64 years – R 50 000



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- c) Former and Current National office Bearers – Single – 18 to 64 years – R 100 000
 - d) Family – 18 to 65 years – R 2500

The above benefit is payable in the following events namely: Natural and Unnatural (including accidental) Death as well as Suicide which will be payable to a nominate beneficiary on the date of death.

Scope of services:

The successful bidder will be required to:

- Administer the existing funeral benefit scheme on behalf of NUMSA
- Manage member registration, data management, and policy records
- Process and pay claims efficiently within agreed turnaround times
- Provide a clear and accessible claims process for beneficiaries
- Ensure compliance with all regulatory and legislative requirements
- Provide regular reporting to NUMSA on scheme performance and claims
- Maintain accurate member and beneficiary records in line with FICA requirements
- Provide a clear communication strategy for NUMSA, members, and beneficiaries
- Offer member support services, including queries and dispute resolution
- Conduct awareness and education initiatives where required

Basis for tender and assumptions for proposal

- Policy Holder: The National Union of Metal Workers of South Africa (NUMSA)
- Participating Members:
 - Families of Approximately 291 025 members,
 - Shop stewards: Approximately 6000 members
 - Regional office bearers: Approximately 36 members
 - Former and current National office Bearers: Approximately 26 members
- Minimum entry age: 18 years
- Maximum entry age: 64 years



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- Cessation age: 65 years – it is to the discretion of NUMSA to extend the cover of an individual member beyond the stated cessation age up to 84 years provided the premium is received for such member from NUMSA on a monthly basis.
- Maximum number of spouses = 1 (one)
- Maximum number of dependents including the spouse = 6 (six)
- Maximum number of members including principle member in total = 7 (seven)
- Maximum age of Children including dependents without proof of being a full-time student – under 21 years
- Maximum age of Children including dependents with proof of being a full-time student – under 25 years
- Number of weeks of pregnancy after which a still born death will be included as a dependant – 26 weeks or more

Proposal Submission Requirements:

Interested service providers are requested to submit comprehensive proposals, which should include:

- Company profile and relevant experience in scheme administration or group risk benefits
- Detailed description of administrative systems and processes
- Claims management process and turnaround times
- Compliance with South African legislation and regulatory frameworks
- At least three client references
- Implementation and transition plan
- Value-added services (if any)
- Full disclosure of administration fees and cost structure

Evaluation Criteria

Proposals will be evaluated based on, but not limited to, the following criteria:

- Relevant experience and track record



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- Administrative capability and systems
- Efficiency and claims turnaround times
- Cost-effectiveness and value for money
- Compliance with legal and regulatory requirements
- References and reputation

Submission Details

All proposals must be submitted electronically in PDF format to zazin@numsa.org.za with the subject line: "RFP: NUMSA Funeral Scheme". Enquiries regarding this RFP may be directed to: zazin@numsa.org.za

Closing Date

The closing date for submission of proposals is close of business on 22nd April 2026 (UTC). Late submissions will not be considered.

Disclaimer

NUMSA reserves the right to withdraw or amend this RFP at any time, to reject any or all proposals, and to accept the proposal deemed most advantageous to the Council in its sole discretion, without assigning any reason or incurring any liability.

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DATE ISSUED: 1st April 2026