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Education, Training and Development Practices Sector Education and Training Authority

BID NO: SCMU: 04 - 2023/24

REQUEST FOR BIDS

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE PROFESSIONAL SERVICES TO INTEGRATE MICROSOFT DYNAMIC GREAT PLAINS WITH INFORMATION MANAGEMENT SYSTEM

1. INTRODUCTION

The Education Training and Development Practices Sector Education and Training Authority (ETDP SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act, No. 97 of 1998 to advance skills levels in accordance with the National Skills Development Plan (**NSDP**). The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce to benefit employers, workers, and employees in the ETDP sector.

The ETDP SETA will host a **COMPULSORY** virtual briefing session for **BID NO: SCMU: 04 - 2023/24 – Integration Microsoft dynamic Great Plains with Information Management System** on **21 July 2023 at 11h00**. Interested members should communicate their interest to join in the session, on or before **19 July 2023**. To attend and get access to the session, please email TienieJ@etdpseta.org.za with your Name, Surname, Company Name, Email address, and Cell phone Number. Access details will only be shared with those that confirmed. **Please do not forward the link further.** We thank you for your cooperation.

NB: THE MEETING ROOM FOR THE COMPULSORY BRIEFING SESSION WILL CLOSE AT 11H15

The ETDP SETA reserves the right not to award this Bid.

2. PURPOSE AND OBJECTIVES

The ETDP SETA is looking for a suitably qualified and accredited service provider to build integration between Microsoft Dynamics GP and Information Management System (**IMS**).

3. OVERVIEW

The ETDP SETA is in the process of developing and implementing an Information Management System (IMS). The system seeks to automate submissions of Annexure 2 Workplace Skills Plans and Reporting (WSPR), Education Training and Development Quality Assurance (ETDQA) processes, administration of skills development intervention and processing of mandatory grants that manages skills development. The system is cloud-based and runs on Odoo platform. It is required that the IMS system integrates with the ETDP SETA's financial management system (Microsoft Dynamics GP) for automated payment of Mandatory and Discretionary grants. Currently, the ETDP SETA finance system is hosted on-premises and is running on Microsoft Hyper-V as follows:

Host Server: *Microsoft Windows Server 2012 R2*
Database server: *SQL Server 2014*
Microsoft GP: *Version 2018*

Database and Microsoft Dynamics GP are installed on the same server

4. SCOPE AND REQUIREMENTS

4.1. Technical Requirements

The bidders are required to configure integration between the IMS system and Microsoft Dynamics GP as follows:

4.1.1. Mandatory grants and levies

- Processing of mandatory grants from IMS system to Microsoft Dynamics GP.
- Ensure that there is two-way communication between the two systems by providing feedback on transactions successfully or unsuccessfully posted.
- Processing of levy files from IMS system to Microsoft Dynamics GP through journals.

4.1.2. Discretionary grants.

- Linking purchase orders with projects created on the IMS system.
- Processing of discretionary grants payments from IMS system to Microsoft Dynamics GP.
- Ensure that there is two-way communication between the two systems by providing feedback on transactions successfully or unsuccessfully posted.

5. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2022. The evaluation will be guided by ETDP SETA procurement policy.

Folder A (USB) must have documents for Stage 1 and Stage 2

5.1. STAGE 1 [Folder A (USB)]

Bidders will be evaluated on the submission of the requested mandatory documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked.

5.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION

1. The company must provide valid Microsoft partner letter or certificate (with a clear indication of the validity period).
2. A valid Microsoft Dynamics GP certificate for the technical lead person.

NB: Failure to submit any of the above-requested mandatory documents will lead to disqualification.

5.2. STAGE 2 [Folder A (USB)]

In this stage, the evaluation of bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid document.

1. The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be eliminated.
2. Only bids that achieved the minimum qualifying score/ percentage for functionality will be evaluated further in accordance with the **80/20 preference point systems prescribed in Preferential Procurement Regulations 5 and 6.**

The evaluation criteria for functionality will be as follows:

NO	QUALIFYING CRITERIA FOR SHORT LISTING	POINTS
1.	<p>Experience & References: Company's proof of having successfully completed the deployment and configuration of Microsoft Dynamic GP in South Africa and contactable references.</p> <p>1.1. Experience and contactable references: (bidders must indicate projects where they have integrated Microsoft Dynamics GP with any other application and such proof must be contained on the referee's company letterhead with positive recommendation) (30)</p> <p style="margin-left: 40px;">I. 3 projects and above = 30</p> <p style="margin-left: 40px;">II. 2 projects = 20</p> <p style="margin-left: 40px;">III. 1 project = 10</p> <p>*[Each reference must clearly indicate;</p> <ul style="list-style-type: none"> • the name of the bidder and the project • objectives of the project (nature of the project) • recommendation and contact details of the referee as well as proof of completed project(s) and • must be signed. 	30
2.	<p>Project Deliverables: 40</p> <p>2.1 A solution proposal detailing the work to be implemented against these terms of reference. The proposal should respond to all items listed in section 4.1 of the terms of reference (30).</p> <p style="margin-left: 40px;">i. Mandatory Grants & Levies (15)</p> <p style="margin-left: 40px;">ii. Discretionary grants (15)</p> <p>2.2. Milestone-based project implementation plan indicating delivery period which should not exceed 3 months (10)</p>	40
3.	<p>3.1 Experience of Project Manager (Attach CV - the CV must clearly indicate the project management experience in systems implementation and respective clients) (10)</p> <p style="margin-left: 40px;">○ 4 years and above = 10</p> <p style="margin-left: 40px;">○ 2 - 3 years = 5</p> <p style="margin-left: 40px;">○ Below 2 years = 0</p> <p>3.2 Experience of Lead Technical Person (Attach CV - the CV must clearly indicate projects where they have implemented and integrated Microsoft Dynamic GP with any other system with contactable references. (20)</p> <p style="margin-left: 40px;">○ 3 projects and above = 20</p> <p style="margin-left: 40px;">○ 2 projects = 10</p> <p style="margin-left: 40px;">○ 1 project = 5</p> <p>NB: Failure to provide any of the above information (Contactable References) will lead to points not being allocated. (See attached Annexure for guidance)</p>	30

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	NB: The initial project team need not change during the course of the project without prior approval of the ETDP SETA	
TOTAL		100

Bidders must provide documents to justify awarding the above points, and such proof should include details of contactable references to validate the information submitted. **Points will be awarded on a sliding scale only where indicated.**

Please take note of the value and scoring point system of your bid.

5.3. STAGE 3 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. Submit a "Unique security personal identification number (PIN) issued by SARS" **which the SETA will use to verify the bidder's tax matters prior to the award**
- c. Invitation to Bid - **SBD1**
- d. Declaration of Interest – **SBD 4 (New)**
- e. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 - **SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals**
- f. B-BBEE certificate or sworn affidavit (**If claiming preferential points**) – **this will be used to verify points to be allocated for specific goals.**

80/20 preference point system shall be applicable as follows:

✓	Price	80
✓	Allocation of specific goals	20

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP SETA will adhere to its policy on the appointment of service providers.

6. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserves the right to negotiate the bidder's price.
3. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned will NOT be accepted.
5. Bidders must submit a valid B-BBEE Certificate from SANAS Accredited Verification Agency or issued by Companies and Intellectual Property Commission (**CIPC**) for allocation of points for specific goals.
6. Specific goals shall not be allocated where supportive documents as stated in the bid documents are not provided.
7. Bids submitted are to hold good for a period of **90 days**.
8. Companies who bid as a joint venture must submit one valid B-BBEE certificate from SANAS Accredited Verification Agency for specific goal points.
9. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
10. All suppliers must be registered on the Central Supplier Database. No bid shall be awarded to any supplier that is not registered on the Central Supplier Database (**CSD**).
11. Companies that are in the process of de-registration in the CIPC shall not be considered
12. The ETDP SETA remains the sole owner and custodian of all content, material, or any other form of development. No information of or on behalf of the ETDP SET may be shared, during the duration or after the closing period of the project. It remains the responsibility of the appointed service provider to hand over all material to the ETDP SETA. Should a service provider wish to have the ETDP SETA as a referral, permission for this must be sought.

7. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain Management > Open Tenders as from **12h00** on **07 July 2023**.

Bidders must submit technical and financial proposals in **one (1) USB** clearly marked **“Folder A-Technical Proposal” and “Folder B- Financial Proposal”**.

Folder B - (Financial Proposal) Costing Model (*Price must be final, include VAT and signed*), Submit a *“Unique security personal identification number (PIN) issued by SARS” which the SETA will use to verify the bidder’s tax matters prior to the award*, Invitation to Bid - **SBD1**, Declaration of Interest – **SBD 4 (New)**, Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 -**SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals** and B-BBEE certificate or sworn affidavit (*If claiming preferential points*) – *this will be used to verify points to be allocated for specific goals*.

The financial proposal will only be opened when the tender is responsive in Stage 2 or at the discretion of the ETDP SETA.

All Bids/Proposals (completed in [one (1) USB] must be courier or hand delivered to:

The ETDP SETA – Head Office
ETDP SETA House
2-6 New Street
Gandhi Square
Johannesburg South - CBD
2091

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00 on 04 August 2023**.

No late submission will be accepted!

8. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 04 August 2023**.

9. CONTACT PERSON

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID. All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain Manager: Email: Tenderers@etdpseta.org.za

Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.