

TERMS OF REFERENCE – REQUEST FOR QUOTATIONS (RFQ)

PROVISION, INSTALLATION, SUPPORT AND MAINTAIN A CUSTOMER RELATIONSHIP MANAGEMENT TOOL FOR A PERIOD OF TWO (2) YEARS.

Food & Beverages Manufacturing Sector Education and Training Authority (FoodBev SETA) hereby invites you to submit quotations for the provision, installation, support, and maintenance of a Stakeholders Relations Management System.

Closing date of submission	25 October 2022
Closing time of submission	14:00
Quotes to be e-mailed to	scm@foodbev.co.za
All quotes must be valid for at least	30 days
Delivery address for the services	7 Wessels Road, Rivonia, Johannesburg

All queries/ clarifications can be sent in writing, citing the bid reference above to the under-mentioned person before the closing date for the quote:

Administrative (process related) queries may be addressed to:

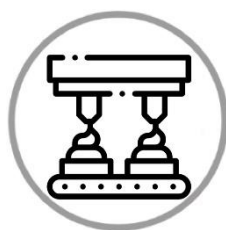
Queries address to	Mr Lunga Mokoena
Telephone Number: Landline	011 253 7300
e-mail address to send queries	scm@foodbev.co.za

Technical or deliverable related queries may be addressed to:

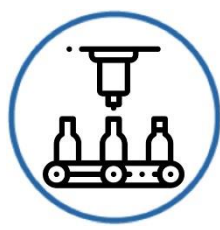
Queries address to	Ms Makatseng Mokome
Telephone Number: Landline	011 253 7300
e-mail address to send queries	MakatsengM@foodbev.co.za

1. BACKGROUND

- 1.1. FoodBev SETA is a Schedule 3A Public Entity established in terms of the Skills Development Act 97 of 1998. FoodBev SETA is currently operating in Johannesburg at number 7 Wessels Road, Rivonia. FoodBev SETA's function is to promote, facilitate and incentivize skills development in the food and beverages manufacturing sector. FoodBev SETA is one of 21 Sector Education and Training Authorities (SETAs) across the economy mandated to facilitate the delivery of skills development in the country in line with National Skills Development Plan (NSDP) outcomes.
- 1.2. Food & Beverages Manufacturing Sector Education and Training Authority's (FoodBev SETA) function is to promote, facilitate and incentivise skills development in the Food and Beverage Manufacturing Sector.
- 1.3. FoodBev SETA is subdivided into 5 chambers:



Baking, Cereals,
Confectionery &
Snacks (BCCS)



Beverage
Manufacturing



Dairy
Manufacturing



Manufacture of
Food
Preparation
Products



Processed and
Preserved Meat,
Fish, Fruit, and
Vegetables

1.4. Our Vision Statement

- To have sufficient and appropriate knowledge and skills available in the Food and Beverages Manufacturing Sector.

1.5. Our Mission Statement

- To expand the availability and accessibility of knowledge and skills in the sector, including but not limited to, rural areas.
- Establish a credible institutional mechanism that facilitates skills development with greater efficacy; and
- To remain relevant by providing quality learning standards and qualifications.

1.6. Our Values

FoodBev SETA subscribes and is committed to:

- Service excellence: take pride in satisfying stakeholder needs.



- Accountability: accept responsibility and delivering on our commitments.
- Integrity: act with integrity in all we do (doing what's right).
- Respect: deliver on our commitments with the utmost respect towards our stakeholders

2. PURPOSE

- 2.1. FoodBev SETA is seeking to appoint a service provider with suitable expertise to provide, implement, support, and maintain a Customer Relationship Management (CRM) Tool that will provide capabilities and functionalities to improve the service delivery to the organization's stakeholders.
- 2.2. FoodBev SETA engages with various types of stakeholders in different environments and not limited to commercial businesses in the food and beverages manufacturing sectors, government entities, institutions of higher learning, and other key industry bodies instrumental in the SETA meeting its mandate. This requires handling of numerous types of queries, complaints, and other stakeholder related service requests, emanating from these daily organisational activities.
- 2.3. The volume of queries currently is handled manually, and it presents risks in the manner that stakeholder queries and support is being recorded, categorised, tracked, and managed which may result in ineffective support and an unsatisfied stakeholder population. This ultimately impacts negatively to the organization's goal of achieving optimised stakeholder experience and satisfaction.

3. SCOPE OF WORK

3.1. Central Stakeholder Database

- Currently FBS has multiple databases where stakeholders are recorded and updated.
- The system therefore must be able to import stakeholder information from different sources (databases) such as FBS Management Information System, Spreadsheets etc, to feed into the central stakeholders database
- The system must be able allow for stakeholders to update their details when required to guarantee the credibility of the information and database for communication purposes (i.e., quarterly)

3.2. Bulk Communication

- FBS has no specialised bulk communication solution.
- The system must be able to send bulk emails and SMSs to stakeholders, and in some instances segmented by size, sector etc.
- The system must be able to record communication activities done with specific stakeholder(s) for reference should a need arise.
- The system must be able to determine delivered, bounced, opened or undelivered emails.



3.3. Incident/Service Management

- The system must be able to record, track, escalate/de-escalate incidents/queries logged by Stakeholders until they are resolved.
- The system must issue and automatically send an email with the unique reference for all incidents/queries logged by stakeholders.
- The system must link logged incidents/service requests to relevant stakeholders' profiles in the database to keep historical information of stakeholders' queries and service requests.

3.4. Reporting

- The system must provide a customizable Reporting Dashboard with insights or various activities that the tool is intended for.
- The system must cater for development of customised reports.

3.5. Integration/interfaces

The system must be able to integrate with the following but not limited:

- Microsoft Exchange/Outlook
- ManageEngine ServiceDesk Plus (FoodBev SETA uses this tool for service management hence the requirement)
- Mail merge functionality

3.6. Training

- The service provider is required to train all the users of the system.
- Training manuals will be required.

3.7. Licenses

- 20 x Users

4. THE RFQ EVALUATION PROCESS

The RFQ will be evaluated in accordance with the following three stages:

- 4.1. Stage 1: Compliance evaluation** – bidders will first be evaluated in terms of compliance criteria. This includes submission of mandatory administrative documentation. Bidders who do not fulfil all the requirements or do not submit required documents will be disqualified and not move onto the next stage of evaluation.
- 4.2. Stage 2: Functional criteria** – Functionality points are equal to **100 points**.
 - The bidders must score must achieve a minimum score of 70,00 points to qualify to be evaluated on BBBEE & Price.
 - All bidders who do not score the minimum points will be disqualified.
- 4.3. Stage 3: Price and BBBEE status level of contributor** and this will be evaluated on an 80/20 preferential procurement principle



5. CRITERIA 1 - COMPLIANCE EVALUATION

5.1. The Bidders must submit:

- 5.1.1. The Bidder is required to provide proof accreditation as an OSD (Original Software Developer) or proof from OSD that the bidder is an authorised distributor or proof from distributor that bidder is an authorised reseller of the proposed ERP Solution
- 5.1.2. Must be registered on the National Treasury CSD (Central Supplier database): A full report must be submitted.
- 5.1.3. Standard Bidding Documents (SBD) forms: (SBD 1, SBD 4, & SBD 6.1): completed and signed by the duly authorized person
- 5.1.4. Tax clearance certificate and Pin.

Failure to submit the above documents will result in the bidder being disqualified.

6. CRITERIA 2 - FUNCTIONALITY EVALUATION

1. COMPANY EXPERIENCE	Bidders must have a minimum of five (5) years relevant experience in providing, installing, and maintaining CRM systems and/or tools with at least three (3) projects completed.	
a) Experience in conducting stakeholder satisfaction surveys:		
• More than 10 years	20,00 Points	20,00
• 8 to 10 years	15,00 points	
• 5 to 7 years	10,00 points	
• Less than 5 years	0,00	
Means of verification: Bidders must submit a sample, i.e., 3 completed CRM projects completed within the last five years. All bidders need to submit evidence of implemented projects of a similar nature. A redacted version will be considered for the protection of private information.		
b) Company references where similar work has been rendered:		
• 3 reference letters	30,00 points	30,00
• 2 reference letters	20,00 points	
• 1 reference letter	10,00 points	
• 0 reference letters	0,00 points	
Means of verification: Bidders must submit at least three (3) positive references where similar work was undertaken in the last five (5) years. Preferably, reference letters to be submitted must be for the reports given above.		
2. EXPERIENCE OF THE PROJECT MANAGER CV of Team Leader/Project Manager with experience, with a minimum of an NQF	Must have a minimum of 8 years CRM experience in all business sectors for the implementation, and / or development and	



level 8 Qualifications in ICT or related sectors	support of a CRM system. Must also have a minimum NQF level 6 qualification	
CV of Team Leader with experience and Qualifications in Research and/or Communications.		
Experience:		
• More than 15 years.	10,00 points	10,00
• 11 to 15 years.	8,00 points	
• 8 to 10 years.	5, 00 points	
• Less than 8 years	0,00 points	
Qualifications		
• NQF Level 10 qualification	10,00 points	10,00
• NQF Level 9 qualification	8,00 points	
• NQF Level 8 qualification	5, 00 points	
• Less than NQF level 8	0,00 points	
Means of verification: CV and qualifications of the project manager		
3.EXPERIENCE OF THE PROJECT TEAM CVs of core team members with individual experience and qualifications in CRM implementation and/or Communications:	Bidders must submit CVs of all the key project personnel (not less than 2 members of the core team) that will be assigned to the project clearly indicating a minimum of five (5) years individual relevant experience & qualifications in Research and/or Communications	
Experience		
• More than 10 years.	5,00 points	5,00
• 8 to 10 years.	3,00 points	
• 5 to 8 years.	2,00 points	
• Less than 5 years	0,00 points	
Qualifications		
Above NQF level 8 qualification	5,00 points	5,00
NQF Level 8 qualification	3,00 points	
NQF Level 7 qualification	2,00 points	
Less than NQF level 7 qualification	0,00 points	
Means of verification: CVs and qualifications of the two project team members		
4.PROJECT PROPOSAL & IMPLEMENTATION PLAN	Bidders must submit a proposal indicating the proposed high-level methodology / approach, which must demonstrate their understanding of the requirements, including timeframes, resources to be assigned to the project as well as dependencies and lastly the system to be utilised.	



Proposal that demonstrates an understanding of the assignment, including proposed methodology and approach that are aligned to FoodBev SETAs outputs and timeframes, resources, and dependencies <ul style="list-style-type: none">Bidder shows exceptional/excellent understanding of requirementsBidder shows full understanding of requirementsBidder shows limited understanding of requirements	The Bidder must provide a detailed project plan that demonstrates an understanding of the project, implementation plan and is within the reasonable time frame. A detailed Project Plan should clearly indicate the following: [1] Project Activities [2] Duration [3] Timeframes [4] Resources [5] Means of verification	
Project plan scoring		
Bidder failed to address all the points = 0 Points	0,00 points	20,00
Bidder addressed 1 out 5 items = 1 Point	2,00 points	
Bidder addressed 2 out 5 items = 2 points	5,00 points	
Bidder addressed 3 out 5 items = 3 Points	10,00 points	
Bidder addressed 4 out 5 items = 4 Points	15,00 points	
Bidder addressed 5 out 5 items and more = 5 Points	20,00 points	
Means of verification: Bidders proposal and implementation plan addressing all the above required elements relevant to the study.		
Total		100,00

7. CRITERIA 3 – PRICE AND POINTS

7.1. PREFERENCE POINTS ALLOCATION

The 80/20 preference point system for acquisition of goods or services for Rand value equal to or above R30 000 and up to R50 million as follows:

CRITERIA	SUB-CRITERIA	POINTS
Price	Detailed budget breakdown	80
BBBEE Status Level Verification certificate from accredited verification agencies	BBBEE Level Contributor	20
Total Points		100



8. CONDITIONS OF CONTRACT

The successful service provider undertakes:

- a) To treat all relevant and available data and/or information provided by the FoodBev SETA and its employees strictly confidential.
- b) Not to discuss or make any information available to any member of the public, press or other service provider/consultant or any other unauthorized person(s) except as authorized by the Chief Executive Officer of FoodBev SETA or her delegate.
- c) Not to copy or duplicate any software or documentation for private use.
- d) To give back to the FoodBev SETA all documentation, reports, programmes etc upon completion of the project.
- e) General conditions of the request for quotation (RFQ), contracts and orders will be applicable in the execution of the contract.
- f) Parking and travel between the prospective service provider's office and the venue selected by the SETA will be borne by the Service Provider.
- g) Failure to adhere to the above conditions will lead to the invalidation of the quotation.
- h) FoodBev SETA reserves the right to discontinue work on any element of the quotation at any given time in consultation with the Chief Executive Officer of the FoodBev SETA, for example the quality of work delivered is poor or the service provider is unduly delaying delivery of service.
- i) Enter into a Service Level Agreement with the FoodBev SETA, where applicable or necessary.

9. PROCEDURES FOR SUBMITTING PROPOSALS

- 9.1. Proposals must be submitted to: scm@FoodBev.co.za.
- 9.2. Physical and late submissions will not be considered.
- 9.3. The closing date for proposals is 25 October 2022 at 14:00.

10. SIGN OFF

Compiled by: Ms. Makatseng Mokome – Senior Manager: Stakeholder Relations

Date: 6 October 2022

Signature:



Recommended and supported by: Mr. Siyabonga Dyosiba - Senior Manager: ICT

Date: 6 October 2022

Signature:

