

**SOUTH AFRICAN**



**CIVIL AVIATION  
AUTHORITY**

**Provision of Microsoft Dynamics 365 Customer Relationship Management (CRM) - Enhancements, Configuration and Support Maintenance Services for a period of two (2) years**

RFQ Number: RFQ/ZD/MSDYNAMICS365CRM/CS/639/2024-2025

***NB: Please hand deliver by Wednesday, 11 December 2024, 11h00***

## 1. Introduction

The South African Civil Aviation Authority (“SACAA”) is a Schedule 3A public entity in terms of the Public Finance Management Act (“PFMA”). SACAA was established on the 1st of October 1998, following the enactment of the now repealed South African Civil Aviation Authority Act, 1998 (Act No.40 of 1998). The aforementioned Act was repealed as a whole by the Civil Aviation Act, Act 2009, and (Act No.13 of 2009). SACAA is an agency of the Department of Transport.

The Civil Aviation Act, Act 2009, (Act No.13 of 2009) provides for the establishment of a stand-alone authority mandated with controlling, promoting, regulating, supporting, developing, enforcing, and continuously improving levels of safety and security throughout the civil aviation industry. The above is to be achieved by complying with the Standards and Recommended Practices of the International Civil Aviation Organisation whilst considering the local context.

## 2. Invitation to Bid

SACAA has successfully implemented Microsoft Dynamics 365 Client Relationship Management (CRM) solution, enhancing our ability to manage client service enquiries across various platforms and implement service-level agreement (SLA) management. The use of MS Dynamics 365 CRM within our organisation has significantly improved customer relationships and service levels. We anticipate further integration of the contact centre with other existing systems into Microsoft Dynamics CRM, providing enhanced functionality for data lookup by our Agents.

The purpose of this invitation is to appoint a suitable and qualified service provider that will provide resources based on the set requirements to provide various services within the SACAA Application Environment on the MS Dynamics 365 CRM Solution on an as-and-when-required basis for a period of two years at an agreed hourly rate per year.

## 3. Scope of Work

The ICT team has installed and configured the basic setup of the MS Dynamics 365 CRM solution for the Customer Relationship Management unit. **SACAA is looking for a service provider to enhance, configure and maintain the system as and when required to align with the Contact Centre Business Requirements and ensure an acceptable level of up-time.**

*The service will be provided over a period of two (2) years and a bucket of 300 hours will be allocated to be used for various services as and when requested by SACAA. The bidders must submit their hourly rate based on the table below. Please note that a contract will be concluded with the successful bidder outlining how the relationship will be managed.*

SACAA is looking for a service provider to provide the following services as and when required, including skills transfer to the SACAA ICT Personnel:

<b>CONFIGURATION</b>	As per Business Processes notations.
<b>FUNCTIONALITY ENHANCEMENTS, AND SYSTEM INTEGRATION</b>	Enhancement functionalities in the existing Integration of system as and when requested.
<b>MIGRATION OF APPLICATIONS</b>	Migration of applications to required platform.
<b>DATA EXTRACTION AND INFORMATION DISPLAY</b>	Ensure that data is pulled/extracted correctly from systems and the information is displayed correctly on the system which will be used to view the extracted data.
<b>SOLUTION SUPPORT AND MAINTAINANCE ON A CALL OUT HOURLY RATE BASES</b>	Provide application support post implementation on an as when required basis Do System health checks as and when requested by SACAA. Ensure the applications functionality remains intact by testing it post any system changes/upgrades. The partner support maintenance is for two years, subject to satisfactory performance.

The system has been configured in compliance with ICT security policy. (Compliance with ICT legislation PAIA and POPI Acts, etc.).

#### 4. **Content of the Proposal**

A detailed proposal with information on the MS Dynamics 365 CRM including all the requirements of SACAA is expected.

#### 5. **Evaluation Criteria**

##### 5.1 **PHASE 1 – SCM MANDATORY COMPLIANCE REQUIREMENTS**

Bids received will be verified for completeness and correctness. SACAA reserves the right to accept or reject a bid based on the completeness and correctness of the documentation and information provided. The set of bidding documents must be completed and submitted. **(SACAA reserves the right to request information/additional documents if there are any missing from the bidder(s) submission).**

Bidders are to ensure that they submit the following documentation/ information with their bid.

Document	Comments	Compulsory requirement
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Proof of registration on the Central Supplier Database (CSD) of the National Treasury	Prospective bidders must be registered on the Central Supplier Database (CSD) prior to submitting bids. Please indicate/supply the supplier number.	Yes
SBD 3 (Pricing Schedule)	Completed	Yes
SBD 4 (Bidders Disclosure)	Completed and signed	Yes
SBD 6.1 (Preferential Procurement Point)	Completed and signed	Yes
Provide a valid partnership certification	Bidder to provide a valid Microsoft Gold Partner	Yes

## 5.2 PHASE 2 – TECHNICAL EVALUATION

Assessment of Technical / Functional evaluation of the bid will be done in terms of the criteria as stated in the table below.

Bidders should take note of the Criteria, Weighting and Scoring when responding to this bid.

**Table 1: Technical Evaluation of the MS Dynamics 365 CRM**

TECHNICAL EVALUATION			
SUB-CRITERIA	DESCRIPTION	POINTS	
		MIN	MAX
<b>Methodology</b>	<p>Bidder must submit a detailed proposal which includes the methodology, project plan and change management - <b>20 points</b></p> <p>Bidder must submit a detailed proposal which includes:</p> <ul style="list-style-type: none"> <li>• methodology,</li> <li>• project plan,</li> <li>• change management and,</li> <li>• training plan for ICT support and user department, MS Project and PowerPoint presentation - <b>30 points</b></li> </ul> <p><b>NB:</b> Detailed proposal not submitted or doesn't cover minimum of the three (3) topics required = <b>0 points</b></p>	<b>20</b>	<b>30</b>

<b>CRM Reporting</b>	<p>The Bidder must detail the possible reporting that can be done from the CRM and what purpose these reports can be used for. These reports should be configured and the personnel in Client Services should be able to generate these reports on their own.</p> <ul style="list-style-type: none"> <li>- Reports less than six (6) = <b>0 points</b></li> <li>- Reports more than seven (7) = <b>30 points</b></li> </ul>	<b>30</b>	<b>30</b>
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<b>Company Technical Expertise</b>	<p>Bidder must demonstrate proven track record of minimum of five (5) years' technical experience in <b>MS Dynamics 365 CRM</b>, with at least three (3) CRM Implementations with contactable references:</p> <p>Bidders are required to demonstrate that they have worked on (and completed) a minimum of three (3) projects, from three (3) different companies, where <b>MS Dynamics 365 CRM</b> was successfully implemented, maintained, and supported. To demonstrate this requirement, bidders must submit provide:</p> <ul style="list-style-type: none"> <li>- Three (3) Reference letters with contactable references. The letters must be on the Client letterhead and have contact details (email or contact number) as well as the signature/stamp of the writer – <b>10 points</b></li> <li>- Three (3) or more Sample of what was implemented - not older than three (3) years – <b>5 points</b></li> <li>- Less than three (3) Sample of what was implemented - not older than three (3) years – <b>5 points</b></li> </ul>	<b>15</b>	<b>20</b>
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<b>Key Personnel &amp; Project Lead</b>	<p>Previous experience of the team lead/Key Personnel in deploying Microsoft Dynamics 365 Customer Relationship Management (CRM) project as a project lead, developer and integrations specialist</p> <ul style="list-style-type: none"> <li>- More than 5 years' experience in deploying Microsoft Dynamics 365 Customer Relationship Management (CRM) project as a configuration specialist. – <b>20 points</b></li> <li>- A minimum of 3 - 5 years' experience in deploying Microsoft Dynamics 365 Customer Relationship Management (CRM) project as a configuration specialist. – <b>15 points</b></li> <li>- Less than 3 years' experience in deploying Microsoft Dynamics 365 Customer Relationship Management (CRM) project as a configuration specialist. – <b>0 points</b></li> </ul> <p><b>NB:</b> Submit curriculum vitae of the project lead and all key personnel to be assigned to this project (experience, qualification)</p>	<b>15</b>	<b>20</b>
<b>TOTAL POINTS FOR TECHNICAL EVALUATION</b>		<b>80</b>	<b>100</b>

The bidder shall be required to score a minimum of **80** points or more out of **100** on technical evaluation to be considered further for Price and SPECIFIC GOAL. Any bidder scoring less than **80** will not be considered for further evaluation.

### 5.3 PRICE AND SPECIFIC GOAL EVALUATIONS

Bidders who comply with the requirements of this bid will be evaluated according to the preference point scoring system as determined in the Preferential Procurement Regulations, 2022 pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act No 5 of 2000).

For this bid 80 points will be allocated for Price and 20 points for SPECIFIC GOAL.

- 5.3.1 This tender will be evaluated using the 80/20 preferential point system. The following PPPFA formula will be used to evaluate the price

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

$P_s$  = Points scored for the price of the bid under consideration.

$P_t$  = Rand value of the bid under consideration.

$P_{\min}$  = Rand value of the lowest acceptable bid.

- 5.3.2 Only bidders that have achieved the minimum qualifying points on functionality will be evaluated further in accordance with the 80/20 preference point system as follows:

Points for this bid shall be awarded for:

5.3.2.1 Price; and

5.3.2.2 Specific Goal.

**The maximum points for this bid are allocated as follows:**

	POINTS
PRICE	80
SPECIFIC GOAL	20
<b>Total points for Price and SPECIFIC GOAL</b>	<b>100</b>

#### **POINTS AWARDED FOR A SPECIFIC GOAL**

In terms of the Preferential Procurement Regulations 2022, points will be awarded for specific goals in accordance with the table below:

<b>SPECIFIC GOALS (B-BBEE Status Level of Contributor)</b>	<b>Number of points</b>
1	20
2	18
3	14
4	12
5	5
6	6
7	4
8	2
Non-Compliant contributor	0

#### **6 NON - COMPULSORY SITE VISIT TO THE NEW SACAA BUILDING**

There will be no briefing session and any service provider that may seek further clarity can send their queries to Ms Zodwa Duma at [duman@caa.co.za](mailto:duman@caa.co.za) to seek any clarity on the bid document. All requests must be submitted via email.

## **7 SUBMISSION OF BID DOCUMENT**

The bid submission requires three (3) envelope system

### **7.1 Envelope 1 – Mandatory documents**

All mandatory documents on Phase 1.

### **7.2 Envelope 2 – Technical Proposal**

Technical proposal in Phase 2

### **7.3 Envelope 3 – Price and Specific Goals**

Quotation and valid B-BBEE certificate/ affidavit

***The pricing schedule shall be submitted on a separate envelope from the technical proposal for ease of evaluation, as these will be evaluated separately. Bidders are required to provide a detailed price schedule breakdown, with the hourly rate, indicating the services included to the rate.***

**NB: All bid documents shall be hand delivered to SACAA offices, Tender Box, Building 16, Treur Close, Waterfall Office Park, Bekker Street, Midrand by Wednesday, 11 December 2024, 11h00.**