



### REQUEST FOR QUOTATION (RFQ)

The South African Qualifications Authority (SAQA) invites Service Providers to submit a quotation for the requirements stipulated below:

DOCUMENT NUMBER:	Develop a board pack management application/solution for SAQA
RFQ ISSUE DATE:	12 March 2024
RFQ CLOSING DATE AND TIME:	22 March 2024 @11:00 am
RFQ VALIDITY PERIOD:	120 Days (from the RFQ closing date)
DESCRIPTION:	To develop a board pack management application with Microsoft Power Automate that integrates with Microsoft Teams for SAQA
RESPONSES TO THIS RFQ SHOULD BE EMAILED TO:	<a href="mailto:rfq@saqa.org.za">rfq@saqa.org.za</a>
ENQUIRIES	<a href="mailto:LMaila@saqa.org.za">LMaila@saqa.org.za</a> 012 431 5158

## **1. TERMS OF REFERENCE**

### **INTRODUCTION**

- 1.1. The South African Qualifications Authority (SAQA) is a juristic person under the National Qualifications Framework Act, 67 of 2008 (NQF Act) and a schedule 3(A) national public entity under the Public Finance Management Act, 1 of 1999. SAQA performs its statutory functions subject to the NQF Act and is responsible for overseeing the implementation and further development of the National Qualifications Framework (NQF) and ensuring the achievement of its objectives.
- 1.2. The objectives of the NQF are to –
  - 1.2.1. create a single integrated national framework for learning achievements.
  - 1.2.2. facilitate access to, and mobility and progression within, education, training and career paths.
  - 1.2.3. enhance the quality of education and training; and
  - 1.2.4. accelerate the redress of past unfair discrimination in education, training, and employment opportunities.
- 1.3. The NQF consists of three qualifications sub-frameworks (for [a] General and Further Education and Training, [b] Higher Education, and [c] Trades and Occupations), and its objectives are designed to contribute to the full personal development of each learner and the social and economic development of the nation at large.
- 1.4. SAQA is the custodian of the NQF, coordinates the three qualifications sub-frameworks, and plays a pivotal role in the entire education and training sector.

## **2. PURPOSE**

- 2.1. SAQA seeks to appoint a competent Service Provider to develop a Board pack management Application using Microsoft Power Automate and integrate it with Microsoft Teams.

### **3. SCOPE OF SERVICES REQUIRED**

#### **3.1. The required board room solution must include but not be limited to the following:**

- 3.1.1. Develop Board Pack Management Application on the Microsoft Power Automate platform.
- 3.1.2. Define data migration plan and roadmap.
- 3.1.3. Access to the most up-to-date board packs and meetings through apps and the web.
- 3.1.4. Ability to create and manage dynamic board meeting packs on the application.
- 3.1.5. Create decision and action lists and track progress with actions.
- 3.1.6. Create draft minutes.
- 3.1.7. Scheduling of meetings with auto invitations and notifications.
- 3.1.8. Review meetings and documents securely both online and offline, past, and present.
- 3.1.9. Mark private and shared annotations, highlights, text, notes, and actions on documents.
- 3.1.10. Join board meetings from remote locations via in-app audio and video conference.
- 3.1.11. Live presentation of documents during meetings.
- 3.1.12. Sign documents with eSignature.
- 3.1.13. Make decisions by e-voting.
- 3.1.14. Do quick whiteboard meetings, anytime.
- 3.1.15. Collate electronic board packs with a single click.
- 3.1.16. Instant distribution of board packs including last-minute updates.
- 3.1.17. Upload documents and meeting materials via easy drag-and-drop.
- 3.1.18. Give access to the meeting pack through the tool
- 3.1.19. Keep track of document versions.
- 3.1.20. Export the meeting pack as a PDF.

- 3.1.21. Support multiple boards and committees set up.
- 3.1.22. Cater for SAQA users and external invitees.
- 3.1.23. Define test plans and cases.
- 3.1.24. Integration with SAQA Azure AD.
- 3.1.25. Board Pack Document Management Features.
- 3.1.26. Review pack.
- 3.1.27. Comment Functionality.
- 3.1.28. Board Pack Task Management Features.
- 3.1.29. Board Pack Meeting Scheduling Features.
- 3.1.30. Roles and Permissions.
- 3.1.31. User Acceptance Testing Support.
- 3.1.32. Develop Operational Guides.
- 3.1.33. Pilot Deployment.
- 3.1.34. Operational Handover.

## 3.2. **Security and Availability.**

- 3.2.1. Secure data hosting on SSAE18 and ISO27001-compliant infrastructure
- 3.2.2. Strong AES-256 encryption, authentication, and authorization mechanisms
- 3.2.3. Access permission setting to enforce document confidentiality

## 3.3. **Platform, Integration, and Migration.**

On-premises and Cloud hosting SSO, AD, LDAP Integration.

- 3.3.1. Document Management System.
- 3.3.2. Integration with Microsoft, Teams etc.
- 3.3.3. Performance testing.
- 3.3.4. Organizational change management, and third-party monitoring tools.
- 3.3.5. Providing additional documentation.
- 3.3.6. Hardware-related activities such as hardware installation, configuration, and cable-related activities.

- 3.3.7. Preparation activities for servers or workstations in sites.
- 3.3.8. Development of custom search components.
- 3.3.9. Development of custom statistical and web analytical reports.
- 3.3.10. Design Customisation Themes.
- 3.3.11. Migration of all data.
- 3.3.12. Product licenses and hardware.
- 3.3.13. Authentication and identity management.
- 3.3.14. Reporting and Monitoring.
- 3.3.15. Organizational change management.
- 3.3.16. Design or redesign of the Customer's functional Organisation.
- 3.3.17. Networking and the availability to print.

#### **4. MANDATORY REQUIREMENTS**

- 4.1. The bidder should submit the **SharePoint Development and Administration certificate for one of their engineers who will be part of the Development.**
- 4.2. The bidder must have and submit a valid proof of a **Microsoft Gold Partnership certificate**
- 4.3. The bidder should submit a **minimum of three (3) formal reference letters from clients where it has previously developed the Board pack management Application that integrates with Microsoft Teams.**

The reference letters should:

- a) Be on the client's letterhead;
- b) Be signed and dated;
- c) Indicate the work done;
- d) Indicate the year the work was done, (please note that the reference letters should be within 5 years of the RFQ closing date; and
- e) Show the client's contact details including contact name and telephone or email address.

## 5. DURATION OF CONTRACT

SAQA will enter a twelve (12) months contract (SLA/PO) with the recommended service provider.

## 6. PRICING SCHEDULE

<u>DESCRIPTION OF THE SERVICE</u>	<u>Total</u>
1. Functional Requirement Specification with stakeholders including sign-offs.	
2. Development and testing of the Application. (Six months including UAT Signoffs)	
3. Integration and Migration.	
4. Implementation.	
5. Monthly maintenance and support including enhancements after implementation ( <b>Provide the monthly rate for evaluation and budget purposes only</b> ).	
<u>Additional Items that might have been omitted</u>	
<b>Total (VAT inclusive)</b>	<b>R</b>

## 7. EVALUATION CRITERIA

The proposal will be evaluated in two (2) stages:

**Stage 1:** Admin and mandatory requirements

**Stage 2:** Price and Preference Points Evaluation

Only bidders that pass the mandatory requirements as per paragraph 4 above will be evaluated in terms of the 80/20 system prescribed by SAQA in line with PPR 2022 as follows:

- i. 80 Points for pricing
- ii. 15 preference points for the company that has at least 51% black ownership
- iii. 5 reference Points for the company that has at least 30% black woman ownership.

**NB: Bidders must submit the certified B-BBEE Certificates copies/Sworn Affidavits indicating ownership percentage to claim the preference points.**

## 8. SPECIAL CONDITIONS

RFQ Special Conditions	
1.	Bidders must state their National Treasury (CSD) Central Supplier Database's Supplier Number or Unique Number and Tax Pin in their bids to enable SAQA to confirm suppliers' tax status.
2.	Bidders must submit an original or certified copy of the B-BBEE certificate or Sworn Affidavit as per the B-BBEE Act. The SANAS Logo should be visible on the B-BBEE Certificate.
3.	Bidders must complete, sign, and submit SBD 4 and SBD 6.1 forms.
4.	The proposal and required documents must be submitted using the PDF format only, through email to <a href="mailto:rfq@saga.co.za">rfq@saga.co.za</a> .
5.	<b>PROTECTION OF PERSONAL INFORMATION</b> <ul style="list-style-type: none"><li>a. In this clause, the words "personal information", "processing" and "responsible party" have the meanings ascribed to them in the Protection of Personal Information Act, 2013 (Act No.4 of 2013).</li><li>b. SAQA will comply with the Protection of Personal Information Act, 2013 (Act No.4 of 2013, (POPIA) by lawfully processing personal information submitted by bidders in accordance with the conditions of lawful processing as set out in POPIA.</li><li>c. All bidders must comply with their obligations as set out in POPIA for which they are a Responsible Party before sharing any information with SAQA.</li><li>d. SAQA will not be held liable for any non-compliance with the provisions of POPIA or unlawful processing or sharing of information by a bidder.</li></ul>

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.



with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....  
 .....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....  
 .....

### **3 DECLARATION**

I, \_\_\_\_\_ the \_\_\_\_\_ undersigned,  
 (name)..... in  
 submitting the accompanying bid, do hereby make the following  
 statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	.....
Signature	Date
.....	.....
Position	Name of bidder

## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	
SPECIFIC GOALS	
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

#### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 \mathbf{Ps} = \mathbf{80} \left( \mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left( \mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right)
 \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

#### 3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

Where

- Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration  
Pmax = Price of highest acceptable tender

### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of —
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**

***(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.***

***Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)***

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Atleast 51% Black Owneship		15		
Atleast 30% Black Women Ownership		5		

#### **DECLARATION WITH REGARD TO COMPANY/FIRM**

4.3. Name of company/firm.....

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary.

.....  
**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

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