



social development

Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Private Bag X901, Pretoria, 0001
Enquiries: Z Mantantana, Email: ZolisaM@dsd.gov.za

Sir/Madam

**REQUEST FOR PROPOSALS FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE
PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF AN
APPLICATION PERFORMANCE MONITORING TOOL**

1. Tender No: **SD02/2022**
2. Closing Date: 20 June 2022 at 11:00
3. The following documents form part of this invitation for a proposal:
SBD1: Invitation to bid
SBD3.3: Pricing Schedule
SBD4: Declaration of Interest
SBD6.1: Preference points Claim Form
4. **All the documents accompanying this invitation must please be completed in detail, where applicable and returned with your Bid.**
5. Please make sure that your bid reaches this office before the closing time and date
6. When submitting your bid the following information must appear on the sealed envelope:
 - i. Name and address of the Bidder
 - ii. Bid number
 - iii. Closing Date
7. This envelope can be placed in the Bid box in the foyer at HSRC Building, 134 Pretorius Street, Pretoria
8. Compulsory briefing session

Kind regards

DIRECTOR: SUPPLY CHAIN MANAGEMENT

DATE: 27/05/2022

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NATIONAL DEPARTMENT OF SOCIAL DEVELOPMENT)					
BID NUMBER:	SD02/2022	CLOSING DATE:	20 JUNE 2022	CLOSING TIME:	11:00
DESCRIPTION	APPOINTMENT OF SERVICE PROVIDER FOR THE PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF AN APPLICATION PERFORMANCE MONITORING TOOL				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT HSRC Building, 134 Pretorius Street, Pretoria					
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No			<input type="checkbox"/> No	
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
		NAME:			
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs& QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	[IF YES ENCLOSE PROOF]			[IF YES ANSWER PART B:3 BELOW]	
SIGNATURE OF BIDDER		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)					
TOTAL NUMBER OF ITEMS OFFERED					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL INFORMATION MAY BE DIRECTED TO:		
DEPARTMENT/ PUBLIC ENTITY	Social Development		CONTACT PERSON	Ms M Nkhethoa	
CONTACT PERSON	Mr Z Mantantana		TELEPHONE NUMBER		
TELEPHONE NUMBER			FACSIMILE NUMBER		
FACSIMILE NUMBER			E-MAIL ADDRESS	MapasekaN@dsd.gov.za	
E-MAIL ADDRESS	ZolisaM@dsd.gov.za				

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:	
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.	
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR ONLINE	
1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.	
1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.	
1.5. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.	
2. TAX COMPLIANCE REQUIREMENTS	
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.	
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.	
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.	
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.	
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.	
2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.	
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.	

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

PRICING SCHEDULE
(Professional Services)

BID NO: SD02/2022	CLOSING TIME 11:00 ON 20 JUNE 2022
NAME OF SERVICE PROVIDER:	

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF VAVULE ADDED TAX
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APPOINTMENT OF A SERVICE PROVIDER FOR THE PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF AN APPLICATION PERFORMANCE MONITORING TOOL

1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.
3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

R.....

4. PERSON AND POSITION

HOURLY RATE

DAILY RATE

.....	R.....

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

.....	R..... days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....

Name of Bidder:

TOTAL: R.....

5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....

TOTAL: R.....

- 6. Period required for commencement with project after acceptance of bid
.....
- 7. Estimated man-days for completion of project
.....
- 8. Are the rates quoted firm for the full period of contract? *YES/NO
- 9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
.....
.....
.....

Any enquiries regarding bidding procedures may be directed to the –

Mr. Zolisa Mantantana
Email: ZolisaM@dspd.gov.za

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 interest¹ 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

¹ 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 consortium² 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

² 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 2017**

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- 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

- a) The value of this bid is estimated **not to exceed** R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

1.3 Points for this bid shall be awarded for:

- (a) Price; and
(b) B-BBEE Status Level of Contributor.

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

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20 **or** **90/10**

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)
 (Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		

Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
 - One person business/sole propriety
 - Close corporation
 - Company
 - (Pty) Limited
- [TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

- Manufacturer
 - Supplier
 - Professional service provider
 - Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a

fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding 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 bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>
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<p>.....</p> <p>SIGNATURE(S) OF BIDDERS(S)</p> <p>DATE:</p> <p>ADDRESS</p> <p>.....</p> <p>.....</p>
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social development

Department:
Social Development
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

REQUEST FOR PROPOSAL

**TERMS OF REFERENCE FOR THE PROCUREMENT,
IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT
OF AN APPLICATION PERFORMANCE MONITORING TOOL**

TERMS OF REFERENCE

TERMS OF REFERENCE FOR THE PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF AN APPLICATION PERFORMANCE MONITORING TOOL

1 PURPOSE

1.1 The purpose of this to request a proposal for procurement, implementation, configuration, maintenance and support of an Application Performance Monitoring (APM) tool.

2 PROJECT NAME

2.1 Application Performance Monitoring Tool, abbreviated as APM.

3 BACKGROUND

3.1 The Department of Social Development (DSD) - Information Management and Systems Technology (IMST) provides IT services to the Department to enable it to do its business operations. IT services include provisioning of network connectivity, hosting infrastructure and business applications.

3.2 Departmental systems are used to provide a wide array of different services and functions to the general public as well as internal end-users. Although there is a drive to centralise service delivery, Provinces do have province unique systems deployed within the Sector Wide environment.

3.3 In order to provide the best possible service to all customers of all systems utilised within the DSD (be it National - or Provincial systems), detailed metrics in terms of the application performance is required. These metrics can be used to gather justifiable measures in terms of system performance.

3.4 *"Gartner defines application performance monitoring (APM) as software that facilitates application monitoring to meet three main functional dimensions: Front-end monitoring, Application discovery, tracing and diagnostics (ADTD), and Analytics"*¹

3.5 By gathering the correct metrics for all the systems deployed in the Social Welfare sector, accurate and detailed reports can be generated in order to ensure that decision makers have the most up to date and relevant information available.

4 PROBLEM STATEMENT AND CURRENT SITUATION

4.1 Problem Statement

4.1.1 Due to the use of disparate systems as well as systems being deployed across security boundaries, there is no central view of when applications are down, what performance issues there with regards to specific application and provide metrics for capacity planning. The inability of National DSD to report on these events have caused

¹ Magic Quadrant for Application Performance Monitoring – Published 22 April 2020.

a delay in service delivery to both external customers (citizens of the country) and internal users (end-users of internal systems).

4.2 Current Situation

4.2.1 Currently there is no central reporting of performance metrics with regards to Information Technology (IT) systems. This have caused a situation where DSD could not provide measured metrics in terms of performance with different applications.

4.2.2 Applications are also distributed in a very heterogenous way, with specific applications deployed in the provinces not necessarily following the same approach as systems deployed within National. Furthermore, applications might be deployed in specific public clouds such as Microsoft Azure (Azure), Amazon Web Services (AWS), and Google Compute Platform (GCP).

4.2.3 Capacity management for applications is currently managed on an ad-hoc basis. This means that there are situations where incorrect metrics are used to perform capacities for specific applications.

5 SCOPE OF WORK

5.1 In order to ensure that all problems (addressed in 4.1 Problem Statement above) are addressed, it is recommended that a fully functional cross-domain heterogenous APM tool is procured, implemented, configured and maintained.

5.2 A successful bidder will have to comply to all the requirements as listed in this section of the document. It is envisioned that a successful bidder will engage in a full contract with the DSD.

5.3 A detailed Service Level Agreement (SLA) will be required for a period of no longer than 36 months. For evaluation purposes a Next Business Day (NBD) response will be required in the bidder's proposal.

5.4 Project Management services will be provided by the successful bidder for the duration of the project. All project management deliverables will be included for the total duration of the project.

5.1 Functional Requirements

5.1.1 All functional requirements are seen as mandatory for the proposal. Where applicable specific sub-areas will be listed that will be needed for the successful completion of this product.

5.1.2 Analysis. An incumbent will be expected to perform a full analysis of the environment and will be required to provide a detailed User Requirement Specification (URS) as well as Functional Requirement Specification (FRS). These requirements will be used in order to perform requirements analysis as well Key Performance Indicators (KPIs) for the success of the total project.

5.1.3 Attribute Based Management. It is expected that the APM tool will have the ability to collect metrics and alert on specific threshold breaches based on specific quantifiable attributes such as response times, CPU usage, Memory usage, Disk Space, etc.

5.1.4 Application Code Based Management. In its most basic form this will include the ability of the tool to capture traces of different transactions and isolating problematic statements in code. It is envisioned that advanced capabilities such as user experience measurements will be included in the tool set. This should allow the DSD to find and investigate problematic code in different applications.

5.1.5 Network Based Application Performance Management. Basic performance management metrics such as uptime, will be available within the tool set.

5.1.6 Agent Based Management. The APM tool will have the ability to connect to agents on specific systems in order to report on specified metrics.

5.1.7 Agentless Management. The APM tool will have the ability to collect and report on systems (where applicable) without installing agents for the system.

5.1.8 Heterogenous Environments. The APM tool will be able to collect and report on systems based on heterogenous environments. This will include applications that are pure cloud systems, applications that are seen as hybrid cloud systems and applications hosted on premises.

5.1.9 It is also envisioned that the APM tool will work across security boundaries (such Active Directory (AD) forests and domains) in order to collect and report on metrics for systems that are outside the control of National DSD. This is a critical function for reporting on provincial systems.

5.1.10 Custom Thresholds. The APM tool should have the ability to create custom thresholds to be used for raising alerts based on specific thresholds.

5.1.11 Application Monitoring. The tool should have the ability to collect and report on common applications. Thresholds and alerts for known systems must be importable and available out of the box.

5.1.12 Reporting. It is envisioned that the tool will have out-of-the-box reports available, custom reports must all be available for administrators of the system to generate specific reports as and when required.

5.2 Non-Functional Requirements

5.2.1 Security. The APM tool must be secure, and must have full Role Based Access Controls (RBACs) available out-of-the-box. The ability to create custom roles is seen as mandatory requirement.

5.2.2 The APM tool must have the ability to create and safe custom credentials for specific applications that needs to be monitored in such a fashion that monitoring can be configured for systems that are not necessarily in the control of National DSD.

5.2.3 The APM tool must have the ability to manage shared secrets which will allow for the tool to monitor applications based on different Operating Systems. Credentials for common monitoring tools must be stored in such a manner that secrets are not exposed to malicious users or adversaries.

5.2.4 Knowledge Transfer. It is envisioned that a successful bidder will ensure that identified departmental administrators are provided with the necessary skills and knowledge to perform common day-to-day activities. Knowledge transfer will occur

during the implementation of the tool within the DSD environment. Knowledge transfer will occur on an informal manner and must not be confused with the formal training addressed latter in this document.

5.2.5 Training. A successful bidder will include formal training for 5 (five) identified DSD Administrative users. This training will be Instructor Led Training (ILT) and will be provided by a suitably qualified training institution. Where applicable a bidder will provide a list of qualifications that can be achieved for the APM tool and up to what level a DSD administrator will be trained.

5.2.6 Accreditation. The successful bidder will be required to provide a letter of accreditation from the OEM. It is required that the level of accreditation must outline the qualification requirements of that accreditation. The letter of accreditation must indicate the areas of accreditation that authorise the bidder to provide and support the proposed solution.

6 GENERAL REQUIREMENTS

6.1 The General Conditions of Contract (GCC) as prescribed by National Treasury (NT) will be applicable in all instances.

7 DISQUALIFYING CRITERIA

7.1 The following are seen as disqualifying criteria, which will result in a bidder's proposal not being evaluated:

7.1.1 Failure to submit a valid Tax Clearance Certificate;

7.1.2 Failure to complete and sign bid documents;

7.1.3 Scoring less than 65% in respect of functionality;

7.1.4 Late submission of the proposal;

7.1.5 Failure to attend the compulsory briefing session (if any has been arranged); and

7.1.6 Not complying with all the listed minimum business requirements criteria as listed.

8 DELIVERABLES/OUTPUTS

8.1 The following deliverables are expected from this project:

8.1.1 All analysis documentation. Including detailed URS(s) and FRS(s);

8.1.2 A fully functional APM tool that complies and conforms to the requirements as identified by the analysis phase of this project;

8.1.3 Detailed project management reports for the duration of the project;

8.1.4 A detailed Maintenance and Support SLA for a period of 36 months that will be entered into between the Service Provider (SP) and the DSD at the successful implementation and configuration of the APM tool; and

8.1.5 A detailed formal training plan for administrators.

9 TIMEFRAMES

9.1 Development and configuration is expected to take 12 months followed by maintenance and support;

9.2 Maintenance and Support phase – this phase will cover 36 months after the first two phases have been completed and will be backed by a detailed SLA.

10 BID PROPOSAL

10.1 The comprehensive proposal submission should include:

10.1.1 A detailed plan reflecting activity, project time frames, skills transference, costing and outputs;

10.1.2 Profile of company including a description of similar work undertaken;

10.1.3 Number, names and resumes (abbreviated CVs) of the person assigned to the project;

10.1.4 A summary of the roles, responsibilities and time spent by each Person;

10.1.5 The cost structure should be inclusive and as detailed as possible;

10.1.6 The service provider is expected to enter into a contract with the DSD based on the proposal; and

10.1.7 A work plan indicating time frames should be provided with the proposal. Progress will be monitored monthly based on the work plan and time frames provided by the service provider approved by the DSD.

11 PROPRIETARY RIGHTS

11.1 The following should be taken into consideration for rights transfers:

11.1.1 The DSD shall become the owner of source code that must be handed over to the Department after completion of the project, documents, advice and reports produced;

11.1.2 The copyrights of source code, all documents and reports compiled by the service provider will vest in the DSD and may not be reproduced, distributed or made available without the written consent and approval of the DSD; and

11.1.3 All information, documents and reports must be regarded as confidential until made public by the DSD.

12 EVALUATION CRITERIA

12.1 The evaluation of the bids will be conducted in two phases:

12.1.1 Firstly, the proposals will be evaluated on functionality. An evaluation panel will allocate points (scale 1-5) in respect of functionality according to the criteria set out in Table 12-1 below. Proposals scoring less than 65% in respect of functionality will be disqualified and not be evaluated further.

12.1.2 Thereafter, only the qualifying bids will be evaluated in terms of the 80/20 preference points system as contemplated in the Preference Procurement Regulations 2011 issued in terms of Preferential Procurement Policy Framework Act (Act 5 of 2000).

12.2 The 80 points will be used to calculate points for price only and 20 points will be used to calculate points for BBBEE status levels of contribution (SBD 6.1). Prospective service providers are required to complete the SBD 6.1.

12.3 The points in respect of price will be calculated on the ceiling price for the project (inclusive of the professional fees).

12.4 PLEASE NOTE: SBD 6.1 attached for claiming above-mentioned points, if not completed the bidder will automatically score 0 points.

12.5 Technical proposals will be evaluated on a scale of 1-5 in accordance with criteria in Table 12-1 below. The rating will be as follows:

- 1 – Very Poor;
- 2 – Poor;
- 3 – Average;
- 4 – Good; and
- 5 – Very Good

12.1 Evaluation Matrix

Table 12-1: Evaluation Matrix

No.	ELEMENT/CRITERIA	1	2	3	4	5	Weight	Total
1.	Demonstrate extensive knowledge and experience where the proposed solution has been successfully implemented with one or more reference/s attached. Those reference sites must be equal to or larger than the DSD's scope of requirements.						5	
2.	Provide proof of accreditation from the Original Equipment Manufacturer (OEM) indicating the partner status or level for the proposed tool. Provide summary resumes of prospective team members for the project with qualifications						5	
3.	Provide evidence that the tool proposed meets all functional requirements of the DSD as stipulated in section 5.1 of this document.						40	
4.	Provide evidence that the tool proposed meets all non-functional requirements of the DSD as stipulated in section 5.2 of this document.						40	
5	Provide a detailed implementation plan with time lines for the proposed implementation of the tool.						5	

No.	ELEMENT/CRITERIA	1	2	3	4	5	Weight	Total
6	Provide a detailed Service Level Agreement (non-binding) that demonstrates the support capability of the bidder for the proposed solution.						5	
	TOTAL						100	

13 FACILITIES TO BE PROVIDED BY THE DSD

13.1 During the project the DSD officials will make themselves available for clarity, reporting processes, discussions and meetings. The service provider will also have access to required documents, systems, infrastructure and other records available within the Department that may assist in executing the project.

14 REPORTING ARRANGEMENTS

14.1 All deliverables should be submitted to the DSD. Any deliverable submitted and not accepted must be reworked and resubmitted at no additional cost.

14.2 The service provider will provide a single overall project manager.

14.3 A comprehensive monthly report will be submitted by the service provider.

15 TARRIFS AND PAYMENTS

15.1 Payment will be affected within 30 days after receipt of a satisfactory detailed invoice from the successful service provider.

15.2 Payment will be made in accordance with the completion of work to the satisfaction of the DSD based on the milestone for the project agreed to and signed off as part of the implementation plan.

16 SPECIAL CONDITIONS OF THE CONTRACT

16.1 The Department will enter into a contract/ service level agreement with the successful/ appointed service provider.

16.2 The Department reserves the right not to appoint the service provider should it deem fit to do so.

16.3 The successful service provider will be required to undergo security clearance should the Department deem it necessary.

16.4 The successful service provider shall not cede the contract or any part thereof to any other person or third party. The successful/ appointed will therefore remain the sole responsibility agent for the project as a whole.

16.5 The department will furnish the successful/ appointed service provider with all the relevant information and available data within their possession that may be necessary for the service provider to perform duties.

16.6 All information, documents, and reports not currently in public domain and used during the development of the system or generated from the project must be regarded as confidential and may not be made available to any unauthorized person or institution without permission of the Accounting Officer or delegate.

16.7 The DSD will become the owner of all information, documents, reports and advice collected and compiled during the execution of the project.

16.8 Copyright of all documents and reports generated will vest in DSD and may not be reproduced, distributed or made available in any manner to public or third parties without written permission of the Accounting Officer or delegate.

17. SUBMISSIONS

- a) Prospective bidders must submit their bids proposals in **two envelopes**:
- b) **One envelope** with the **technical proposal** outlining in detail a realistic work-break schedule indicating different milestones to be achieved, and response to the terms of reference and evaluation criteria including other supportive documents, completed bid forms, tax clearance certificate issued by SARS and legal entity registration certificate.
- c) One **other envelope** with the **financial proposal** (pricing schedule (SDB 3.3) with all cost related items, cost breakdown).
- d) The entire proposal should be placed on disc in a PDF format.
- e) The following information must be endorsed on each envelope:
 - i. Bid number:
 - ii. Closing date:
 - iii. Name of the Bidder:
 - iv. Technical Proposal or financial Proposal
- f) **The closing date for the submission of bid is on 20 June 2022.**
- g) Failure to comply with these conditions will result in a bid being disqualified.
- h) The Bids should be:

Deposited in the Tender Box,
Foyer of the HSRC Building
134 Pretorius Street
Pretoria
- i) Bids received after closing date and time will be regarded as late and will not be evaluated

18. CONTACT PERSONS

18.1 Enquiries may be directed to:

Mr Z Mantantana

Email: ZolisaM@dsd.gov.za

Technical related enquiries may be directed to:

Ms M Nkhethoa

Email: MapasekaM@dsd.gov.za

NB: Please include both officials on any enquiry