

HEAD OFFICE
ETDP SETA House
2 - 6 New Street
Gandhi Square
South Marshalltown
Johannesburg CBD
Private Bag X105
Melville, 2109
Tel:(011) 372 3300

EASTERN CAPE
Waverley Office Park
3 - 33 Philip Frame Road
Chiselhurst
East London, 5200
Tel: (043) 726 8314
Fax: (043) 726 8302

FREE STATE
Sanlam Building
163 Nelson Mandela Dr
Bloemfontein, 9300
Tel: (051) 430 5072
Fax: (051) 430 5080

GAUTENG
Braampark Office Park
33 Hoofd Street
Forum 4, 2nd Floor
Braamfontein
Johannesburg, 2091
Tel: (011) 403 1301/2/3/6
Fax: (086) 614 8781

KWAZULU-NATAL
Durban Bay House
333 Anton Lembede Street
12th Floor, Suite 1203
Durban, 4001
Tel: (031) 304 5930
Fax: (031) 301 9313

LIMPOPO
Kwane Chambers
29 Hans van Rensburg Str
Office No: 01
Polokwane, 0700
Tel: (015) 295 9303
Fax: (015) 295 9301

MPUMALANGA
Streak Office Park
6 Streak Street
Block B, 1st Floor
Nelspruit, 1201
Tel: (087) 700 8113
Fax: (013) 752 2917

NORTHERN CAPE
Bobby's Walk Building
6A Long Street
Kimberley, 8300
Tel: (053) 832 0051/ 2
Fax: (053) 832 0047

NORTH WEST
Sparkling Office Park
78 Retief Cnr Peter
Mokaba Street
Potchefstroom, 2531
Tel: (018) 294 5280
Fax: (018) 294 5719

WESTERN CAPE
Sunbel Building
2 Old Paarl Road
Office 205, 2nd Floor
Belville, 7530
Tel: (021) 946 4022
Fax: (021) 946 4043



Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 82 - 2022/23

REQUEST FOR QUOTATIONS

TERMS OF REFERENCE FOR APPOINTMENT OF A SERVICE PROVIDER TO IMPLEMENT SHAREPOINT ONLINE AND SUPPORT THE MICROSOFT 365 PLATFORM

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 in order to benefit employers and employees in the ETD sector.

The **ETDP SETA reserves the right not to award the RFQ.**

2. PURPOSE AND OBJECTIVES

2.1. PURPOSE OF THE PROJECT

The ETDP SETA is looking for a suitably qualified service provider to configure and implement SharePoint online and support Microsoft 365 platform. The Service Provider is expected to configure, implement, support, and maintain SharePoint Online and Microsoft 365 platform.

2.2. OBJECTIVES

ETDP SETA seeks to implement SharePoint Online and support for Microsoft 365 platform to help the organization share and manage content, and knowledge to improve collaboration across business units in a secure manner.

3. OVERVIEW

The ETDP SETA comprises of 10 sites, a head office in Johannesburg and nine (9) provincial offices. Each office has one physical server which acts as a file and print server with the bulk of the data residing on the head office file server. ETDP SETA seeks to implement SharePoint online solution to provide a single central repository of all documents. Currently, ETDP SETA has the following in place:

1. *Microsoft Azure tenant with Activity Directory (AD) infrastructure linked to on-premises AD.*

2. *Microsoft Exchange Online.*
3. *Microsoft 365 A3 Licenses with the possibility to upgrade to A5.*
4. *Folder structure to be driven by ETDP SETA file plan to be provided to the bidders.*

4. PROJECT SCOPE AND REQUIREMENTS

4.1. Main Technical Requirements

The service provider shall submit a proposal that addresses the following main technical requirements

1. Development of the ETDP SETA Company Intranet
2. Electronic Document Management System
3. Building of workflows for internal submissions.

4.2. Detailed Technical Requirements

The service provider will be required to configure the following detailed technical and functional requirements:

4.2.1. Development of the ETDP SETA Company Intranet

- Migrate and implement ETDP SETA intranet to SharePoint Online. (currently deployed on Bootstrap 5 framework and supported by Javascript, php, and CSS).
- The landing page must have visible links to policies and procedures, publications and reports, news, notices and announcements, birthdays, and calendar.
- Daily, Weekly, or monthly reporting capability to track usage and adoption and audit reports.:
- Each business unit must have its own page or subsite with folders restricted to members, staff directory, and unit's public documents.

4.2.2. Electronic Document Management System

- Default access rights to be based on departmental units, divisional, or groupings as may be required.
- Individual folders with restricted access either through SharePoint Online or OneDrive.
- Version control.
- Migration of documents from file server to SharePoint online.
- Archiving of old data.

4.2.3. Building of workflows for internal submissions.

- Bidders will be required to implement the following a maximum of 10 workflows such as submission to CEO, expense claims, etc.
- Workflow notifications and reminders.

5. COSTING MODEL

NB: This costing model must not be modified at all and if retyped all line items must follow the format given in the table below. Any modification to this costing model will lead to disqualification.

DESCRIPTION OF SERVICES REQUIRED: OCCUPATIONAL QUALIFICATION DEVELOPMENT		
NAME OF SERVICE TO BE RENDERED: DEVELOPMENT OF LEARNING AND DEVELOPMENT PROFESSIONAL OCCUPATIONAL QUALIFICATION – Career Couch		
No	DELIVERABLES	COST ("R")
1.	Once-off setup costs covering all technical requirements	
2.	Virtual training for 150 users and champions	
3.	Post implementation SLA for 12 months with support and maintenance hours for SharePoint	
4.	Microsoft 365 platform up to 15 hours per month (payment will be based on used hours)	
VALUE ADDED TAX @ 15% (IF APPLICABLE)		
TOTAL COST (VAT INCLUSIVE)		
ALL COSTS MUST BE INCLUSIVE OF VAT, IF THE BUSINESS IS VAT REGISTERED		
	 Signature of bidder

6. DURATION OF THE AGREEMENT

The duration of the agreement will be **12 months** for support and maintenance after the signing of the Service Level Agreement (**SLA**).

7. 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

7.1. 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.

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

1. A valid Microsoft partner letter or certificate (with a clear indication of the validity period).
2. Declaration of Interest – **SBD 4 (New)**

7.2. STAGE 2 [Folder A (USB)]

The evaluation of this bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid documents.

- 7.2.1. The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
- 7.2.2. Only bids that achieved the minimum qualifying score 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 below:

NO	QUALIFYING CRITERIA FOR SHORT LISTING	POINTS
1.	<p>References: Company proof of conducting similar business within RSA and contactable references</p> <p>1.1. Contactable reference: (All references must be for companies within RSA and references should be on the referee's company letterhead) (15)</p> <ul style="list-style-type: none"> • 5 or more references = 15 • 4 references = 10 • 3 references = 5 • Less than 3 references = 0 <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) • duration of the project • recommendation and contact details of the referee as well as projects completed on time and • must be signed <p><i>NB: In the event of sub-contracting, the service provider must submit the above reference letters of the main contractor and the main contractor's certificate to the service provider indicating the service provider's involvement in the specific project(s).</i></p> <p><i>NB: If any of this information is omitted/missing will lead to the reference letter(s) being disqualified.</i></p>	15
2.	<p>Project Deliverables: A solution proposal detailing the work to be implemented as outlined in sections 4.1 and 4.2 above of the main technical and detailed technical requirements above. (60)</p> <p>2.1. Development of the ETDP SETA Company Intranet (20)</p> <ul style="list-style-type: none"> • Solution proposal addresses all 4 requirements = 20 • Solution proposal addresses all 3 requirements = 15 • Solution proposal addresses all 2 requirements = 10 • Below than 2 requirements = 0 <p>2.2. Electronic Document Management System (20)</p> <ul style="list-style-type: none"> • Solution proposal addresses all 5 requirements = 20 • Solution proposal addresses all 4 requirements = 15 • Solution proposal addresses all 3 requirements = 10 • Solution proposal addresses all 2 requirements = 5 	60

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	<ul style="list-style-type: none"> Below than 2 requirements = 0 <p>2.3. Building of workflows for internal submissions. (20)</p> <ul style="list-style-type: none"> Solution proposal addresses all 10 workflows = 20 <p>Below than 10 workflows = 0</p>	
3.	<p>3.1. Milestone project implementation plan. Bidder must submit milestone-based project implementation plan indicating delivery period as part of the bid (10).</p> <ul style="list-style-type: none"> Project implementation plan provided = 10 <p>No project implementation plan = 0</p>	10
4	<p>3.1 Relevant experience of Project Manager\Technical Lead in managing similar projects (Attach CV- the CV must clearly indicate the projects, date/period of implementation, names of clients and client contact details) (15)</p> <ul style="list-style-type: none"> 5 years and above = 15 4 - 5 years = 10 3 - 4 years = 5 Less than 3 years= 0 	15
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.

7.3. STAGE 3 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- 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**
- 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 |

The ETDP SETA shall allocate the specific goals as follows:

PREFERENCE GOAL	80/20	Documents for verification
GOAL 1 – Ownership		
Maximum Points	15	
Business owned by more than 50% black persons	8	ID copy of Director/Owner and CSD report
Business owned by less than 50% black persons	2	ID copy of Director/Owner and CSD report
Business owned by more than 50% black women	4	ID copy of Director/Owner and CSD report
Business owned by less than 50% black women	1	ID copy of Director/Owner and CSD report
Business owned by more than 50% youth	2	ID copy of Director/Owner and CSD report
Business owned by more than 50% disabled persons	1	Medical report /Certificate
GOAL 2 – Economic Reconstruction and Recovery Programmes		Documents for verification
Maximum Points	5	
SMME/QSE/EME/Cooperatives/NPCs/NPOs/CBOs	2	B-BBEE Certificate/Sworn Affidavit/Company registration documents
Promotion of business located in the province where goods and services are required	2	CSD and proof of municipal account /affidavit
Promotion of business located in South Africa	1	CSD and proof of municipal account /affidavit
TOTAL POINTS	20	

NB: Should a supplier not submit the below documents they will not be awarded points for that specific goal:

- **B-BBEE Certificate/ Sworn Affidavit**
- **ID copy of Director/Owner**
- **Latest CSD report**
- **Disability Medical report/Certificate**
- **Company registration documents**
- **Proof of municipal account**

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.

8. 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 or submitted by facsimile will **NOT** be accepted.
5. Bidders with a **turnover above R 10 million** must submit a valid certified B-BBEE Verification Certificate from **SANAS Accredited Verification Agency** in order to be used to verify eligibility for allocation of points for specific goals.
6. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less to be used to verify eligibility for allocation of points for specific goals.
7. A Qualifying Small Enterprise (QSE) is required to submit a sworn affidavit confirming their **annual total revenue of between R 10 million and R 50 million** and **level of black ownership** or a B-BBEE level verification certificate to be used to verify eligibility for allocation of points for specific goals.
8. Companies who bid as a joint venture must submit a **consolidated B-BBEE Verification certificate prepared for this bid only**, from **SANAS Accredited Verification Agency** in order to be used to verify eligibility for allocation of points for specific goals. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that no points will be allocated for specific goals.
10. Bids submitted are to hold good for a period of 90 days.
11. 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.
12. All suppliers must be registered on the **Central Supplier Database**. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier.
13. Companies that are in the process of **de-registration in the CIPC** will not be considered.

9. 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 RFQs as from **12h00 on 08 March 2023**.

Bidders must submit technical and financial proposals in **two separate USBs** clearly marked “**Folder A- Technical Proposal**” and “**Folder B- Financial Proposal**”.

Folder B - (Financial Proposal) must include the 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**, and B-BBEE certificate or sworn affidavit (*If claiming preferential points*) – **this will be used to verify points to be allocated for specific goals**

All Bids/Proposals (completed in [two separate USBs]) must be courier or hand delivered to:

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

OR

Sent via email to TienieJ@etdpseta.org.za or etdpsetarfq@etdpseta.org.za

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of 11h00 on **22 March 2023**.

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before 11h00 on **22 March 2023**.

11. 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: Email: TienieJ@etdpseta.org.za or SibusisoK@etdpseta.org.za

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