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Education, Training and Development Practices Sector Education and Training Authority

## RFQ NO: 72 - 2022/23 – RE-ADVERTISEMENT

### REQUEST FOR QUOTATIONS

#### TERMS OF REFERENCE FOR APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE PROFESSIONAL SERVICES TO INTEGRATE MICROSOFT DYNAMIC GREAT PLAINS WITH INFORMATION MANAGEMENT SYSTEM

#### 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

The ETDP SETA is looking for a suitably qualified and accredited service provider to build integration between Microsoft Dynamics GP and Information Management System (IMS).

#### 3. OVERVIEW

The ETDP SETA is in the process of developing and implementing an Information Management System (IMS). The system seeks to automate submissions of Annexure 2 Workplace Skills Plans and Reporting (WSPR), Education Training and Development Quality Assurance (ETDQA) processes, administration of skills development intervention and processing of mandatory grants that manages skills development. The system is cloud-based and runs on Odoo platform. It is required that the IMS system integrates with the ETDP SETA's financial management system (Microsoft Dynamics GP) for automated payment of Mandatory and Discretionary grants. Currently, the ETDP SETA finance system is hosted on-premises and is running on Microsoft Hyper-V as follows:

Host Server:	Microsoft Windows Server 2012 R2
Database server:	SQL Server 2014
Microsoft GP:	Version 2018

Database and Microsoft Dynamics GP are installed on the same server.

#### 4. SCOPE AND REQUIREMENTS

##### 4.1. Technical Requirements

The bidders are required to configure integration between the IMS system and Microsoft Dynamics GP as follows:

##### a) Mandatory grants.

- Processing of mandatory grants from IMS system to Microsoft Dynamics GP.
- Ensure that there is two-way communication between the two systems by providing feedback on transactions successfully or unsuccessfully posted.
- Processing of levy files from IMS system to Microsoft Dynamics GP through journals.

##### b) Discretionary grants.

- Linking purchase orders with projects created on the IMS system.
- Processing of discretionary grants payments from IMS system to Microsoft Dynamics GP.
- Ensure that there is two-way communication between the two systems by providing feedback on transactions successfully or unsuccessfully posted.

#### 5. 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**

##### 5.1. 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.***

##### 5.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION

1. The company must provide valid Microsoft partner letter or certificate (with a clear indication of the validity period).
2. A valid Microsoft Dynamics GP certificate for the technical lead person.
3. Declaration of Interest – **SBD 4 (New)**.

***NB: Failure to submit any of the above-requested mandatory documents will lead to disqualification.***

## **5.2. STAGE 2 [Folder A (USB)]**

In this stage, the evaluation of bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid document.

1. The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be eliminated.
2. Only bids that achieved the minimum qualifying score/ percentage 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 follows:*

NO	QUALIFYING CRITERIA FOR SHORT LISTING	POINTS
1.	<p><b>Experience &amp; References:</b> Company's proof of having successfully completed the deployment and configuration of Microsoft Dynamic GP in South Africa and contactable references.</p> <p><b>1.1. Experience:</b> Bidders must indicate projects where they have integrated Microsoft Dynamics GP with any other application and such proof must be contained on the referee's company letterhead with positive recommendation. All references must be for companies within RSA and references should be on the referee's company letterhead. A bidder must submit a minimum of three (3) reference letters <b>(30)</b></p> <ul style="list-style-type: none"> <li>○ 3 projects and above = 30</li> <li>○ 2 projects = 20</li> <li>○ 1 project = 10</li> </ul> <p><b>*[Each reference must clearly indicate;</b></p> <ul style="list-style-type: none"> <li>● the name of the bidder and the project</li> <li>● objectives of the project (nature of the project)</li> <li>● duration of the project</li> <li>● recommendation and contact details of the referee as well as proof of completed project(s) and must be signed</li> </ul>	<b>30</b>
2.	<p><b>Project Deliverables: 50</b></p> <p>2.1 A solution proposal detailing the work to be implemented against these terms of reference. The proposal should respond to all items listed in <b>section 4.1</b> of the terms of reference <b>(40)</b>.</p> <ul style="list-style-type: none"> <li>a. Grants &amp; Levies (20)</li> <li>b. Discretionary funds (20)</li> </ul> <p>2.2 <b>Milestone-based</b> project implementation plan indicating delivery period which should not exceed 3 months <b>(10)</b></p>	<b>50</b>
3.	<p><b>3.1 Experience of Project Manager</b> (Attach CV - the CV must clearly indicate the project management experience in systems implementation and respective clients with contactable references) <b>(10)</b></p> <ul style="list-style-type: none"> <li>○ 4 years and above = 10</li> <li>○ 2 - 3 years = 5</li> <li>○ Below 2 years = 0</li> </ul> <p><b>3.2 Experience of Lead Technical Person</b> (Attach CV - the CV must clearly indicate projects where they have implemented and integrated Microsoft Dynamic GP with any other system with contactable references. <b>(10)</b></p> <ul style="list-style-type: none"> <li>○ 3 projects and above = 10</li> </ul>	<b>20</b>

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	<ul style="list-style-type: none"> <li>○ 2 projects = 5</li> <li>○ 1 project = 0</li> </ul>	
<b>TOTAL</b>		<b>100</b>

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.

### 5.3. STAGE 3 [Folder B (USB)]

#### PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. 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**
- c. Invitation to Bid - **SBD1**
- d. 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	<b>80</b>
✓ Allocation of specific goals	<b>20</b>

The ETDP SETA shall allocate the specific goals as follows:

PREFERENCE GOAL	80/20	Documents for verification
<b>GOAL 1 – Ownership</b>		
<b>Maximum Points</b>	<b>15</b>	
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
<b>GOAL 2 – Economic Reconstruction and Recovery Programmes</b>		
<b>Maximum Points</b>	<b>5</b>	<b>Documents for verification</b>

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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
<b>TOTAL POINTS</b>	<b>20</b>	

**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 SCM policy on the appointment of service providers.

## 6. 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.

## 7. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: [www.etdpseta.org.za](http://www.etdpseta.org.za) Main Menu > Supply Chain Management > Open RFQs and will be sent to suppliers obtained from CSD as at **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](mailto:TienieJ@etdpseta.org.za) or [etdpsetarfq@etdpseta.org.za](mailto: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 **16 March 2023**.

**No late submission will be accepted!**

## 8. CLOSING DATE

All proposals should reach the ETDP SETA Offices on or before 11h00 on **16 March 2023**.

## 9. 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: [SibusisoK@etdpseta.org.za](mailto:SibusisoK@etdpseta.org.za) or [TienieJ@etdpseta.org.za](mailto:TienieJ@etdpseta.org.za)

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