

Invitation to Tender

Provision of a Cloud based Human Capital Management Suite, which includes Software as a Service (SaaS), Licensing, Implementation and Support

Tender Number: RFP/HC/LMS/2022/10

Date of Issue	12 September 2022	
Online Briefing Session Compulsory	19 September 2022	
Due Date	30 September 2022	
Method of Submission	Tender box, PPECB Main Reception	
Enquiries	Procurement Unit	E-mail: Siphokazir@ppecb.com
PPECB business hours	08:15 – 16:45	
Category	ICT	



PPECB

www.ppecb.com

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1 Invitation to Tender

Bidders are invited to tender for the Provision of a Cloud based Human Capital Management Suite, which includes Software as a Service (SaaS), licensing, implementation, and support to the Perishable Products Export Control Board (PPECB) excluding Payroll. The appointed service provider must have a physical presence within the Western Cape and must be able to service the PPECB nationally via an online platform similar to Microsoft Teams.

Bidders must comply with the instructions of all the requirements of this Invitation to Tender. Non-compliance may lead to a tender not being considered by the PPECB.

The contract term is five (5) years with an option to renew by further two (2) years based on satisfactory performance of the bidder.

2 PPECB Background

The PPECB is a Schedule 3A national public entity that is constituted and mandated in terms of the PPEC Act, No. 9, of 1983 to perform cold chain services. The PPECB also delivers inspection and food safety services as mandated by the Department of Agriculture, Land Reform and Rural Development under the APS Act, No.119 of 1990.

The PPECB's Executive Authority is the Minister of the Department of Agriculture, Land Reform and Rural Development who appoints the board members. The board comprises of representatives from the perishable product industries.

The PPECB employs ± 1 020 people, who deal with more than 200 products and 500 varieties. There are more than 50 service types, over 30 offices in 13 production regions, at more than 1,500 locations. A large percentage of staff are inspectors and therefore not office bound. In addition to these offices the PPECB also has several sub offices that operate on a seasonal or ad-hoc basis.

The PPECB, mandated by the Minister of the Department of Agriculture, Land Reform and Rural Development has been delivering end-point inspection services on perishable products destined for export since 1991. Inspectors stationed across the country; deliver inspection services on 200 product types at more than 1500 locations.

The PPECB is responsible for South Africa's cold chain management and ensures that products for export are handled, stored and transported at specific temperatures and optimum conditions.

One of the focus areas is that of digital transformation. TITAN 2.0® is the PPECB's electronic inspection platform which allows for integration with activity points. The next phase is full integration with e-Certification which will ultimately allow for a paperless certification process. A second strategic project is the process of replacing the PPECB's legacy information and financial system with a fully-fledged Enterprise Resource Planning (ERP) system which is Microsoft Dynamics 365.

Please visit the PPECB's website on www.ppecb.com for more information on the PPECB.

3 Tender Information and Instructions

The following terms shall have the following meanings:

Invitation to Tender:	Provision of a Cloud based Human Capital Management Suite, which includes Software as a Service (SaaS), Licensing, Implementation and Support
Contact Person:	The Procurement Office PPECB 45 Silwerboom Avenue Platteklouf 7500
Public Entity:	Perishable Products Export Control Board (PPECB)
Bidder:	The person / organisation submitting a tender bid to the PPECB under this tender.

The PPECB invites Bidders to submit a fixed price for the **Provision of a Cloud based Human Capital Management Suite, which includes Software as a Service (SaaS), Licensing, Implementation and Support** to the Perishable Products Export Control Board (PPECB) as outlined under technical specifications. Tenders are invited in accordance with the information in this pack.

Bidders are required to submit detailed proposals to demonstrate their ability to provide the services they will deliver on this RFP. A detailed specification of the services required by PPECB is contained herein.

The tender shall be submitted on the Forms of Tender incorporated herein. The form shall be signed by each Bidder and submitted in the manner and by the date and time stated below together with the documents listed duly completed.

Each Bidder should ensure that it is thoroughly familiar with the Tender Documents and understands the obligations that will apply if the Tender is accepted by the PPECB.

The tender submission and assessment process will be conducted in compliance with the relevant Supply Chain acts (including, Public Finance Management Act of 1999, Preferential Procurement Policy Framework Act of 2001, etc.), its associated Regulations, and PPECB's Procurement Policy. PPECB is committed to support and grow Black Economic Empowerment and Small Medium Enterprises in South Africa, emphasis being placed on procurement from historically disadvantaged South Africans.

Bidders shall highlight where a conflict of interest exists or may exist between parties under the proposed contract. In the event that a conflict of interest exists between the most advantageous Bidder and the PPECB, the said Bidder's bid will not be accepted. The next most advantageous Bidder will be awarded the contract.

The award of the tender is subject to receiving approval from the Bid Adjudication Committee of the PPECB and Board if applicable

It is the responsibility of each Bidder to obtain for itself at its own expense any additional information necessary for the preparation of the tender. This document and the information contained within it are for vendor use only, for the purposes of preparing a response to this RFP. The document is not to be duplicated and distributed, nor is its information to be disclosed to any third party without PPECB's written permission. Should Bidders believe that they require further information, they are invited to contact the Procurement Office (refer to contact details on page 3). Any queries relating to the Tender Documents should be sent in writing to the Procurement Office to arrive no later than ten (10) days before the date for submission of the tender. The Procurement Office may if necessary, issue written circulars to Bidders amending or clarifying the Tender Documents and Bidders shall comply with these.

All proposals are to be submitted in an envelope to the designated Tender Box. The envelope must be clearly marked *Provision of a Cloud based Human Capital Management Suite, which includes Software as a Service (SaaS), Licensing, Implementation and Support*. In addition, bidders must submit an electronic copy of their proposal in PDF format (except for Excel documents) via Microsoft OneDrive and shared with the email address Siphokazir@ppecb.com. **N.B.** Please submit the electronic copy in the same order as the physical submission (Individually filed in folders and numbered and named accordingly).

The PPECB will award the contract to qualified bidder(s) whose proposal is determined to be the most advantageous to the PPECB, taking into consideration the technical (functionality) solution, price and B-BBEE.

The tender will be evaluated in two stages according to the predetermined evaluation criteria (Refer to Point 10 for more detailed information). The two stages will consist of the following:

➤ **STAGE 1 – Technical and Functional Evaluation (Refer to closing date in the Timetable below)**

Stage 1 will be based on the technical and functional requirements of this tender. (**NOTE:** No Pricing is to be included with the Stage 1 submission). *Only bidders that successfully meet the criteria set out in Stage 1 will be invited to continue with Stage 2.* The Stage 1 submission (both paper and electronic) must consist of the following:

- List of returnable documents (Section 6)
- Technical Evaluation (Section 7 – Stage 1)
- Bidders must submit one (1) signed, completed original of the Technical Proposal
- Addendums A, B, C and D

➤ **STAGE 2 – Price and Preference Evaluation**

Bidders that have successfully met the evaluation criteria of Stage 1 above will be invited to continue with Stage 2.

RFP TIMETABLE

Timetable	Dates
RFP Issue Date	08 September 2022
Online Briefing Session(Non Compulsory)	19 September 2022
Stage 1 - Responses to be submitted (No Pricing in this submission)	30 September 2022 @ 11 am
Bid Evaluation	04 to 06 October 2022
Supplier Presentations	11 & 12 October 2022
Stage 2 – Discovery and Price and Preference	18 to 20 October 2022
BAC Approval	24 October 2022
Board Approval(If applicable)	23 November 2022

*These dates are subject to change at the discretion of PPECB.

Due-Diligence:

As part of the bid evaluation and assessing bidder's capabilities, the PPECB will be conducting due diligence on all parties specified in this tender including contacting external parties, a non-disclosure agreement will be issued by the PPECB. Please ensure that a signed Non – Disclosure Agreement (NDA) is submitted as per the criteria stipulated in Annexure F.

Briefing Session

The briefing session will be conducted Online via Microsoft Teams.

RSVP – If you intend to attend the briefing session, please RSVP to Siphokazir@ppecb.com at least two days before the session (Please ensure you use the Reference # **RFP/HC/LMS/2022/10**)

4 Scope of Terms of Reference

4.1 Project Background

The Human Capital strategy has defined the following factors to enable the business to meet the changing business environment:

- Identifying and providing the future skills required for the 4th Industrial Revolution
- Preparing employees to meet the needs of a changing client base, the effects of climate change, increasing technological disruption
- Preparing employees for a more client centric and purposeful culture

This will be driven via digitalization of processes, utilization of HR business intelligence, continuous improvement to ensure a human centred employee experience and future fit organisation. To this end an integrated Human Capital Suite is required.

All Human Capital administrative business processes are currently supported by Dynamics Navision Systems 5 and 13, CRS Payroll System, SumTotal Learning Management System, Deltek Silversoft Applicant Tracking System and SB Image Document Retention System. Some of the other key processes are supported by a different system or by 'shadow' systems such as standalone spreadsheets and databases.

The lack of interfaces between multiple and disparate systems, the inability of current systems to adapt and change with new demands, the absence of effective user-friendly data extraction and reporting tools have resulted in an array of a manual paper-driven, inefficient, and time-consuming business processes. This also poses a risk from an audit perspective with respect to recruitment, talent development and employee relations processes.

The PPECB is focused on building a resilient organisation that can respond to dynamic shifts in its business environment including the use of mobile devices for its workforce in accordance with its digital transformation strategy. An overview of the PPECB Digital Transformation Strategy incorporates the following:

Strategic Principles

- Adding value to clients
- Digitisation
- Innovation
- Transformation

Business objectives

- Introduce additional services and products that can add additional value
- Improve the employee and client experience by making systems and processes more user-friendly
- Introduce technology to improve efficiency
- Fully introduce a Human Capital Management Suite integration into Microsoft Dynamics 365 (D365)
- Provide a professional reporting functionality for internal and external, backed by proper market intelligence.
- Create self-service portals to enhance the overall employee and manager experience
- Provide mechanisms to innovate and to leverage technology
- Increase the reach of the PPECB to learn about new innovations and technology
- Create opportunities to collaborate and to address common challenges
- Provide a platform to share information, insights, ideas, expertise and knowledge
- Create new ways to address the needs of ecosystem members to address its needs and the needs of its clients
- Create the flexibility to bring on board new service offerings

To create value for our internal customers we need to do the following as a baseline:

- Availability of a single, modern system with user-friendly features (easy navigation, self-help menu, drop down boxes, drill down functionality, validation of data upon entry)
- Utilising a variety of productivity-enhancing features, such as single entry of data and reduction in manual processes, employee and manager self-service options, accessibility via the web or app on a workstation or mobile device and allow each user to customise their work environment by saving default settings based on the user's role.
- The Human Capital Solution must have full integration with all modules within the suite itself as well as the payroll solution and into the Microsoft D365 software which PPECB has chosen as its ERP to ensure electronic workflow functionality to allow for movement of documents between departments and electronic approval. Real-time, immediate update and access to HR data.

- Reduce reliance on ancillary systems, the re-keying of data, maintaining sidecar systems and the dumping of data into separate spreadsheets or database software for ad hoc reporting and managerial reports.
- User-friendly, user-driven, flexible and distributed print and reporting tools and integration with Microsoft Power BI as well as demand dashboards with distributed access to all users, making data available allowing for web-based queries and ad hoc reporting.
- Providing timely electronic distribution of reports and ease in developing customised ad hoc reports.
- Embedding policies and procedures into the system to reduce risk and improve audit compliance. This will greatly reduce dependency on policy and procedure manuals for knowledge transfer and provide a much more efficient means to handle knowledge retention, especially as experienced staff retire.
- The inclusion of automated approval workflows and any other workflows as required as per the PPECB policies.
- Workflows and authorisations that have built in audit trails to reduce risk for workforce management, recruitment, talent management, learning and development and employee relations.
- Streamlined business processes using established best business practices.
- Document management so that paper files are not maintained and should be auditable

PPECB has a centralised structure with many of its core business processes in Operations, Marketing and Communications, ICT, Human Resources, Finance and Procurement. The legacy systems installed over the past 16 years since the first implementation of Navision, were designed to support these processes and structures to meet their ongoing needs.

The project will replace legacy systems, with a single suite solution that applies the latest technology and best business practices to improve business efficiency and alignment to PPECB's strategy to rationalise, consolidate, simplification and standardisation. Functionalities and benefits include:

The initial, most significant benefit from a Human Capital System will be overcoming the weaknesses of existing systems and providing much-needed tools, integration and functionality for users of PPECB's Human Capital processes.

The Human Capital Suite is to include, amongst other capabilities, those listed in Addendum B: RFP Cloud Based Human Capital Suite Software – Functional system requirements.

4.2 Issues with the current portfolio

The key weaknesses identified from a systems perspective and key impacts of these weaknesses are summarised below.

- **Number of legacy systems not supporting business needs**

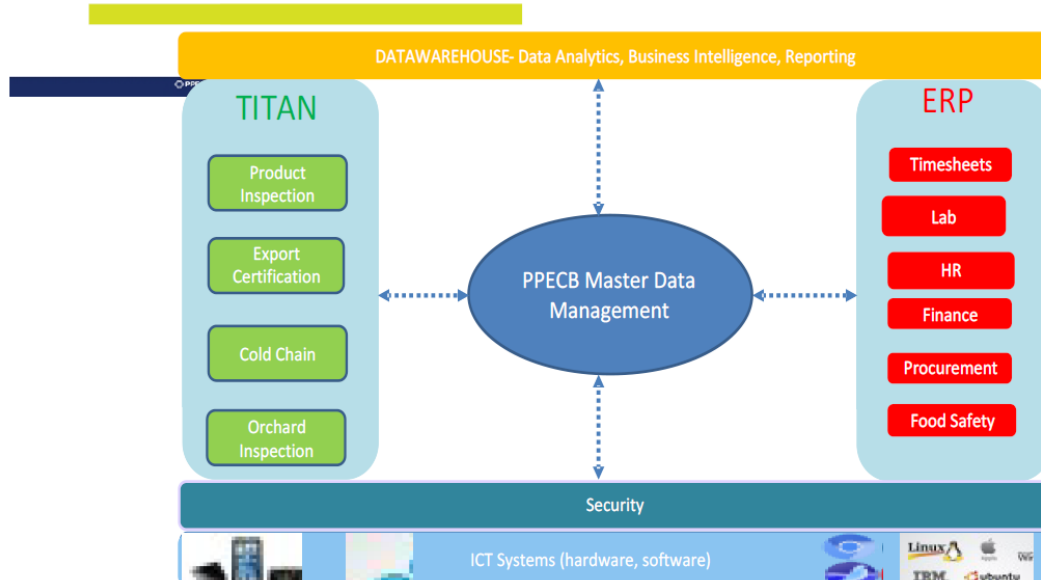
PPECB makes use of disparate systems, applications and servers for Human Capital, Operations. The major systems currently in use are Dynamics Navision 2005 and 2013, CRS Payroll, Deltek Silversoft Recruitment, Sumtotal Learning Management System and SB Image. PPECB will also be implementing Microsoft Dynamics 365 before the Human Capital Management Suite is implemented.

- **Lack of system integration and real-time information**

- Lack of integration between the current financial (Navision) and HR systems (CRS) results in some cases in manual intervention in the transfer of data between the systems.
- Many of the PPECB's business functions are supported by a series of independent systems, which results in inconsistent access to information.
- Data lacks timeliness, and therefore reliability, stemming from the inability to directly access the required systems and inflexibility in the extraction and reporting of information.

- Data that is transferred between the systems is predominantly at the aggregate level, forcing users to go to the primary system to obtain transaction detail.
- **Inefficiencies due to manual processes**
 - The existence of multiple standalone systems and reliance on desktop applications like Excel result in redundant data entry efforts
 - There are a host of manual processes that support certain business functions
 - Lack of online information querying capabilities and accessibility for staff
- **Reporting tools are substandard for PPECB needs**
 - The current systems lack sufficient data querying tools and management dashboards
 - Processes are not optimised and lack standardisation
 - Most non-standard reports requested by Management require intervention by the HC Department and/or manual development by staff.
 - AI is not being used as part of any of the systems

PPECB's TECHNOLOGY ARCHITECTURE



4.3 Technical Specifications

4.3.1 Scope of Services for The Human Capital Solution

PPECB requires proposals for the licensing, supply, implementation, and support of a relevant Cloud based Human Capital Solution Suite system on Software as a Service (SaaS) basis that will enable the organisation to improve workflow, process efficiencies, internal support, and service to its internal customers. The solution must integrate core business processes and facilitate consistent, integrated reporting with fewer resources. The system is required to replace legacy systems, with a single Human Capital Software solution that applies the latest technology and best business practices to improve business efficiency and alignment to PPECB's digital transformation strategy.

- Single sign-on integration with Microsoft Azure Active Directory (in accordance with the PPECB password policy)
- System must have a seamless user interface in order for the end user not to see differences between various modules/solutions on the front end
- Availability of a single, modern system with user-friendly features (easy navigation, self-help menu, drop down boxes, drill down functionality, validation of data upon entry)

- Utilising a variety of productivity enhancing features, such as single entry of data and reduction in manual processes, employee self-service options, accessibility via the web on a workstation and will allow each user to customise their work environment by saving default settings based on the user's role.
- Providing full integration between modules within the suite itself, payroll and D365 that gives electronic workflow functionality to allow for movement of documents between departments and electronic approval. Real-time, immediate update and access to HR data.
- Reduce reliance on ancillary systems, the re-keying of data, maintaining sidecar systems and the dumping of data into separate spread sheets or database software for ad hoc reporting and managerial reports.
- User-friendly, user-driven. Flexible, distributed print and reporting tools as well as on-demand dashboards with distributed access to all users based on user permissions, making data available allowing for web-based queries and ad hoc reporting.
- Providing timely automated electronic distribution of reports and ease in developing customised ad hoc reports.
- Embedding policies and procedures into the system that reduce risk and improve audit compliance.
- Streamlined business processes using established best business practices.
- Document management so that paper files are not maintained, and the document management component should be auditable
- Digital Signature capability for employee contractual agreements
- Mobility and accessibility on laptop, desktop, mobile and tablet
- Ability to work offline and sync information back once back online e.g. learning content
- Workflows and authorisations that have built in audit trails to reduce risk for workforce management, recruitment, talent management, learning and development and employee relations.
- In addition, workflows should be in place for the onboarding and exit management of employees with workflows to all departments involved in effectively onboarding and exiting an employee e.g. line managers, Human Capital and CyberSecurity.

The following pages specify the software requirements at a functional level, beyond those which are included with most Human Capital software offerings. Please respond to the requirements by inserting the appropriate number, as defined below, in the "Vendor Response" column, and add any supporting comments or documentation you deem relevant, regarding how your software will improve our processes.

Attached to this RFP is an Excel spreadsheet "**Addendum B: RFP Cloud Based Human Capital Suite Software – Functional system requirements.xls**" which details a number of requirements that must be addressed by the bidder's proposal. The Bidder is expected to complete the excel spreadsheet having followed the instructions below.

Bidders must replace cells D3:D4 in the first excel sheet (Introduction) with the Bidder's Company Name and solution name. The Priority column includes one of the following entries to indicate the importance of the specification/report to PPECB. Responses will be weighted accordingly:

"H" – High	An absolutely necessary feature to be gained from the new system. This would be either a feature that PPECB already has and uses in its current software, is available and/or tracked in a shadow system (i.e., spreadsheet, document, etc.) or has identified as a future critical requirement.
"M" – Medium	This would be a feature that, while of interest, is of medium priority at this time.
"L" – Low	This would be a feature that, while of interest, is of low priority at this time or something that could be a future deployment.

Each Bidder should review the specifications and reports listed in each subsection and respond as to their availability within the Bidder's software system. The responses should be entered under the "Availability" column of each form as follows:

Code	Description
Y	Functionality is provided out of the box through the completion of a task associated with a routine configurable area that includes, but is not limited to, user-defined fields, delivered or configurable workflows, alerts or notifications, standard import/export, table driven setups and standard reports with no changes. These configuration areas will not be affected by a future upgrade. The proposed services include implementation and training on this functionality, unless specifically excluded in the Statement of Work, as part of the deployment of the solution.
R	Functionality is provided through reports generated using proposed Reporting Tools.
T	Functionality is provided by proposed third party functionality (i.e., third party is defined as a separate software vendor from the primary software vendor). The pricing of all third-party products that provide this functionality MUST be included in the cost proposal.
M	Functionality is provided through customisation to the application, including creation of a new workflow or development of a custom interface that may have an impact on future upgradability.
F	Functionality is provided through a future general availability (GA) release that is scheduled to occur within 1 year of the proposal response.
N	Functionality is not provided.
N/A	Should Not Applicable (N/A) be indicated, please provide the reasons

It is important that the costing is reflective of the functionality requirements as set out in this section. Please ensure that the costing of the Bidder's proposed solution includes all modules and resources to satisfy these functional and technical requirements.

4.3.2 The following professional services are required:

Software as a Service (SaaS)

- The provision of a cloud based Human Capital Suite Solution
- A fully managed Cloud solution

Software Licensing

- Explanations of Software licensing in terms of:
 - Different licensing options
 - Types of user licensing
 - Enterprise licensing options
- The provision of software licenses for the abovementioned software and annual renewals for 5 years with an option to renew for a further 2 years.
- The licensing model must be able to provide consumption-based licensing due to large variations of seasonal workers (approx. 600 seasonal workers)

Number of Employees per month	2018		2019		2020		2021	
	Perm	Temp	Perm	Temp	Perm	Temp	Perm	Temp
January	472	191	477	182	501	161	536	148
February	471	181	477	227	501	176	534	152
March	474	217	480	272	502	286	538	198
April	473	360	481	436	504	321	538	340
May	478	480	489	529	531	496	536	475
June	479	479	489	531	530	511	535	514
July	478	477	490	527	533	510	537	508

August	479	466	488	507	535	476	537	495
September	478	393	492	410	535	393	537	449
October	476	229	501	173	536	175	536	229
November	476	186	499	142	535	155	535	181
December	477	197	497	162	535	172	535	208

Implementation

- The implementation of the solution needs to align to the PPECB's project governance framework i.e. existing committee's or approval structures to be utilised
- Transactional data conversion and migration
- Master data setup and migration
- Manage the implementation from the current system(s) to the proposed solution
- Reporting and analytical capability as stipulated in **Addendum C** (Reporting requirements)
- Installation and configuration of the Human Capital Suite including configuration of workflow across all modules
- The development of Business Requirement Specifications (BRS)
- To understand the Architectural Landscape and develop the Technical Design Specifications to deliver the Business Requirements
- Knowledge transfer and training services (Super / Full User Training and End User Training) in conjunction with the PPECB Learning and Development team, including assessments
- Knowledge transfer to the Application Support team to maintain and support the solution for general end user and application administration/support
- People Change Management (in conjunction with the PPECB Change Management team for the Human Capital Suite) – on a consultancy/advisory basis only
- Application packaging and rollout via Microsoft System Centre Configuration Manager (SCCM) and Microsoft Intune (for smart tablet users)
- The bidder to provide roll out plan for this system should they not provide the above(SCCM) and Microsoft Intune(for smart tablet users)
- System documentation and testing
- Configuration and system maintenance will be the sole responsibility of the service provider for the duration of the contract
- Migration of:
 - Existing learning material and audit trails of completion of learning
 - Competency data (Excel)
 - Recruitment applicant data, recruitment history
 - Performance management data (Excel)
 - Any enhancements and upgrades are to be effected by the service provider as part of the contract at no extra cost
- Post implementation support of all modules is to be 90 days. The commencement of the 90 days will only start after the full Human Capital Management Suite implementation (with the exception of support on the Learning Management Module which needs to be effected upon implementation of the module)

4.4 Proposed Implementation Plan

The Bidder is to provide an implementation plan in narrative format supported by an activity-level project plan using Microsoft Project (or similar) that details how the proposed solution is to be implemented. This implementation plan should include the following elements:

Item No.	Title
1.	General implementation approach
2.	Non-functional requirements
3.	Project management approach and methodology and the Microsoft Project Plan
4.	A fully managed Cloud solution
5.	Data conversion and migration (both transactional and master data)

Item No.	Title
6.	Reporting and analytical capability as stipulated in Addendum C (Reporting)
7.	Training services and knowledge transfer to the PPECB staff
8.	People change management
9.	System documentation, manuals
10.	Testing and simulations
11.	Process re-engineering assistance
12.	Other activities proposed by the Bidder

The Bidder should not be constrained to only include the above items in the proposal response, if the Bidder feels that additional elements may add value to the overall implementation. The PPECB requests that the Bidder provide their work plan in a Microsoft Project (or similar) format as part of the proposal response to be included in the Electronic Copy of the Technical Proposal.

It is expected that the Bidder will lead the efforts in each of the implementation areas described below, unless stated otherwise. Further details on what is to be provided as part of the Bidder's proposed implementation plan are included in the following subsections.

4.4.1 General Implementation Approach

Provide a general overview of the implementation approach you plan to use for the PPECB that includes addressing the following items:

- Provision of the Software
- Provision of Licensing
- Describe how you transition from the tender phase to the implementation phase of the project
- Describe how you transition from project implementation support to the Business as Usual (BAU) fully managed service maintenance support
- Describe key differentiators of the approach as it relates to implementing a solution on time, within budget and with the ability to meet the needs of a diverse client like the PPECB
- Describe how you would conclude on a preferred implementation phasing of software modules. What is your recommended approach for this implementation. Document major milestones so that these can be aligned to the PPECB budget and payment processes which form part of the overall PPECB programme plan
- A link to access the Human Capital Management Suite is to be placed on the PPECB Intranet site for ease of access for users (refer Addendum E)
- Describe your approach to System Development Life Cycle (SDLC).

4.4.2 Project Management Approach, Methodology and Governance

- Provide an overall description of the Bidder's project management approach towards this type of engagement and projected timing for major phases.
- The project plan submitted needs to start with the Learning Management System being implemented as the first module
- Describe your methodology for integrating your proposed Human Capital Management Suite with Microsoft Dynamics D365 and A Cloud based Payroll as specified by the PPECB. Please describe how the integration will happen between these technologies
- Provide an overall project governance framework
- Provide a high-level work plan for achieving the successful deployment of your proposed system
- The PPECB expects the Bidder to provide project management resources leading to the successful deployment of the system. This project manager will work as a team member with PPECB's project management team
- This project manager can be an employee of the Bidder. In either case, the costs for the project manager should be clearly denoted in the pricing section of the Price Proposal
- Provide a responsibility matrix including a resource plan for the number of resources and type of skills required across the various project phases from the PPECB e.g. numbers of UAT testers necessary per module

- The PPECB requests that the Bidder provide their work plan in a Microsoft Project (or similar) format as part of the proposal as well as provide the project governance framework.

4.4.3 Data Conversion and Migration Plan

- It is anticipated that data conversion (master data and transactional data) will occur when migrating to the new application
- The Bidder is expected to assist the PPECB in the conversion of both electronic and manual data to the new system
- It is expected that the PPECB will be responsible for data scrubbing and data pre-processing and that the Bidder will be responsible for the overall conversion co-ordination, definition of file layouts, and data import and validation into the Human Capital Suite. Please provide pricing for data conversions in the associated Microsoft Excel pricing spreadsheet to be submitted as part of the electronic copy of the Price Proposal
- Describe your general approach towards data conversion and how you would work with the PPECB and its current system providers to conclude on what should be converted
- Please describe your organisation's recommended approach toward retention of legacy data
- The PPECB will provide a secure location for data collection
- Please provide the process and tools that will be used for the data conversion in your proposal. The tools must be included as part of your implementation plan. The PPECB will not be responsible for the tools and the cost thereof. Only industry recognised tools will be accepted.

The Bidder is required to provide a costing estimate for converting and migrating 5 years' worth of historic transactions and master data.

4.4.4 Report Development using standard and user defined reporting

For specific reporting requirements, it is anticipated that the Bidder will take the lead on developing any reports required as part of the initial deployment of the system.

The Bidder is expected to provide specialised knowledge and information to the PPECB staff during the development of needed reports, via technical training on the tools used for report development, database schema and architecture, access control, etc.

Provide information on your reporting approach including the description of various methods of reporting.

Note: Based on the PPECB requirements, it is envisaged that the standard Human Capital Management reporting tool is sufficient to provide the reports required. Refer to and complete Addendum C (Reporting)

4.4.5 Knowledge Transfer and Training Services

A training environment is to be deployed for training to take place before Go-Live

The PPECB intends to explore the advantages, disadvantages and related costs of the implementation training approaches (required but not limited to the user groups listed below):

- ❖ **End User Training Approach:** All end-user training to be conducted remotely and a blended approach (on-site and remotely) if necessary.
 - End user implementation training will be provided by the Bidder and include joint participation by the relevant PPECB SMEs supporting the process area in the new software system; and
 - Implementation of training will include the transfer of knowledge to the PPECB Learning and Development Department
 - Assessments are required to be conducted via online platform similar to MS Teams.
 - Design and provide quick user guides / job aids / videos for end users – the guides / job aids / videos should preferably be online to be housed on the new Learning Management System and MS Teams, not necessarily hard copy
 - Number of permanent end users to undergo training – **556**, and the remaining temporary users with the bidder's assistance

- ❖ **Super / Full user and cyber security desk training:** The Vendor will incorporate a “train the trainer” approach where the PPECB cyber security desk staff will be trained through implementation on the modules. The Vendor will provide:
 - Training to super / full users for each module
 - Training materials to be used by super / full users for training of staff with the support of the bidder post implementation
 - Assessments are required to be conducted via online platform similar to MS Teams and for super / full users to train new staff in the future
 - The resources above should also remain available post implementation for the super / full users to train new team members and as a refresher to existing staff
 - Cyber Security desk staff are to be trained on user administration/support utilising the same methodology, including assessments
 - Cyber Security Desk staff - 4
 - Training modules are to include, but are not limited to:
 - Generic overview of the Human Capital Management Suite
 - Generic Employee self-service for applicable modules
 - Generic Manager self-service for applicable modules
 - Job Role specific (employee, manager, Human Capital staff, cyber security desk staff)
 - Simulation / online tutorial per job role after the initial roll out to be available for the PPECB Staff and Super / Full users to conduct training
 - Job aids – that stays with staff post training per job role – preferably online

The training material will remain the IP of the PPECB and shall remain with the PPECB post implementation. Refresher training to be provided as and when required for the duration of the contract together with super / full user. The Bidder must provide an overall description of training methods, including the following:

- General timeframes and duration per module implemented in which training will be conducted
- The Bidder must list the nature, level, and amount of training to be provided in each of the following areas:
 - ICT Support training
 - Functional super / full user training
 - End User training - operational areas
 - End User training - support areas and administrative staff
- The Bidder is to outline how the following issues will be dealt with during the training phase
 - Version control of material
 - Changes to training material – last minute changes due to e.g. configuration changes

Please note that a blended approach must be proposed and costed.

4.4.6 People Change Management Approach

The PPECB recognises that a movement from the current environment to a new solution will present change management challenges. The Bidder should clearly identify their approach towards Change Management including any unique approaches, processes, or tools that will be used.

The PPECB has a change management team for the Human Capital Management Suite implementation project and the Bidder needs to work alongside this team on a consultancy basis, i.e. a full time resource will not be required.

From the Bidder the role should be more on the technical side:

- Migrating from current systems to the Human Capital Suite
- Manual business processes to automated workflows;
- Updates regarding project progress, communication regarding challenges and the like should be communicated to the PPECB Project Manager and change management team for incorporation into the overall plan; and

- The change management plan and rollout will be aligned to the project milestones.
- Engagement and Adoption management

4.4.7 Technical System Documentation, Manuals and Testing

The Bidder is expected to provide technical documentation:

- Describe what technical documentation is available on the proposed system
- Describe what types of documentation you anticipate developing during the project.

It is the PPECB's expectation that the Bidder will develop test plans and test packs in collaboration with the PPECB resources and provide it to the PPECB. The testing is to incorporate both business and functional capabilities. The Bidder should also describe their recommended approach to the following types of testing that are anticipated to be performed on the project and the type of assistance they anticipate providing to the PPECB related to such testing:

- Unit Testing;
- Regression testing
- Functional Testing;
- System testing;
- System Integration testing (SIT) (in relation to the ERP modules and other systems);
- Stress/performance testing; and
- User acceptance testing (UAT) - Pilot/dress rehearsal/ simulation testing;
- Cloud Platform related testing
- Disaster Recovery Testing (DR)

Note: All testing as described above will be executed and managed by the service provider with the PPECB's support and sign-off by the product owner. The PPECB Business Analyst will liaise with product owners and provide the bidder with the required information.

4.4.8 Process Re-engineering Assistance

With the deployment of a new application, the PPECB wishes to take advantage of capabilities within Human Capital Management Suite that provides support for operational improvements. Bidders are requested to describe their approach towards process redesign including discussion on the optimal time in which to conduct redesign as it relates to implementation of the Human Capital Management Suite in conjunction with the PPECB's Business Analyst.

4.4.9 Other activities proposed by the Bidder

Details of additional elements that the Bidder feels may add value to the overall implementation. Please elaborate on your proposed approach, specifically relating to work within the existing Business Case Review, Business Benefits Realisation Plan, and co-creating the Change and Communication Plan.

4.4.10 Ongoing Support Services

The PPECB expects the support services listed below as a minimum. Please specify the nature and conditions of any post-implementation support options including:

There are **3 different types of support** which must be proposed and costed

- **Implementation Support** (when modules are implemented, support to address e.g. bug fixes)
- **90 day Post-Implementation support** (90 days of high care support **after all modules are implemented**)
- **Business as usual support** (e.g. system tuning, application configuration, interface issues, report development, network optimisation, user training and tips to optimise the user experience);
 - Limited number of users will utilise the below services:

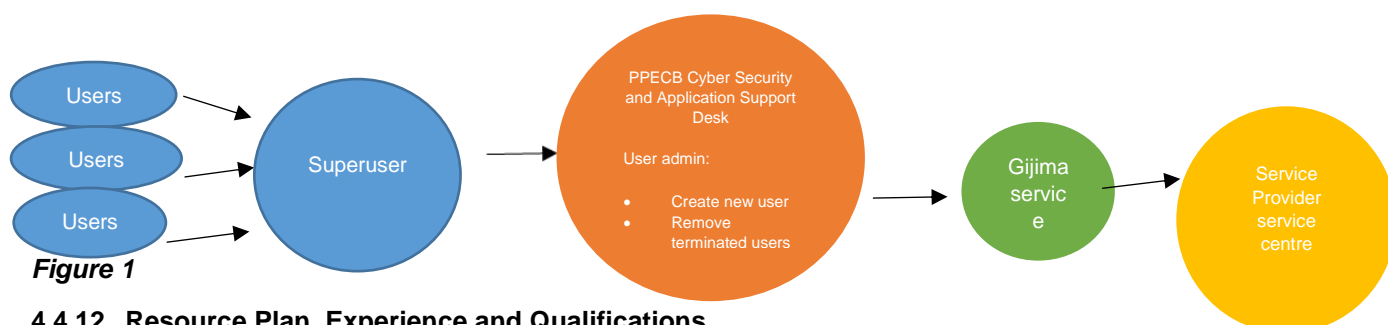
- Telephonic support and remote support (please provide detailed remote support licensing model (x6 Application support). The PPECB is licensed for SCCM and Team Viewer). Please price this separately.
 - Service Desk services – ITIL aligned (If there is a service level agreement for your help desk, please provide a copy with your RFP response)
 - Web Chat Services
 - PPECB support hours are deemed to be 7h00 to 18h00 which includes weekends and public holidays
- Business as Usual Support (normal SLA support, maintenance as a managed service, which starts after the 90 day post-implementation support finishes) requirements of which are listed below
 - PPECB office hours are deemed to be 7h00 to 18h00 which includes weekends and public holidays and the following requirements need to be costed
- Business as usual support of the Human Capital Management Suite as a managed service for a period of 5 years with an option to renew for a further 2 years

4.4.11 Business as Usual (BAU) Service Level Agreement (SLA) Required (N.B. no deviations on Priority 1)

Service Level Type	Time to Respond	Time to Resolve	Target for call resolution as measured against calls logged per month	Typical PPECB Description
Priority 1	1 hour	4 hours	99.99%	A global system issue that renders the application unavailable i.e. entire Human Capital Management Suite is down
Priority 2	2 hours	6 hours	99.95%	More than 1 module\aspect of the application that is unavailable or not performing as expected
Priority 3	3 hours	8 hours	99.90%	One module\aspect is unavailable or not performing as expected.
Priority 4	4 hours	10 hours	99.90%	System configuration incident resulting in a request. Outside the standard system functionality.
Priority 5	5 hours	12 hours	99.90%	General requests

➤ SLA and call logging

Gijima is the current Infrastructure Outsource Service Provider. Figure 1 below refers to the way calls will be logged with your Service Desk.



4.4.12 Resource Plan, Experience and Qualifications

The Bidder must detail the type and amount of implementation support to be provided (e.g. number of human resources, level of staff, time commitment, etc.).

An Organogram for the project must be included

The resources above need to be based in South Africa and travel to all offices will be at the bidder's cost.

Provide a **resource plan for resources number and type across the various project phases from the PPECB** e.g. numbers of UAT testers necessary per module

Please provide an **overall project and support delivery organisational structure for both PPECB and Bidder's staff involvement during the project** and contract term. Identify the roles and responsibilities of each component of this structure. This includes an appropriate governance structure in which to manage the project.

5 Requirements for Tender Submission

The tender and accompanying documents shall be carefully parcelled, sealed and be delivered to the Procurement Office no later than the closing date at 11H00. Failure to comply with these instructions may result in the tender being considered ineligible.

Written tenders will only be accepted in a sealed envelope or parcel which shall bear the words:

Tender: Provision of a Cloud based Human Capital Management Suite, which includes Software as a Service (SaaS), Licensing, Implementation and Support

Venue: THE PERISHABLE PRODUCTS EXPORT CONTROL BOARD (PPECB)

45 Silwerboom Avenue
Platteklouf
Cape Town, 7500

An electronic copy must be submitted online via Microsoft OneDrive and shared with email address Siphokazir@ppecb.com. No late tender shall be considered. Tenders will be opened in accordance with the relevant procedures.

6 List of Returnable Documents

The bidder must complete and submit the following returnable schedules:

Envelope 1: Technical Proposal

Refer to the Pre-qualification Requirements (Section 7 of this document)

- The bidder to confirm that:
 - a) The software proposed is a cloud consumption-based solution
 - b) The solution (software) can interface with Microsoft Dynamics 365 ERP
 - c) The solution will have the enterprise mobility capabilities (e.g. be functional on cell phones and tablets, etc)
 - d) They have done a cloud-based implementation of the proposed solution
 - e) They have implemented the proposed solution interfaced with external systems (which may be on premise or cloud based).
- The bidder must demonstrate experience in the implementation of the proposed software at a medium sized South African organisation (Employs more than 200 employees) in the last 5 years.
- Acceptance that the PPECB auditors will be allowed to audit your implementation & post go-live support and provide the PPECB's auditors with the information/evidence required.

Other Additional Documentation

Envelope 2: Pricing Proposal

- A) SBD 1 - Invitation to Bid

- B) SBD 4 - Bidder's Disclosure
- C) SBD 6.1 - Preference Point Claim Form
- D) Central Supplier Database Registration (CSD) Report – Proof of CSD registration
- E) Valid Tax Clearance Certificate or Pin
- F) Company / CC / Trust / Partnership registration certificates
- G) Valid B-BBEE certificate or EME/QSE Affidavit
- H) In case of proposal from a joint venture, consortium or subcontracting, the following must be submitted together with the proposal:
 - Joint Venture Agreement including split of work and rand value signed by both parties;
 - Valid copy of the B-BBEE certificate of the joint venture or consortium;
 - The Tax Clearance Certificate of each joint venture member;
 - Proof of ownership/shareholder certificates/copies of Identity document; and
 - Company registration certificates.

7 Technical Evaluation

The tender will be evaluated in two stages according to the predetermined evaluation criteria set out in below.

NOTE: DO NOT SUBMIT PRICING WITH YOUR INITIAL BID IN STAGE 1. Once bidders have successfully qualified to move onto Stage 2 pricing will be requested. Submission of any pricing in Stage 1 will invalidate your response to this tender and will be rejected.

STAGE 1 – TECHNICAL AND FUNCTIONAL EVALUATION

Stage 1 will be based on the technical and functional requirements of this tender. No pricing is to be received in Stage 1. The bidder will be evaluated according to the scoring criteria that has been set out in Stage 1A, Stage 1B, and Stage 1C below. Bidders that successfully meet the criteria in all of these stages and qualify after the evaluation of Stage 1C will be invited to continue with Stage 2.

a) STAGE 1A - Pre-qualification

- The bidders will be evaluated on the pre-qualification criteria.
- Bidders who do not meet these criteria's will not be evaluated further.

b) STAGE 1B - Technical, Functional & System Criteria

- The tender submission will be technically evaluated out of a maximum of 424 points based on the bidder's paper-based submission. A minimum threshold of 339 points out of the 424 has been set. Only bidders achieving 339 points minimum threshold and that meet the sub minimum thresholds will qualify to be evaluated for Stage 1C.

c) STAGE 1C - Supplier Presentation

- Shortlisted bidders will be required to present their proposed solution, technology and implementation plan including timelines and solution demonstration. A minimum threshold of 88 points out of the 110 has been set. Only bidders achieving 88 points minimum threshold and the subminimum thresholds will qualify to be evaluated for Stage 2.

STAGE 2 – PRICE AND PREFERENCE EVALUATION

Only bidders that have successfully met the evaluation criteria of Stage 1 above will be invited to continue with Stage 2.

a) STAGE 2A – Discovery Process and Information Gathering

Successful bidders will be invited to conduct due diligence and information gathering in order to provide firm pricing for this tender. The PPECB will collate and share information required in order for bidders to make an informed analysis to provide firm pricing. The same information will be shared to all bidders that will be participating during this stage. Bidders will be required to submit a signed Non-Disclosure Agreement (NDA) before any information will be shared.

Please note that Stage 2 allows for bidders to provide a firm quotation for this tender, it does not allow for any changes to be made to the technical and functional requirements you have provided in your proposal in Stage 1. Pricing submitted in Stage 2 must correlate to the technical and functional submission in Stage 1.

b) STAGE 2B – Price and Preference

- Once Stage 2A has concluded, bidders will be required to submit their pricing and will be further evaluated on B-BBEE and Price.
- *Should it be needed, the PPECB will invite bidders to conduct a presentation on their pricing*

Documentation that will be required from the bidder in Stage 2B:

1. SBD 3.3 - Pricing Schedule
2. SBD 7.2 - Contract Form: Rendering of Services
3. Addendum F – Detailed Pricing Schedule

c) STAGE 2C – Risk Evaluation

The PPECB will at its discretion conduct a risk analysis on the bids that have successfully made it through Stage 2B. The PPECB will evaluate the bids against the Objective Criteria as set out in Point 11 below.

Note: The PPECB reserves the right to appoint a Bidder other than the one that scored the highest points.

STAGE 1 – TECHNICAL AND FUNCTIONAL EVALUATION

Allocation of points on functional and technical evaluation will be to the criteria within the following framework:

➤ STAGE 1A – PRE-QUALIFICATION

The following is the pre-qualifying criteria that is applicable to this tender, any bidder who does not meet them will be disqualified and shall not be evaluated further.

No.	Qualification criteria	Supporting Documents Required	Reference page	Remarks
1	<p>The bidder to confirm that:</p> <p>a) The software proposed is a cloud consumption-based solution</p> <p>b) The solution (software) can interface with Microsoft Dynamics 365 ERP</p> <p>c) The solution will have the enterprise mobility capabilities (e.g. be functional on cell phones and tablets, etc)</p> <p>d) They have done a cloud-based implementation of the proposed solution</p> <p>e) They have implemented the proposed solution interfaced with</p>	<p>Confirm each item (Ab to E) in Qualification Criteria 1 separately in a letter from your company signed by a designated signatory</p>		

No.	Qualification criteria	Supporting Documents Required	Reference page	Remarks
	external systems (which may be on premise or cloud based).			
2	The bidder must demonstrate experience in the implementation of the proposed software at a medium sized South African organisation (Employs more than 200 employees) in the last 5 years.	Bidder is required to provide a minimum of three (3) detailed case studies where the software solution was successfully implemented in the last 5 years at a medium size South African organisation (Employs more than 200 employees)		
3	Acceptance that the PPECB auditors will be allowed to audit your implementation & post go-live support and provide the PPECB's auditors with the information/evidence required.	Confirmation of acceptance from your company signed by a designated signatory		

- **STAGE 1B – Technical, Functional & System Criteria Evaluation** (As outlined by the categories in Addendum A and the RFP document)

For each question asked in the RFP, the Bidders shall provide in their response, the question asked and their answer using the section numbering of the RFP. Attached to this RFP is an MS-Word “Addendum A HCM BID Response Document Technical Proposal”

For the purposes of scoring:

- **a comprehensive response explains how, by whom and by when items will be performed**
- **an overview explains that an item will be performed but the detail of how, who and when is not included**

No.	Technical Evaluation	Min. Points	Max. Points	Reference page in proposal
1	<p>Explanations of Software licensing in terms of: Section 4.3.2 of this RFP document and Section 4 Question 1 of Addendum A</p> <ul style="list-style-type: none"> • Different licensing options (20 points. No minimum threshold) <ul style="list-style-type: none"> ○ Comprehensive Software Licensing Model = 20 Points ○ Overview of the Software Licensing Model = 10 Points <p>The following items to be incorporated above:</p> <ul style="list-style-type: none"> ○ Types of user licensing ○ Enterprise licensing options 	10	20	
2	<p>Project Management Approach, Methodology and Governance (40 Points. Minimum threshold 15) Section 4.4.2 of this RFP document and Section 2 Question 13 of Addendum A</p> <ul style="list-style-type: none"> • Project Governance Framework (10 Points. No minimum threshold) • Work plan / Project Plan (10 Points. Minimum threshold 5) <ul style="list-style-type: none"> ○ Full Microsoft Project plan or equivalent for the entire project = 10 Points ○ A brief overview of the Microsoft Project plan or equivalent = 5 Points • Responsibility Matrix (10 Points. Minimum threshold 5) <ul style="list-style-type: none"> ○ Comprehensive responsibility matrix outlining all resources needed from a PPECB and bidder perspective for all phases of the project – 10 points ○ A brief overview of the resources required from PPECB and the bidder for the project as a whole – 5 Points • Post Certification Experience of the project manager in the management of projects of a similar nature, scope, size and scale in planning, installation, configuration and supporting of this solution (10 Points. Minimum threshold 5) <ul style="list-style-type: none"> ○ 5+ Years Post Certification Experience 10 Points ○ 3-5 Years Post Certification Experience 5 Points ○ 0-3 Years Post Certification Experience 0 Point 	30	40	
3	<p>Data Conversion and Migration Plan (35 Points. 25 minimum threshold) Section 4.4.3 of this RFP document</p>	25	35	

No.	Technical Evaluation	Min. Points	Max. Points	Reference page in proposal
	<ul style="list-style-type: none"> Data Conversion and Migration approach (20 Points. 15 minimum threshold) Retention of legacy data approach (15 Points. 10 minimum threshold) 			
4.	Ability to integrate and maintain Master Data within the solution and the PPECB landscape Section 9 Question 1 of Addendum A (40 Points. 20 minimum threshold) <ul style="list-style-type: none"> Comprehensive description of the ability to integrate and maintain Master Data within the solution and the PPECB landscape – (30 Points 15 minimum threshold) Overview of the ability to integrate and maintain Master Data within the solution and the PPECB landscape - 10 Points 5 minimum threshold) 	20	40	
5.	Report Development (10 Points. No minimum threshold) Section 4.4.4 of this RFP and Reporting Addendum C <ul style="list-style-type: none"> 100% of the reports in Addendum C has been met = 30 Points 80% of the reports in Addendum C has been met = 20 Points Below 80% of the reports in Addendum C has been met = 0 Points 	20	30	
6.	Knowledge Transfer and Training Services (50 Points. Minimum threshold 30) Section 4.4.5 of this RFP document <ul style="list-style-type: none"> End User Training (15 Points. 10 Minimum threshold) <ul style="list-style-type: none"> Comprehensive plan of end user training - 10 points, Overview of end user training - 5 points Cyber Security Desk Training (15 Points. 10 Minimum threshold) <ul style="list-style-type: none"> Comprehensive plan for Application Support Desk Training - 10 points Overview of Application Support Desk Training - 5 points Assessments (10 Points. 5 minimum threshold) User Guides / Job Aids (10 Points. 5 minimum threshold) 	30	50	
7.	People Change Management Approach (30 Points. 10 Minimum threshold 10) Section 4.4.6 of this RFP document <ul style="list-style-type: none"> Comprehensive Change Management Plan = 20 Points Overview of the Change Management approach = 10 Points 	10	30	
8.	Technical System, Documentation, Manuals and Testing (30 Points. 20 minimum threshold) Section 4.4.7 of this RFP document <ul style="list-style-type: none"> Comprehensive Testing Plan provided = 20 Points Overview of the Testing approach = 10 Points 	20	30	
9.	Process Re-engineering Assistance (15 Points. 5 minimum threshold) Section 4.4.8 of this RFP document Comprehensive description of the Process Re-engineering Approach = 10 Points Overview of your Process Re-engineering Approach = 5 Points	5	15	
10.	Company Background, Financial Position References <div> Company Background (55 Points. Minimum threshold 35) (Section 2 Questions 10 – 13 of Addendum A) </div>	80	125	

No.	Technical Evaluation	Min. Points	Max. Points	Reference page in proposal
	<ul style="list-style-type: none"> Support Staff based in South Africa (15 Points. 10 minimum threshold) Total number of implementation skills in South Africa (10 Points. 0 minimum threshold) Organogram of the implementation team (5 Points. 5 minimum threshold) Skills and certifications of implementation team (25 Points. Minimum threshold 20) <ul style="list-style-type: none"> C.V. and copies of the certification, where applicable to Project Manager and proposed solution mapped to the organogram above (15 Points) C.V.s and copies of the certification where applicable to Project Manager (10 Points) <p>Financial Position (30 Points. 20 Minimum threshold) (Section 2 Question 14 of Addendum A)</p> <ul style="list-style-type: none"> Submission of last Three (3) financial year audited financial statements (10 Points. 5 Minimum threshold) <ul style="list-style-type: none"> Last three (3) financial year audited financial statements (10 Points. 10 Minimum threshold) Less than (3) financial year audited financial statements (0 Points) Liquidity Ratio (5 Points. 5 minimum threshold) <ul style="list-style-type: none"> Liquidity Ratio of 1 or better (5 Points) Liquidity Ratio of less than 1 (2 Points) Solvency Ratio (5 Points. 0 minimum threshold) <ul style="list-style-type: none"> Solvency Ratio - 0.5 or better (5 Points) Solvency Ratio 0.49 or less (2 Points) <p>The bidder must ensure the financials are in ZAR-South Africa</p> <p>References (30 Points. 20 Minimum threshold) (Section 2 Question 4 and Section 3 of Addendum A)</p> <p>Please use the reference letter template in Addendum D</p> <ul style="list-style-type: none"> At least 3 contactable written reference letters signed by the client on the Addendum D template which speaks to: <ul style="list-style-type: none"> Implementation of the solution where it was in budget and / or on time Whether it was implemented for a whole organisation or for a division How many people within the organisation were affected by the implementation Not older than 5 years <p>3 Reference Letters meeting the criteria above = 20 Points 2 Reference Letters meeting the criteria above = 5 Points Less than 2 Reference Letters meeting the criteria above = 0 points</p> <p>All references need to be completed and signed by the third party (Bidders Client/service rendered to by the bidder)</p>			

No.	Technical Evaluation	Min. Points	Max. Points	Reference page in proposal
	<p>How many implementations of this software have you done? (10 Points. 5 minimum threshold) (Section 2, page 6 of Addendum A)</p> <ul style="list-style-type: none"> ○ 10 to 20 Implementations = 10 Points ○ 5 to 9 Implementations = 5 Points ○ Less than 5 Implementations = 0 Points 			
11.	<p>Application and Database Software (20 Points. 15 minimum threshold) (Section 4 of Addendum A)</p> <ul style="list-style-type: none"> • The Solution's Implementation Roadmap for major releases and upgrades, frequency of releases, significant functionality enhancements (20 Points. 15 minimum threshold) 	15	20	
12.	<p>Addendum B (Functional System Requirements)</p>	23	34	
13.	<p>Ongoing Support Services & Draft SLA including standard terms and conditions (85 Points. Minimum threshold 60) (Section 4.4.10 of this RFP document and Section 6 of Addendum A)</p> <ul style="list-style-type: none"> • Implementation support during the implementation of the various modules. (10 Points. 5 Minimum threshold) <ul style="list-style-type: none"> ○ Comprehensive implementation support plan during the implementation of the various modules (10 Points) ○ Overview of your implementation support during the implementation of the various modules (5 Points) • 90-day post implementation support to commence upon implementation of the full solution (10 Points. 5 Minimum threshold) <ul style="list-style-type: none"> ○ Comprehensive 90-day post implementation support plan to commence upon implementation of the full solution (10 Points) ○ Overview of your 90-day post implementation support to commence upon implementation of the full solution (5 Points) • Business as Usual Managed Service for 5 years commencing at the expiration of the 90-days above (10 Points. 5 Minimum threshold) <ul style="list-style-type: none"> ○ Comprehensive Business as Usual Managed Service plan for 5 years commencing at the expiration of the 90-days above (10 Points) ○ Overview of your Business as Usual Managed Service for 5 years commencing at the expiration of the 90-days above (5 Points) • Draft SLA matching the criteria in section 4.4.11 (10 Points. 5 Minimum threshold) <ul style="list-style-type: none"> ○ Draft SLA matching the criteria in section 4.4.11 with no deviations on Priority 1 calls (10 points) ○ Draft SLA matching the criteria in section 4.4.11 with deviations (5 points) • Provide a Business Continuity Plan that is specifically designed for your employees and company operations (to indicate how PPECB's systems and service levels will be safeguarded and supported) (25 Points. 20 minimum threshold) 	60	85	

No.	Technical Evaluation	Min. Points	Max. Points	Reference page in proposal
	<ul style="list-style-type: none"> Comprehensive business continuity plan 25 points Overview business continuity plan 20 points <ul style="list-style-type: none"> Describe the process to be followed to ensure integrity, classification and governance of master data sets for customers and vendors before migration onto the solution (confidentiality, integrity, availability) (10 Points. 5 Minimum threshold) <ul style="list-style-type: none"> Comprehensive plan detailing the integrity, classification and governance - 10 points Overview of the integrity, classification and governance - 5 points How do you support your existing clients while implementing with a new client? (5 Points. No minimum threshold) Describe how projects or resources are scheduled should there be more than one implementation at more than one client (5 Points. No minimum threshold) 			
14.	Software Updates and Distribution (10 Points. Minimum threshold 5) (Section 7 of Addendum A) <ul style="list-style-type: none"> Describe how upgrades and patching, as a whole, will be managed. Specifically, how any system upgrades and patching introduced by the software provider will be managed on an end-to-end basis by the Service Provider, including managing the upgrades and patches of configurations or customisations before distribution into the live client environment. <ul style="list-style-type: none"> Comprehensive description of how upgrades and patching, as a whole, will be managed (10 points) Overview of how upgrades and patching, as a whole, will be managed (5 points) 	5	10	
15.	Describe your company's Software Development Lifecycle (20 Points. 15 Minimum threshold) Section 8 Question 2 of Addendum A <ul style="list-style-type: none"> Comprehensive description of your company's Software Development Lifecycle - 15 points Overview of your company's Software Development Lifecycle - 5 points 	15	20	
16.	Configuration (15 Points.10 minimum threshold) (Section 8 of Addendum A) <ul style="list-style-type: none"> Demonstrate your Software Development Lifecycle this includes security by design principles being adopted (10 Points. No minimum threshold) Demonstrate your change management processes in accordance to ITIL (5 Points. No minimum threshold) 	10	15	
17.	Ability to Support and Integrate the Application Integration Requirements of the PPECB (20 Points.10 minimum threshold) (Section 10 of Addendum A)	10	20	

No.	Technical Evaluation	Min. Points	Max. Points	Reference page in proposal
	<ul style="list-style-type: none"> Describe your ability to support and integrate with the PPECB's primary data sources, targets, applications and other interface points. (10 Points) Describe how the modules integrate with each other and outline the overall application integration strategy with the PPECB third-party solutions, specifically the D365 ERP (10 Points) 			
18.	Risk Management (15 Points.10 minimum threshold) (Section 11 of Addendum A) <ul style="list-style-type: none"> What International Information Security standard certification(s) do you have? (e.g. ISO 27001 certification, Cyber Essentials certification, etc.) Please attach certification/s (5 Points. No minimum threshold) Bidder to demonstrate compliance with Data Protection legislation (i.e. POPIA) and best practice by explaining how data is processed, protected and retained by the organisation and how this would apply to the PPECB when rendering the required services: <ul style="list-style-type: none"> Bidders may either set out which policies, procedures or processes are currently in place or are being implemented by the organisation or submit the relevant policies and procedures as evidence. (10 Points. No minimum threshold) 	10	15	
	Total Points: A tenderer must obtain an overall minimum of 510 points to qualify for the short-list. (In addition to the sub minimum thresholds). To enable the PPECB to evaluate the entity on the above criteria, please ensure that adequate documentation is attached.	510	634	

The minimum required points for the bidder to be considered for Stage 1C (Presentations) is 495 points (in addition to the sub minimum thresholds). Any bidder that scores below the minimum threshold points of 495 points or does not meet the sub minimum thresholds will be regarded as non-responsive and therefore disqualified.

VERY IMPORTANT: Technical documents must be arranged in sequence of the above criteria in a pack with clearly marked sections according to the headings listed above.

The below criteria is for the purpose of confirming if requirements are met for HCM Suite Specifications:

Criteria No	System Specification Criteria	Minimum Thresholds	Points Allocated
1	Human Resources Management	40.00	75
1.1	Workforce Planning		5.00
1.2	Job Profiling & Job Evaluation		5.00
1.3	Employee Records Management		10.00
1.4	Recruitment		5.00
1.5	On-boarding		5.00
1.6	Performance Management		5.00
1.7	Learning & Development		5.00
1.8	Talent Management		5.00
1.9	Survey engagement		5.00
1.10	Exit Management		5.00
1.11	Compensation		5.00
1.12	Leave Management		5.00
1.13	Occupational Health & Safety		5.00
1.14	Employee Relations		5.00
2	Enterprise Mobility	10.00	20.00
Total points allocated for System Specifications			95.00

*The total score of the above will be weighted to 34 points with a minimum threshold of 23 Points (refer Section 12 in the evaluation criteria above). This equates to 70% of the functionality that must be achieved in Addendum B: RFP Cloud Based Human Capital Suite Software – Functional system requirements

VERY IMPORTANT: Technical documents must be arranged in sequence of the above criteria in a pack with clearly marked sections according to the headings listed above.

➤ STAGE 1C - Supplier Presentation

The PPECB will invite each vendor whose response passes the preliminary criteria to present their response to the evaluation team. The evaluation team will expect to be able to ask detailed questions, based on both the response and the presentation. Bidder presentations will be evaluated based on the below criteria.

Using the case studies you have provided (refer pre-qualification requirements above), provide an overview of the implementation according to the requirements below:

No.	Evaluation	Criteria	Maximum
1	Suppliers Presentation	Human Capital <ul style="list-style-type: none"> Workforce planning (from position tree to recruitment requisition) (5 Points) Recruitment Process (from recruitment requisition to acceptance of offer) (10 Points) 	35

No.	Evaluation	Criteria	Maximum
		<ul style="list-style-type: none"> Learning and Development (10 Points): <ul style="list-style-type: none"> - Training Administration *Must include: <ul style="list-style-type: none"> - PDP (Personal Development Plan) and training request management - Electronic Portfolio of Evidence - Attendance register management - Online Course Delivery *Must include: <ul style="list-style-type: none"> - Tests / assessments - Competency Management - Skills match and Skills-gap analysis - Instructional design software required Talent Management (10 Points): <ul style="list-style-type: none"> - Talent Review (Talent mapping; 9 Box Grid talent identification and readiness for critical positions; bench-strength) - Talent Matching - Retention planning 	
		Reporting <ul style="list-style-type: none"> Dashboards and standard reports (5 Points) Integration reporting from other systems/expense reporting running from financial system (headcount, leave and training) (5 Points) 	10
		ICT <ul style="list-style-type: none"> Demonstrate capability of system to utilise AI and machine learning; recruitment (5 Points) and Talent (5 Points) Cloud hosting model (5 Points) 	15
		Licensing <ul style="list-style-type: none"> A detailed breakdown of the licensing model 	10
		Flexible Workflows with regards to delegation of authority (include audit trails)	10
		Mobility Capabilities	10
		Single sign-on integration with Microsoft Active Directory	10
		Digital Signature capability for employee contractual agreements	10
Total Points - A bidder must obtain a minimum of 88 points to qualify for the short-list. To enable the PPECB to evaluate the entity on the above criteria, please ensure that adequate documentation is attached			110

STAGE 2 – PRICE AND PREFERENCE

➤ Stage 2A – Discovery Process and Information Gathering

Successful bidders will be invited to conduct due diligence and information gathering in order to provide firm pricing for this tender.

➤ Stage 2B – Price and Preference

The following preference point systems are applicable to all bids whereby points shall be awarded for Price; and B-BBEE Status Level of Contribution (Preference).

The lowest acceptable tender will be used to determine the applicable preference point system as per the Preferential Procurement Regulations of 2017 (80/20 or 90/10).

➤ Stage 2C – Risk Evaluation

The PPECB will at its discretion conduct a risk analysis on the bids that have successfully made it through Stage 2B. The PPECB will evaluate the bids against the Objective Criteria as set out in Point 11 below.

7.1 Objective Criteria

In terms of Preferential Procurement Regulation 11 and section 2(1)(f) of the Preferential Procurement Policy Framework Act, the PPECB may consider the following objective criteria in the bid award:

- 1) The risk of fruitless and wasteful expenditure to the PPECB;
- 2) The risk of an abnormally low bid; and
- 3) The risk of a material irregularity.
- 4) The PPECB reserve the right not to consider bids from Bidders who are currently in litigation with the PPECB.
- 5) The PPECB further reserve the right not to award this tender to any Bidder based on the proven poor record of accomplishment of the Bidder in previous projects within the PPECB and the referee submitted by the Bidder.

8 Financial Proposal

Points awarded for price

Note: Respondents are required to complete and return Addendum F – Pricing Schedule. The Bidder's Proposal must set out all pricing assumptions, including the applicable foreign currency exchange rates, applicable indices and the like.

The agreement will be based on variation-based agreement i.e. fixed unit costs will apply throughout the agreement lifecycle.

All prices must be inclusive of VAT. No variation, to the accepted quote, will be allowed unless the service provider has obtained prior written approval from PPECB. Quoted prices to be valid for **180 business days** and no variation to the accepted quote will be allowed.

Points awarded for B-BBEE status level of contribution

In terms of Regulations 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points will be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table as set out in the Preference Points Claim Form. Bidders must provide a valid BBBEE certificate.

8.1 Notes on Quantities and Pricing (NB: ONLY APPLICABLE TO STAGE 2)

- a) To facilitate like-for-like comparison bidders must submit pricing strictly in accordance with this pricing schedule (**Addendum G**) and not utilise a different format. Deviation from this pricing schedule will result in a bid being declared non-responsive.
- b) Please note that should you have offered a discounted price(s), PPECB will only consider such price discount(s) in the final evaluation stage if offered on an unconditional basis.
- c) Suppliers must provide firm prices in their proposals. For the purposes of this RFP “firm prices” are prices at which the Supplier will supply the Product and/or the Services to PPECB

without any adjustment thereto for any reason whatsoever, for the duration of agreement that PPECB may conclude with the Supplier, for the Proposal accepted by PPECB. PPECB will in this regard prefer that prices be **firm for a period of at least 12 (twelve) months**.

- d) Suppliers must submit a price schedule in which they set out the total cost breakdown of the prices they have quoted in their Proposals
- e) Please take note that the specified volumes are estimates and subject to change due to the seasonal resourcing fluctuations of the PPECB.
- f) Errors and omissions will not be accepted and only the total price submitted in your bid will be considered.
- g) To be left blank – failure to quote on all components will disqualify you from the tender process
- h) Please ensure that a detailed description accompanies the pricing schedule (**Addendum G**) that describes how the pricing has been derived

9 Special Conditions

- 9.1 PPECB reserves the right to reject any proposal found to be inadequate or non-compliant to the Scope of the Terms of Reference.
- 9.2 The Bidder may not intend to assign, in whole or in part, any of its obligations to perform in terms of the contract to any third party, unless disclosed and prior consent is obtained in writing.
- 9.3 A bidder may not intend to cede his right to payment in terms of a contract to a third party without prior written consent.
- 9.4 PPECB may reject bid if doesn't comply with the instruction of submission of the proposal referred to above
- 9.5 No tender will be awarded if the proposed solution does not meet the technical compliance criterion as set out above.

10 Joint Ventures, Consortiums and Trusts

A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, if the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. PPECB will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, with the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement. In addition, provide the following information:

- Entity(ies) that will be guaranteeing contract performance;
- Date of Joint Venture formation, if applicable;
- The name of the lead / prime contractor; and
- Details regarding the nature of the agreement between the Joint Venture Partners including the proposed percentage division of work between the constituent members. Each party to the RFP, if that party is a subsidiary company, is required to give details of the extent to which the holding company and related subsidiaries and associates are prepared to provide guarantees.

11 Quality

The quality of the products/services delivered shall not differ from that specified in Point 4 of this document.

12 Terms of Payment

The PPECB shall pay the Price to the appointed Bidder in accordance with the contract signed pursuant to the award of this tender, which payment shall be subject to:

- 12.1** the Price being in accordance with the agreed quotes and as per the contract;
- 12.2** the Products/Services being received and accepted by the PPECB in terms of the contract;
- 12.3** Goods and Services VAT being included in the Price.
- 12.4** A correct purchase order number being quoted on the tax invoice.

Payments terms of 30 Days from statement date.

13 Duration of Contract

- 13.1** This Contract and/or Service Level Agreement shall commence on the Commencement Date and terminate after a period of five (5) years with an option to renew for a further period of two (2) years, subject to early termination hereof, or termination due to breach of contract. The duration of the Agreement shall be subject to an annual performance review by the PPECB, which shall entitle the PPECB to cancel this Agreement if the performance of the Services do not meet the required agreed performance standards.

The PPECB reserves the right to terminate without penalty if the successful tenderer is not able to honour the terms and conditions specified by the contract. Further to this, should there be any risk in terms of reputational damage by association the PPECB reserves the right to cancel the contract.

14 General Terms and Conditions

Confidentiality

Some of the information contained in the Tender Documents may be of a confidential nature and must only be used for purposes of responding to this RFP. This confidentiality clause extends to bidder partners whom you may decide to involve in preparing a response to this RFP.

For purposes of this process, the term "Confidential Information" shall include all technical and business information, including, without limiting the generality of the foregoing, all secret knowledge and information (including any and all financial, commercial, market, technical, functional and scientific information, and information relating to a party's strategic objectives and planning and its past, present and future research and development), technical, functional and scientific requirements and specifications, data concerning business relationships, demonstrations, processes, machinery, know-how, architectural information, information contained in a party's software and associated material and documentation, plans, designs and drawings and all material of whatever description, whether subject to or protected by copyright, patent or trademark, registered or un-registered, or otherwise disclosed or communicated before or after the date of this process.

The receiving party shall not, during the period of validity of this process, or at any time thereafter, use or disclose, directly or indirectly, the confidential information of PPECB (even if received before the date of this process) to any person whether in the employment of the receiving party or not, who does not take part in the performance of this process.

The receiving party shall take all such steps as may be reasonably necessary to prevent PPECB's confidential information coming into the possession of unauthorized third parties. In protecting the receiving party's confidential information, PPECB shall use the same degree of care, but no less than a reasonable degree of care, to prevent the unauthorized use or disclosure of the confidential information as the receiving party uses to protect its own confidential information.

Any documentation, software or records relating to confidential information of PPECB, which comes into the possession of the receiving party during the period of validity of this process or at any time thereafter or which has so come into its possession before the period of validity of this process:

- shall be deemed to form part of the confidential information of PPECB,
- shall be deemed to be the property of PPECB;
- shall not be copied, reproduced, published or circulated by the receiving party unless and to the extent that such copying is necessary for the performance of this process and all other processes as contemplated in; and shall be surrendered to PPECB on demand, and in any event on the termination of the investigations and negotiations, and the receiving party shall not retain any extracts thereof.

Data Protection

The bidder herewith consents to the processing of its Personal Information, as defined in the Protection of Personal Information Act 4 of 2013 and any other applicable data protection legislation, for the purposes of the evaluation, adjudication and appointment of a successful bidder. Where applicable, the bidder warrants that it has obtained the necessary consent to process any personal information of its employees and/or any third parties whose personal information is provided for this bid. The bidder consents that PPECB may verify personal information, where necessary, with the National Treasury CSD website and any other regulatory/ industry or any accredited/certification bodies. Should the bidder wish to withdraw its consent as discussed above at any time, it must do so in writing and address such notification to the Procurement Manager of the PPECB. The personal information collected for the purpose of this bid will be retained for a period of three years after the bid has been awarded. The personal information of the successful bidder must be retained in accordance with the PPECB's document retention policy.

Any personal information and Confidential Information of the PPECB which may be provided during the bidding process may only be processed by the bidder for the purposes of this bid.

News and press releases

Bidders or their agents shall not make any news releases concerning this RFP or the awarding of the same or any resulting agreement(s) without the consent of, and then only in co-ordination with PPECB.

General legal conditions

The laws of the Republic of South Africa shall govern this RFP and any subsequent agreement entered into. Bidders accept hereby that the courts of the Republic of South Africa shall have jurisdiction.

PPECB shall not be liable for any costs incurred by the Bidder in the preparation of response to this RFP. The preparation of response will be made without obligation to acquire any of the items included in any Bidder's proposal or to select any proposal, or to discuss the reasons why such Bidder's or any other proposal was accepted or rejected.

PPECB may request written clarification, documentary evidence or further information regarding any aspect of this proposal. The Bidder must supply the requested information in writing within the time frames stipulated by the PPECB, otherwise the proposal may be disqualified.

By submitting a proposal in response to this RFP, the Bidder accepts the evaluation criteria as it stands.

Should the Bidder withdraw the proposal before the proposal validity period expires, PPECB reserves the right to recover any additional expense incurred by PPECB having to accept any less favourable proposal or the additional expenditure incurred by PPECB in the preparation of a new RFP and by the subsequent acceptance of any less favourable proposal.

Any amendment or change of any nature made to this RFP or the Tender Documents shall only be of force and effect if it is in writing, signed by a PPECB authorized signatory and added to this RFP as an addendum.

PPECB will not be held liable for any expenses incurred by Bidders, in preparing and submitting the proposal.

In the evaluation of proposal, PPECB reserves the right to conduct independent reference checks. Should the evaluation of the proposals not be completed within the validity period, PPECB has discretion to extend the validity period. Upon receipt of the request to extend the validity period of the bid, the Bidder must respond within the required timeframes and in writing on whether or not it agrees to hold its original proposal responses valid under the same terms and conditions for a further period.

All Bidders must make full disclosure of any potential conflict of interests. PPECB will make the final determination as to whether the potential conflict of interest precludes the award of the tender to the Bidder.

While information in this RFP document has been prepared in good faith, it does not purport to be totally comprehensive, nor to have been independently verified. PPECB does not accept any liability for its adequacy, accuracy or completeness, nor does it make representation or warranties with respect to information contained in it, or upon which the RFP is based.

Prior to submitting the proposal, Bidders should satisfy themselves of the accuracy and completeness of all the information submitted. Bidders should be confident that the pricing submitted is sufficient for the company to meet all its obligations in terms of this RFP document and any contract that may result from this RFP process. Failure to do so may lead to disqualification.

Please note that a potential bidder must have a B-BBEE certificate that has been issued by a verification agency accredited by the South African Accreditation System (SANAS) or the bidder must submit an affidavit stating its B-BBEE status level. Exempt Micro Enterprises (EME's) must acquire an affidavit regarding their B-BBEE status level - no verification is required. This is also applicable to Qualifying Small Enterprises (QSE's) with 51% or more black ownership.

15 Disclaimer

This RFP is a request for proposals only and not an offer document; answers to it must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, bidders shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. The PPECB makes no representation, warranty, assurance, guarantee or endorsements to bidder concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the PPECB shall have no liability towards the bidder or any other party in connection therewith.