

BID TITLE	SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM
BID NUMBER	FAIS2023/24 - T001
DATE ISSUED	Tuesday, 25 July 2023
CLOSING DATE	Friday, 25 August 2023
CLOSING TIME	11h00 (South African Standard Time, obtained from Telkom SA SOC Limited by dialling 1026)
PHYSICAL ADDRESS	Menlyn Central Office Building, 11th Floor 125 Dallas Avenue, Waterkloof Glen, Pretoria, 0010
POSTAL ADDRESS	P O Box 41, Menlyn Park, 0063
WEBSITE	www.faisombud.co.za
TO BE COMPLETED BY THE BIDDER	
BIDDER'S NAME	
TELEPHONE NUMBER	
EMAIL ADDRESS	
NAME OF BIDDERS REPRESENTATIVE	
SUPPLIER NUMBER AS PER THE CENTRAL SUPPLIER DATABASE (CSD) REPORT: MAAA	
POSITION OCCUPIED IN THE COMPANY (DIRECTOR, TRUSTEE, SHAREHOLDER)	
COMPANY REGISTRATION NUMBER	

ENQUIRIES RELATING TO THE TENDER	
EMAIL	tenders@faisombud.co.za

A.	INTRODUCTION TO TENDER.....	4
1.	Introduction	4
2.	Briefing session.....	4
3.	Bid enquiries and questions.....	5
4.	Tender submission	5
5.	Pricing schedule	6
B.	DEFINITIONS	7
6.	Definitions	7
C.	TENDER RULES	8
7.	Capabilities and experience of bidders.....	8
8.	Form of tender.....	8
9.	Signing of bid.....	8
10.	Bid all inclusive.....	8
11.	Alterations to bid documents	8
12.	Qualifications on tender	8
13.	FAIS Ombud's rights.....	8
14.	Undertaking by bidder	9
15.	Central supplier database.....	10
16.	Supplier performance management	10
17.	Cancellation of contract.....	10
18.	Applicable laws.....	11
19.	Reasons for disqualification of bid	12
20.	Delegation of authority	12
21.	Bid rules are binding.....	12
22.	Language of contract	12
D.	TERMS OF REFERENCE	13
23.	Objectives.....	13
24.	Background.....	13
25.	Purpose of the request for bid.....	13
26.	Scope of work.....	14
27.	Contract conditions.....	16
28.	Project timeline	16
29.	Bid evaluation	17
30.	Functional evaluation (Desktop).....	18
31.	Functional evaluation (Presentation)	21

32.	Preference point system.....	22
33.	Additional information required	23
34.	Timeline of the bid process	24
E.	STANDARD BIDDING DOCUMENTS	25
F.	ADMINISTRATIVE CHECKLIST	35

A. INTRODUCTION TO TENDER

1. Introduction

- 1.1 The Office of the Ombud for Financial Services Providers (FAIS Ombud) was established by the Financial Advisory and Intermediary Services Act 37 of 2002. The FAIS Ombud's role is to resolve disputes between financial services providers and their clients in a procedurally fair, informal, economical and expeditious manner and by reference to what is equitable in all circumstances.
- 1.2 The mission of the FAIS Ombud is to promote consumer protection and contribute to the integrity of the financial services industry by resolving complaints in a manner that is impartial, expeditious, economical, accessible and, all times, equitable. Visit the FAIS Ombud website, www.faisombud.co.za for further information about the FAIS Ombud.
- 1.3 The FAIS Ombud office is located in the East of Pretoria in Gauteng at Menlyn Central Office Building, 125 Dallas Avenue, Waterkloof Glen, Pretoria 0010
- 1.4 This tender is subject to the Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2022, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. Where, however, the special conditions of the contract are in conflict with the general conditions of the contract, the special conditions of contract prevail.
- 1.5 All information, including personal information collected during this process will be treated as confidential, and processed in line with the FAIS Ombud Protection of Personal Information Policy.
- 1.6 Bidders are hereby invited for the appointment of a service provider to provide support and maintenance including software licenses on the CRM Microsoft Dynamic 365 system for a period of three years.

2. Briefing session

- 2.1 There will be no briefing session

ISSUE DATE			PAGE 4 OF 36
TITLE	FAIS202324-T001 [SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM]	INITIAL HERE →	BIDDER'S INITIALS

3. Bid enquiries and questions

- 3.1 All questions relating to the contents of the tender (conditions, rules, terms of reference etc.) must be forwarded in writing via email to tenders@faisombud.co.za by not later than 10 August 2023. Questions received after this date will not be entertained.
- 3.2 All questions must reference specific paragraph numbers, where applicable.
- 3.3 All enquiries (received on or before the closing date for enquiries) will be consolidated and will be published as one response document on the FAIS Ombud website (www.faisombud.co.za) within three working days.
- 3.4 No requests for information shall be made to any other person or place and in particular not to the existing provider of this service.

4. Tender submission

- 4.1 Bid documents may be placed in the tender box or couriered to the physical address. Bids submitted by means of e-mail, telegram, telex facsimile, electronic or similar means shall not be considered.
- 4.2 Completed documents with supporting annexures shall be packaged, sealed, clearly marked, and submitted strictly as follows:

Bid No	FAIS2023/24-T001
Bid Name	Support and maintenance of CRM Microsoft Dynamic 365 system

- 4.3 The FAIS Ombud requires two printed copies (one original and one copy plus one electronic copy in electronic storage media, preferably a CD or flash drive/memory stick) in PDF format all bound in a sealed envelope marked as stated in paragraph 4.2.
- 4.4 Bids must be properly packaged and deposited on or before the closing date and before the closing time in the tender box situated at the reception area of the FAIS Ombud. The bidder must sign the tender register before depositing the bid document in the tender box. The physical address of the FAIS Ombud is as follows:

Menlyn Central Office Building,
125 Dallas Avenue,
Waterkloof Glen,
Pretoria
0010

- 4.5 Bid documents will only be considered if received by the FAIS Ombud on/or before the closing date and time, regardless of the method used to send or deliver such documents to the FAIS Ombud.

4.6 **Late submissions will not be accepted.**

4.7 Bidders must initial each page of the bid document on the bottom right hand corner.

5. Pricing schedule

5.1 Only fixed prices will be accepted.

5.2 The pricing schedule must be submitted as part of the bid proposal.

B. DEFINITIONS

6. Definitions

6.1 Unless inconsistent with or expressly indicated otherwise by the context.

6.1.1 **FAIS Ombud** shall mean the Office of the Ombud for Financial Services Providers.

6.1.2 **Contractor** shall mean the tenderer whose tender has been accepted by the FAIS Ombud and shall include the tenderer's personal representatives, also referred to as the successful bidder.

6.1.3 **Contract** shall include the General Conditions of Contract and Special Conditions of Contract, the specifications including any schedules attached to the specifications, and any agreement entered into in terms of these Special Conditions of Contract.

6.1.4 **Service** shall mean support and maintenance including software licenses on the CRM Microsoft Dynamic 365 system for a period of 36 months.

6.1.5 **Person** includes any company incorporated or registered as such under any law, any body of persons corporate or unincorporated, any trust. Person, firm or company shall include an authorised employee or agent of such person.

6.2 Except where the context indicates otherwise, in this document the singular includes the plural, and with reference to gender, the one includes the other.

C. TENDER RULES

7. Capabilities and experience of bidders

- 7.1 Bidders are required to provide all information as necessary to demonstrate their capabilities and experience with regard to the requested services.

8. Form of tender

- 8.1 The bid shall be signed and witnessed on the form of bid incorporated herein. The schedule of services shall be fully priced in South African Rand to show the total amount of the bid and shall be signed. The certificates, schedules and forms contained in this document shall be completed and signed by the bidder in blue or black ink.
- 8.2 Where the space provided in the bound document is insufficient, separate schedules may be drawn up in accordance with the prescribed formats. These schedules shall be bound with a suitable contents page and submitted with the tender documents.

9. Signing of bid

- 9.1 The bid must be signed by a person who is duly authorised to do so.

10. Bid all inclusive

- 10.1 The bidder must provide an all-inclusive fee statement in the bid.

11. Alterations to bid documents

- 11.1 No unauthorised alteration or addition shall be made to the form of bid, to the schedule of quantities of services to be rendered or to any other part of the bid documents. If any such alteration or addition is made or if the schedule of quantities of services to be rendered, or other schedules or certificates are not properly completed, such submission may be disqualified.

12. Qualifications on tender

- 12.1 Bids submitted in accordance with this bid document shall be without any qualifications.

13. FAIS Ombud's rights

- 13.1 The FAIS Ombud is entitled to amend any bid conditions, bid validity period, tender specifications, or extend the bid's closing date, all before the bid closing date. All bidders, to whom the bid documents have been issued and where the FAIS Ombud have record

ISSUE DATE			PAGE 8 OF 36
TITLE	FAIS202324-T001 [SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM]	INITIAL HERE →	BIDDER'S INITIALS

of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the FAIS Ombud's website under the relevant tender information. All prospective bidders should, therefore, ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.

- 13.2 The FAIS Ombud reserves the right not to accept the lowest priced bid or any bid in part or in whole.
- 13.3 The FAIS Ombud reserves the right to award this bid as a whole or in part.
- 13.4 The FAIS Ombud reserves the right to conduct site visits at bidder's corporate offices and/or at client sites if so required.
- 13.5 The FAIS Ombud reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in the National Treasury Instruction Note 02 of 2016/2017: Cost Containment Measures, where relevant.
- 13.6 The FAIS Ombud reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the FAIS Ombud to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

14. Undertaking by bidder

- 14.1 By submitting a bid in response to this tender, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the FAIS Ombud on the terms and conditions and in accordance with the specifications stipulated in this bid document.
- 14.2 The bidder shall prepare for a possible presentation should the FAIS Ombud require such and the bidder shall be notified thereof in good time before the actual presentation date. Such presentation may include a practical demonstration of products or services as called for in this bid.
- 14.3 The bidder agrees that the offer contained in its bid shall remain binding upon him and receptive for acceptance by the FAIS Ombud during the bid validity period indicated in this document and calculated from the bid closing date. Its acceptance shall be subject to the terms and conditions contained in this bid document read with the bid.
- 14.4 The bidder furthermore confirms that they have satisfied themselves as to the correctness and validity of their bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all their obligations under a resulting contract for the services contemplated in this bid; and that they accept that any mistakes regarding price(s) and calculations will be at their risk.

14.5 The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on them under the supply agreement and Service Level Agreement (SLA) to be concluded with the FAIS Ombud, as the principal(s) liable for the due fulfilment of such contract.

14.6 The bidder accepts that all costs incurred in the preparation, presentation and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with this bid will become FAIS Ombud property unless otherwise stated by the bidder/s at the time of submission.

15. Central supplier database

15.1 The FAIS Ombud will not award any bid to a supplier who is not registered as a prospective supplier on the Central Supplier Database (CSD) as required in terms of National Treasury Circular No. 3 of 2015/2016 and National Treasury SCM Instruction Note 4A of 2016/2017.

15.2 The supplier is responsible to continuously update their information, including personal information on the CSD to ensure that it is complete, accurate and not misleading.

16. Supplier performance management

16.1 Supplier Performance Management is viewed by the FAIS Ombud as a critical component in ensuring value for money acquisition and good supplier relations between the FAIS Ombud and its suppliers.

16.2 The successful bidder shall upon receipt of written notification of an award, be required to conclude an SLA with the FAIS Ombud (where applicable), which will form an integral part of the supply agreement. The SLA will serve as a tool to measure, monitor and assess the supplier's performance and ensure effective delivery of service, quality and value-add to the FAIS Ombud's business.

16.3 The successful bidder will be required to comply with the above conditions, and also provide a scorecard on how their product/service offering is being measured to achieve the objectives of this condition.

17. Cancellation of contract

17.1 If the FAIS Ombud is satisfied that any person (including an employee, partner, director or shareholder of the tenderer or a person acting on behalf of or with the knowledge of the tenderer), firm or company:

17.1.1 is executing a contract with the FAIS Ombud unsatisfactorily,

- 17.1.2 has in any manner been involved in a corrupt act or provided gift or remuneration in relation to any officer or employee of the FAIS Ombud in connection with obtaining or executing a contract,
- 17.1.3 has acted in bad faith, in a fraudulent manner or committed an offence in obtaining or executing a contract,
- 17.1.4 has in any manner influenced or attempted to influence the awarding of a FAIS Ombud's bid,
- 17.1.5 has when advised that his bid has been accepted, given notice of his inability to execute or sign the contract or to furnish any security required,
- 17.1.6 has engaged in any anti-competitive behaviour, including having entered into any agreement or arrangement, whether legally binding or not, with any other person, firm or company to refrain from tendering for this contract, or relating to the bid price to be submitted by either party,
- 17.1.7 has disclosed to any other person, any information relating to this bid, except where disclosure, in confidence, was necessary to obtain quotations required for the preparation of the bid,

the FAIS Ombud may, in addition to any other legal recourse, which it may have, cancel the contract between the FAIS Ombud and such a person and/or resolve that no bid from such a person will be favourably considered for a specified period.

- 17.2 Any restriction imposed upon any person shall apply to any other person with which such a person is actively associated.

18. Applicable laws

- 18.1 The laws of the Republic of South Africa shall be applicable to each contract created by the acceptance of a bid and each bidder shall indicate an address in the Republic and specify it in the tender as his domicilium citandi et executandi where any legal process may be served on him.
- 18.2 Each bidder shall accept the jurisdiction of the courts of the Republic of South Africa.

19. Reasons for disqualification of bid

19.1 The FAIS Ombud reserves the right to disqualify any bidder who does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder. However, the bidder will be notified in writing of such disqualification:

- 19.1.1 bidders who submit incomplete information and documentation as specified in the requirements of this tender document;
- 19.1.2 bidders who submit information that is fraudulent, factually untrue or inaccurate.
- 19.1.3 bidders who receive information not available to other potential bidders through any means;
- 19.1.4 bidders who do not comply with mandatory requirements, if stipulated in the tender document;

20. Delegation of authority

20.1 The FAIS Ombud may delegate any power vested in it by virtue of these rules to an officer or employee of the FAIS Ombud.

21. Bid rules are binding

21.1 The bid rules as well as the instructions given in the official tender notice shall be binding on all bidders submitting bid applications for the service or services set out in the bid document.

22. Language of contract

22.1 The bid documents are drafted in English and any contract, which originates from the acceptance of the bid, will be interpreted and construed in English.

D. TERMS OF REFERENCE

23. Objectives

23.1 The broad objectives of this bid include:

23.1.1 To provide prospective bidders with adequate information to understand and respond to the FAIS Ombud's requirements to appoint a service provider to provide support and maintenance including software licenses for the current CRM Microsoft Dynamic 365 system over a period of three (3) years.

23.1.2 To ensure uniformity in the responses received from each prospective service provider.

23.1.3 To provide a structured framework for the evaluation of proposals.

24. Background

24.1 In executing its mandate, the FAIS Ombud resolves disputes between Financial Services Providers and their consumers in a procedurally fair, informal, economical, and expeditious manner. The FAIS Ombud receives complaints from consumers against Financial Services Providers on a regular basis. The complaints are received through telephone, facsimile, walk-ins, through the FAIS Ombud website portal and electronic mail. The complaints are then captured on CRM Microsoft Dynamic 365 system and thereafter, allocated for investigation.

24.2 Once an investigation is conducted, a complaint can either be dismissed, referred, settled, or determined. This process is also manual.

24.3 The FAIS Ombud intends to procure support and maintenance including software licenses for the current CRM Microsoft Dynamic 365 system to effectively execute its mandate in a manner that is more efficient.

25. Purpose of the request for bid

25.1 The purpose of this request is to appoint a bidder who is an accredited Microsoft business partner to provide support and maintenance including software licenses for the current CRM Microsoft Dynamics 365 system for a period of 36 months. Proof of Microsoft accreditation as business partner must be submitted (refer to requirements on paragraph 33.1)

25.2 The Service provider is also expected to provide and implement an SMS solution that will need to be integrated with the current CRM Microsoft Dynamics 365 system.

26. Scope of work

26.1 The proposed solution must meet the following minimum requirements:

26.1.1 The service provider must take over from the current service provider, support and maintain CRM Microsoft Dynamics 365 system which is already integrated with Microsoft Outlook.

26.1.2 The service provider will be required to provide, implement, and integrate an SMS solution with the current MS CRM Dynamics 365 system. The **SMS solution** should provide for the following:

26.1.2.1 Send a single message to one or multiple users and

26.1.2.2 Send multiple messages to multiple users.

26.1.3 The SMS solution should be able to cater for the following minimum volumes:

26.1.3.1 **Client Care Centre:** A minimum of 5000 e-mails per month to acknowledge complaints, notify complainants of closed complaints and the rating of customer satisfaction.

26.1.3.2 **Case Management:** A minimum of 5000 e-mails per month to acknowledge complaints assigned to Case Managers, notify complainants of complaints sent in respect of Rule 6(b), notify complainants of closed complaints and the rating of customer satisfaction

26.1.3.3 **Marketing and Awareness:** A minimum of 5000 e-mails per year as and when there is a need to send notification before and during marketing campaigns

26.1.4 In total a **minimum of 10 000 SMSs** is required on a monthly basis with a further 5000 per annum.

26.1.5 Furthermore, the solution should generate a detailed report of all sent SMS's per month.

26.1.6 The service provider must provide real time system monitoring and reporting.

26.1.7 The service provider must facilitate the renewal of annual licenses for the system to function.

26.2 The appointed service provider must be able to transfer roles and responsibilities and take over ownership from the current service provider in a smooth manner, without disrupting the day-to-day activities of the FAIS Ombud.

26.3 The appointed service provider must train users as and when required by the office.

Table 1

DESCRIPTION	QUANTITY
System administrators	2
Super users (including train the trainers)	9
Normal users (limited access)	33

26.4 A quotation must be provided that includes the support and maintenance for the CRM Microsoft dynamics 365 system, SMS solution as well as system development or enhancement for a duration of 36 months. The quotation must align with the table below.

Table 2

DESCRIPTION	YEAR 1	YEAR 2	YEAR 3
Support and maintenance			
Other			
Total			

26.5 Should the office require new development or enhancement that will not be covered by support and maintenance, a separate purchase order will be issued. A quotation must be provided that specify the hourly rates for the below resources.

Table 3

DESCRIPTION	YEAR 1	YEAR 2	YEAR 3
Technical support or equivalent			
Specialist support or equivalent			
Database specialist or equivalent			
Developer or equivalent			

26.6 The current CRM Microsoft Dynamics 365 system is hosted in the cloud. The appointed service provider is required to take over from the current service provider, provide support and maintenance, renew licenses and integrate SMS solution. The appointed service provider will be required to submit a quotation for licence renewal for CRM Microsoft dynamics 365 as and when is due for renewal.

27. Contract conditions

27.1 The service provider will be required to furnish the FAIS Ombud with the following:

27.1.1 Hosting Solution:

27.1.1.1 The appointed service provider must establish communication with the current service provider to assume responsibility. FAIS Ombud representative will be part of the communication for the hosted solution.

27.1.2 Backup Strategy:

27.1.2.1 The appointed service provider is expected to develop a backup strategy / process and backup the system prior to taking over the hosted solution.

27.1.3 Project Plan:

27.1.3.1 The service provider is responsible for providing a comprehensive project plan, which includes management, approach, and estimated duration for the takeover process of the current system.

27.1.3.2 Ownership of project-related meetings, including:

27.1.3.2.1 Weekly meetings

27.1.3.2.2 Monthly project steering committee meeting

27.1.3.2.3 Monitoring and management of risk factors and project delays.

27.1.4 Support and maintenance

27.1.4.1 The service provider must provide support and maintenance, including system development or enhancement as and when required. While remote support can be utilized, it is essential that onsite support is available for urgent requests.

28. Project timeline

28.1 The contractor is required to assume responsibility within a maximum of two (2) weeks from the date of receiving a purchase order from the FAIS Ombud.

29. Bid evaluation

29.1 The proposals will be evaluated as follows.

29.1.1 Evaluation Stage One: Compliance

Compliance with administrative requirements stated in the Standard Bidding Documents and the mandatory requirements as listed in paragraph 33. In this evaluation stage, all bidders that fail to provide the required information and documentation, will be disqualified from further evaluation.

29.1.2 Evaluation Stage Two: Functional evaluation (Desktop evaluation)

In this evaluation stage, bidders are expected to obtain a minimum of 70 out of 100 points to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation stage.

29.1.3 Evaluation Stage Three: Functional evaluation (Presentation)

In this evaluation stage, bidders are expected to obtain a minimum of 75 out of 100 points to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation stage.

29.1.4 Evaluation Stage Four: Preference Point System

The 80/20 preference point system shall be applicable to this stage, where 80 points represent maximum obtainable points for the lowest acceptable price, and 20 points represents the specific goals in accordance with the table as listed in the bid documentation.

30. Functional evaluation (Desktop)

30.1 The bid/proposal will undergo an evaluation process based on functionality and will be assessed using the following rating system:

Values: 0=Poor 1=Below average, 2=Average, 3=Good, 4=Very Good, 5=Excellent

Table 4

EVALUATION CRITERIA	DESCRIPTION	POINTS ALLOCATION		SUB-WEIGHT	WEIGHT
		DETAILED DESCRIPTION	RATING		
1. Understanding scope of project	1.1 A detailed takeover plan of current the MS CRM Dynamics hosted solution, and the integration of the SMS services must be provided. The plan should encompass various aspects including but not limited to: a) Takeover plan clearly defining deliverables and timelines not exceeding one month. b) Integration plan outlining how the MS CRM Dynamics 365 system and SMS will be seamlessly integrated. c) Support and maintenance plan to be provided for post integration.	1.1.1 No detailed plan has been provided or a detailed plan has been provided encompassing one or none of the listed points	0	35	50
		1.1.2 A detailed plan has been provided encompassing any 2 points of (a) to (c)	3		
		1.1.3 A detailed plan has been provided encompassing (a) to (c) points.	5		
2. Experience and qualifications	2.1 The bidder must provide a Curriculum Vitae (CV) outlining the experience and expertise of each local resource (available in South Africa.) demonstrating their ability to effectively support and maintain the existing MS CRM Dynamics 365 system.	2.1.1. The CV has either not been submitted or the submitted CV does not demonstrate the required experience.	0	32.5	50
		2.1.2. Submitted two CV's of local resources with two years of experience in supporting and maintaining CRM MS Dynamics 365.	2		
		2.1.3. Submitted three CV's of local resources with two years of experience in supporting and maintaining CRM MS Dynamics 365.	3		

		2.1.4. Submitted four CV's of local resources with two years of experience in supporting and maintaining CRM MS Dynamics 365.	4		
		2.1.5. Submitted five CV's of local resources with two years of experience in supporting and maintaining CRM MS Dynamics 365.	5		
	2.2 Bidders experience in delivering the MS CRM Dynamics 365 system to corporate clients. The bidder must submit three (3) contactable reference letters, on official letterhead, from clients for whom they have successfully implemented and provided support and maintenance on Microsoft Dynamics 365 within the last 5 years from the closing date of the bid. The year in which the Microsoft Dynamics 365 system was implemented and support and maintenance was provided, must be indicated on the reference letter to be provided.	2.2.1 No reference letters submitted or submitted reference letter not indicating the date on which the implementation and support was provided on the MS Dynamic 365.	0	32.5	
		2.2.2 One reference letter has been submitted from where the bidder has implemented and provided support and maintenance on Microsoft Dynamics 365 within the last 5 years from the closing date of the bid. The year in which implementation and support maintenance was provided is indicated in the letter (<i>in case where reference letter does not indicate the date on which the MS Dynamic 365 and support and maintenance were provided, the award letter or purchase order must be provided together with the reference letter</i>).	2		
		2.2.3 Two reference letters have been submitted from where the bidder has implemented and provided support and maintenance on Microsoft Dynamics 365 within the last 5 years from the closing date of the bid. The year in which implementation and support maintenance was provided is indicated in the two letters (<i>in case where reference letter does not indicate the</i>	3		

		<i>date in which the MS Dynamic 365 and support and maintenance was provided, the award letter or purchase order must be provided together with reference letter).</i>			
		2.2.4 Three reference letters have been submitted from where the bidder has implemented and provided support and maintenance on Microsoft Dynamics 365 within the last 5 years from the closing date of the bid. The year in which implementation and support maintenance was provided is indicated in the three letters <i>(in case where reference letter does not indicate the date in which the MS Dynamic 365 and support and maintenance was provided, the award letter or purchase order must be provided together with reference letter).</i>	5		
TOTAL					100

31. Functional evaluation (Presentation)

31.1 Functionality criteria on the presentation to the FAIS Ombud by short-listed bidders is as follows:

Values: 1=Poor 2=Below average, 3=Average, 4=Good, 5=Very Good

Table 5

EVALUATION CRITERIA	DESCRIPTION	POINTS ALLOCATION		SUB-WEIGHT	WEIGHT
		DETAILED DESCRIPTION	RATING		
1. Takeover Plan, including SMS Service and Outlook Integration.	1.1 The service provider is required to provide a Takeover Plan that encompasses both SMS solution and Outlook Integration.	1.1.1 Takeover Plan, including SMS Service and Outlook Integration is not covered in the presentation. Also steps and strategies for seamlessly taking over of the current system and integration of the SMS solution and Outlook are not covered.	0	100	100
	The presentation must outline the steps and strategies for seamlessly taking over of the current system and integration of the SMS solution and Outlook.	1.1.2 Takeover Plan, including SMS Service and Outlook Integration is covered in the presentation. The presentation outlined the steps and strategies for seamlessly taking over of the current system and integration of the SMS solution and Outlook.	5		
TOTAL					100

32. Preference point system

32.1 General conditions

32.1.1 The applicable preference point system for this tender is the 80/20 preference point system.

32.2 The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

32.3 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

32.4 The organ of state reserves the right to require a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

32.5 Formulae for procurement of goods and services

32.5.1 Points awarded for price

32.5.1.1 The 80/20 Preference Point Systems

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

80/20

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

Where

P_s = Points scored for the price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

32.6 Points awarded for specific goals

32.6.1 The applicable preference points for this tender is 80/20. While 80 will be allocated for price and 20 for specific goals indicated in table 5 below.

Table 6

SPECIFIC GOALS ALLOCATED POINTS	80/20 PREFERENCE POINTS ALLOCATED	PROOF OF CLAIM FOR A SPECIFIC GOAL	
≥ 51% black owned	10	BEE Certificate/Sworn Affidavit/Latest CSD report	
≥ 31 % black women-owned	6	BEE Certificate/Sworn Affidavit/Latest CSD report	
QSE or EME	4	BEE Certificate/Sworn Affidavit/Latest CSD report	
Total	20		

33. Additional information required

33.1 The following compulsory additional information is required. Failure to complete and supply any of these documents will lead to disqualification of this bid.

Table 7

ELIGIBILITY/MANDATORY REQUIREMENT	COMPLY	NOT COMPLY
(i) Proof of registration on the National Treasury Central Supplier Database with a compliant tax status		
(ii) Submission of completed SBD 1		
(iii) Submission of completed SBD 3.1		
(iv) Submission of completed SBD 4		
(v) Submission of completed SBD 6.1		
(vi) The service provider/organization must furnish proof that they are accredited Microsoft business partners		
(vi) Submission of quotation		

34. Timeline of the bid process

- 34.1 The period of validity of the tender and the withdrawal of offers, after the closing date and time are 90 days, expiring on **24 November 2023**. The project timeframes of this bid are set out below:

Table 8

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on Government e-tender portal	25 July 2023
	Advertisement of bid on a newspaper	30 July 2023
2.	Deadlines for submission of questions relating to bid by the bidders	10 August 2023
3.	Bid closing date	25 August 2023
5.	Compliance: Bid Evaluation Committee	30 August 2023
6.	Functional Evaluation: (Desktop)	5 September 2023
7.	Functional Evaluation: (Presentation)	13 September 2023
8.	Preference Point System: Evaluation	18 September 2023
9.	Bid Award: Bid Adjudication Committee	26 September 2023
10.	Notification of the outcome to the bidders	29 September 2023

- 34.2 All dates and times in this bid are South African Standard Time.

- 34.3 Any time or date in this bid is subject to change at the FAIS Ombud's discretion. The establishment of a time or date in this bid does not create an obligation on the part of the FAIS Ombud to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if the FAIS Ombud extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

E. STANDARD BIDDING DOCUMENTS

Standard Bidding Document (SBD 1)

PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)				
BID NUMBER:	FAIS 2023/24 – T001	CLOSING DATE:	25 August 2023	CLOSING TIME: 11H00
DESCRIPTION	SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM			
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)				
MENLYN CENTRAL OFFICE BUILDING, 11 TH FLOOR				
125 DALLAS AVENUE				
WATERKLOOF GLEN				
PRETORIA, 0010				
ALL QUESTIONS RELATING TO THE CONTENTS OF THE TENDER (CONDITIONS, RULES, TERMS OF REFERENCE ETC.) MUST BE FORWARDED IN WRITING VIA EMAIL TO TENDERS@FAISOMBUD.CO.ZA				
SUPPLIER INFORMATION				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS				

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO

IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

Standard Bidding Document (SBD 3.1)

PRICING SCHEDULE – FIRM PRICES
(Purchases)

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

NAME OF BIDDER.....	BID NUMBER.....
CLOSING TIME 11:00	CLOSING DATE.....

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

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)
-	Required by:	.....	.....
-	At:	.....	.....
-	Brand and model	.....	.....
-	Country of origin	.....	.....
-	Does the offer comply with the specification(s)?		*YES/NO
-	If not to specification, indicate deviation(s)	.....	
-	Period required for delivery	.....	*Delivery: Firm/not firm
-	Delivery basis	.....	

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

** "all applicable taxes" includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

*Delete if not applicable

ISSUE DATE			PAGE 27 OF 36
TITLE	FAIS202324-T001 [SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM]	INITIAL HERE →	BIDDER'S INITIALS

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. BIDDER'S DECLARATION

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members /partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

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

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.1.2 If so, furnish particulars:

.....
.....

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

2.1.3 If so, furnish particulars:

.....
.....

3. DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

^{1.} Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....
Signature Date

.....
Position Name of bidder

ISSUE DATE				PAGE 30 OF 36
TITLE	FAIS202324-T001 [SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM]	INITIAL HERE →	BIDDER'S INITIALS	

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

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

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

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and the applicable preference point system for this tender is the **80/20** preference point system.

1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for price and specific goals.

1.3 The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.4 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.5 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1 POINTS AWARDED FOR PRICE

3.1.1 The 80/20 Preference Point Systems

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

80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2 POINTS AWARDED FOR SPECIFIC GOALS

- 3.2.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

ISSUE DATE				PAGE 32 OF 36
TITLE	FAIS202324-T001 [SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM]	INITIAL HERE →	BIDDER'S INITIALS	

3.2.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system: or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

.. Table 9

THE SPECIFIC GOALS ALLOCATED POINTS IN TERMS OF THIS TENDER	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM)	NUMBER OF POINTS CLAIMED (80/20 SYSTEM) (TO BE COMPLETED BY THE TENDERER)	PROOF OF CLAIM FOR A SPECIFIC GOAL
≥ 51% black owned	10		BEE Certificate/Sworn Affidavit/Latest CSD report
≥ 31 % black women owned	6		BEE Certificate/Sworn Affidavit/Latest CSD report
QSE or EME	4		BEE Certificate/Sworn Affidavit/Latest CSD report
TOTAL	20		

4. DECLARATION WITH REGARD TO COMPANY/FIRM

4.1 Name of company/firm.....

4.2 Company registration number:

4.3 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

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

ISSUE DATE				PAGE 34 OF 36
TITLE	FAIS202324-T001 [SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM]	INITIAL HERE →		BIDDER'S INITIALS

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	.....
DATE:	.....
ADDRESS:	..... ..... ..... .....

F. ADMINISTRATIVE CHECKLIST

Hereunder is a checklist to ensure that the bid document is complete in terms of administrative compliance. Please ensure that the following forms have been completed and signed and that all documents, as requested, are attached to the tender document.

Table 10

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/NO
1.	SBD 1	Invitation to bid	Is the form duly completed and signed?	
2.	SBD 3.3	Pricing Schedule	Is the form duly completed and signed?	
3.	SBD 4	Declaration of Interest	Is the form duly completed and signed?	
4.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2022	Is the form duly completed, B-BBEE points claimed and the form signed?	
5.	B-BBEE status level verification certificate		Is proof of the B-BBEE Status level of the contributor attached?	
6.	Proof of registration on the National Treasury Central Supplier Database (CSD)		Is the National Treasury Central Supplier Database (CSD) report attached?	
8.	Tender submission		Two (2) printed copies (one original and one (1) copy of the original submitted?	
			One (1) electronic copy submitted?	

I, the undersigned (name) certify that the information
furnished on this checklist is true and correct.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder