

THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY

Terms of Reference

THE APPOINTMENT OF A SERVICE PROVIDER TO SUPPORT AND MAINTAIN THE MICROSOFT DYNAMICS 365 ENTERPRISE RESOURCE PLANNING SYSTEM FOR SIX (06) MONTHS

No late applications will be accepted

Board members: Mr T Tshefuta (Chairperson) | Ms C Brink | Mr L Nzimande
Mr NN Maesela | Mr PB Makhafane | Mr MI Napo
Ms T Molefe-Sefanyetso | Mr PB Moopelwa | Ms L Dludla | Ms N Nzimande
Ms N Silinyana | Mr M Ramakgale

CEO: Ms B Lerumo

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1. INTRODUCTION

The Public Service Sector Education and Training Authority (PSETA) is a Sector Education and Training Authority (SETA) established in terms of section 9(1) of the Skills Development Act 97 of 1998 as amended and is classified as a National Public Entity under schedule 3A of the Public Finance Management Act, 1 of 1999.

This document outlines the criteria and requirements for selecting a suitable service provider to support and maintain the PSETA Enterprise Resource Planning (ERP) system.

2. BACKGROUND & CONTEXT

In 2020, the PSETA appointed a service provider to provide a customized ERP system to manage its information needs and requirements. Subsequently, Microsoft Dynamics 365 (Finance & Operations & CRM) was implemented as the organization's solution of choice. The support and maintenance contract is due to expire on 25 July 2024. For this reason, the organization is looking for a suitable Microsoft cloud partner to assist with supporting and maintaining the ERP system.

3. SCOPE OF WORK

These will include but not be limited to:

- Enhancement of configurations & customizations.
- Support, manage, and deliver ongoing platform application support to achieve customer satisfaction and service excellence.
- Ensure high standards of customer engagement and services are maintained.
- Provide ongoing support to end users, assisting with troubleshooting or additional training via email, phone, or site visits.

- Manage and implement change requests per the PSETA Change Management Procedures.

4. METHODOLOGY AND APPROACH

The service provider must provide a detailed methodology and approach or a project plan for support and maintenance services, including resource allocations.

5. COMPETENCY AND EXPERTISE

The service provider must meet the following requirements for eligibility:

- a. Microsoft Cloud partner certification.
- b. Minimum five (05) years' experience in implementing and supporting ERP systems.

6. TIMELINES OF THE CONTRACT

This assignment is for six (06) months, starting from 26 July 2024.

7. QUALITY AND REPORTING REQUIREMENTS

The service provider will report directly to the ICT Manager.

8. PRICING

The proposed total pricing must include VAT. The PSETA may require a breakdown of rates on any of the services/items priced, and providers are required to provide it.

The PSETA reserves the right to negotiate the selection/prioritization of deliverables in line with the contract price.

9. EVALUATION PROCESS

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goals, once the minimum functionality criteria are met.

PHASE 1: FUNCTIONALITY EVALUATION

Bids must meet the minimum eligibility criteria in respect of functionality of 75 points out of a 100 points that will be awarded for functionality before they are considered further. Any bid that does not meet the minimum eligibility threshold will be automatically disqualified.

PHASE 2

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goal, once the minimum functionality criteria are met.

The evaluation will be based on:

Phase 1: Functionality Evaluation		
Phase 2: Preferential Point System	Points allocated for specific goals	Points
Price		80
Special goals		20
Black-owned company	8	
Women	4	

Youth	5	
Disability	3	
Total		100

9.1.1 The functionality criteria together with the maximum points to be awarded are set out below:

Phase 1

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
1.	Methodology / Project Plan	Strength of the proposal in response to the requirements.	1 = Proposal and project plan not acceptable (all areas not covered). 2 = Poorly written proposal and project plan (few areas covered) 3 = Average proposal (most areas covered) 4 = Good proposal (all areas covered but not in depth)	30

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			5= Excellent detailed proposal (all areas thoroughly addressed in depth)	
	Microsoft Cloud Partner Accreditation	Company accreditation with OEM	1= No accreditation or silver accreditation. 3 = Gold partner accreditation 5= Platinum partner accreditation	30
2.	History of successful delivery of the same or similar project(s).	Provide reference Letters: Reference letters must be on company letterhead, signed and dated, otherwise, they will not be considered.	1= 0 references in the past five years 2= one (1) to two (2) relevant references in the past five years 3= three (3) relevant references in the past five years 4= four (4) relevant references in the past five years 5= five (5) relevant	10

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			references and above in the past five years	
3.	Experience, skills, and qualifications of the support team	Number of years of experience in the field of software development, support, and maintenance (Cloud Applications & Microsoft Applications)	• 1= No submission of CV in experience with qualifications. • 2= CVs and less than 5 years of experience with qualifications. • 3 = CVs, a minimum of 5 years in experience with qualifications. • 4 = CVs and a minimum of 6 to 9 years in experience with qualifications. • 5 = CVs with 10 years and above in experience with qualifications.	30

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
	Total			100

10. FORMAT OF THE BID SUBMISSION

- 10.1. Company profile indicating all the requirements as per the evaluation criteria.
- 10.2. Proposals must be submitted in 3 copies, 1 original and 2 copies.
- 10.2. Team member names and roles.
- 10.3. CVs and certified copies of qualifications.
- 10.4. Track record and experience. Three signed reference letters of similar work reflect clients' telephone numbers and links or images of the work.
- 10.5. A valid Tax compliance status (TCS) PIN or proof of exemption from SARS.
- 10.6. Certified copy of BB-BEE certificate or affidavit
- 10.7. Copy of the registration document of the organisation (CIPC);
- 10.8. All Standard Bidding Documents (SBD) must be completed and signed.
 - SBD 1
 - SBD 4
 - SBD 6.1
 - Proof of registration on the Central Supplier Database.
 - General Condition of Contract (each page signed)

NB: Failure to submit documents requested in section 10.8 will disqualify the proposal.

Bid proposals must be submitted to:

Ms Ursula Mathonsi

Manager: Supply Chain Management

The PSETA

Ground Floor, Woodpecker Building, Hillcrest Office Park, Lynwood, Pretoria

No late applications will be accepted.

No electronic bid applications will be accepted.

The Validity periods of the bids is 90 days from the closing date. Please direct all queries to Ms. Ursula Mathonsi via email on ursulam@pseta.org.za or telephonically on 012-4235700