

**THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY**

**Terms of Reference**

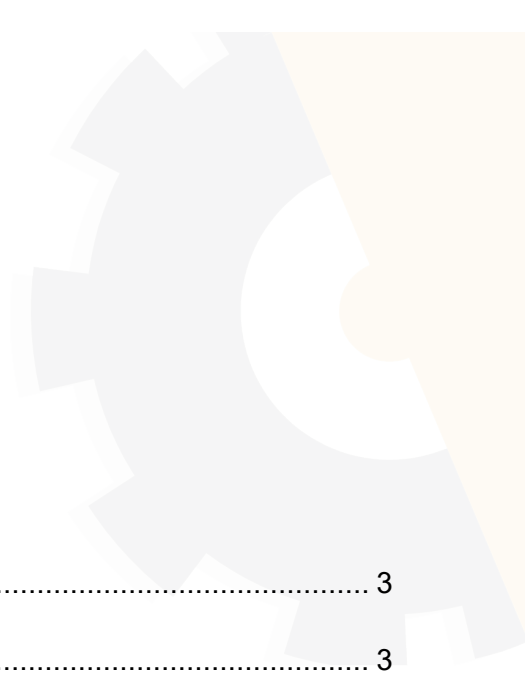
**THE APPOINTMENT OF A SERVICE PROVIDER TO SUPPORT AND MAINTAIN THE MICROSOFT DYNAMICS 365 ENTERPRISE RESOURCE PLANNING SYSTEM FOR SIX (06) MONTHS**

**RFP NUMBER:RFP/2021/001450**

**CLOSING DATE: 24 JULY 2026**

**CLOSING TIME: 11:00**

**No late applications will be accepted**



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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 31 July 2026. For this reason, the organization is looking for a suitable Microsoft cloud partner to assist with supporting and maintaining the ERP system.

The prospective provider will be handed over documentation to the existing 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.
- Support the business on quarterly SETMIS reporting to the Executive Authority.

- Support the business on the National Learner Reporting Database (NLRD) reporting to SAQA.
- Provide weekly support & maintenance of the cloud infrastructure and reporting thereof, limited to Dynamics 365 Application Platform.

**SLA Targets:**

Priority	Business Impact	Response Time	Resolution Target
<b>Priority 1 (Critical)</b>	Complete system outage or critical business process unavailable. No workaround exists.	<b>15–30 minutes</b>	4 hours
<b>Priority 2 (High)</b>	Major functionality unavailable with significant business impact. Limited workaround available.	<b>1 hour</b>	8 business hours
<b>Priority 3 (Medium)</b>	Business function affected but workaround available. Moderate impact on users.	<b>4 business hours</b>	2 business days
<b>Priority 4 (Low)</b>	Minor issue or service request with little or no business impact.	<b>1 business day</b>	5 business days
<b>Priority 5 (Enhancement)</b>	New functionality or change request.	<b>2 business days</b>	As agreed through the Change Management process

#### 4. SYSTEM DESCRIPTION

Name of the system	Microsoft Dynamics 365 (CRM, Finance & Operations)
Number of users	60
System Customizations	<b>CRM</b> fully customized to the PSETA environment. <b>Operations:</b> Performance Development System customized to PSETA environment.
Finance & Operation	Installed product version : 10.0.47 (10.0.2527.130) Installed platform version : Update71 (7.0.7858.111)
CRM	Dataverse version 9.2.26062.155
Number of environments	UAT, CONFIG & PRODUCTION

#### 5. 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.

#### 6. TIMELINES OF THE CONTRACT

This assignment is for six (06) months.

#### 7. QUALITY AND REPORTING REQUIREMENTS

The service provider will report directly to the ICT Manager.

#### 8. PRICING

The proposed total pricing must include VAT and on a fixed monthly rate over the duration of the project. 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 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 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	<ul style="list-style-type: none"> <li>Strength of the proposal in response to the requirements.</li> </ul>	1 = Proposal and project plan not acceptable (all areas not covered). 2 = Poorly written proposal and project	30

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			plan (few areas covered) 3 = Average proposal (most areas covered) 4 = Good proposal (all areas covered but not in depth) 5= Excellent detailed proposal (all areas thoroughly addressed in depth)	
2	Account/Project Manager Skills & Experience	Number of years of experience in the field of software development, support, and maintenance (Cloud Applications & Microsoft Applications)	<ul style="list-style-type: none"> <li>• 1= No submission of CV in experience with qualifications.</li> <li>• 2= CVs and less than 5 years of experience with qualifications.</li> <li>• 3 = CVs, a minimum of 5 years in experience with qualifications.</li> <li>• 4 = CVs and a minimum of 6 to 9 years in experience with qualifications.</li> </ul>	30

NO	EVALUATION CRITERIA	GUIDELINES FOR APPLICATION	SCORE GUIDE	WEIGHT
			<ul style="list-style-type: none"> <li>• 5 = CVs with 10 years and above in experience with qualifications.</li> </ul>	
3	History of successful delivery of the same or similar project(s).	<p>Provide reference Letters:</p> <p>Reference letters must be on company letterhead, signed and dated, otherwise, they will not be considered.</p>	<p>1= 0 references in the past five years</p> <p>2= one (1) to two (2) relevant references in the past five years</p> <p>3= three (3) relevant references in the past five years</p> <p>4= four (4) relevant references in the past five years</p> <p>5= five (5) relevant references and above in the past five years</p>	10
4	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) – combined	<ul style="list-style-type: none"> <li>• 1= No submission of CV in experience with qualifications.</li> <li>• 2= CVs and less than 5 years of experience with qualifications.</li> <li>• 3 = CVs, a minimum of 5 years in experience with qualifications.</li> </ul>	30

NO	EVALUATION CRITERIA	GUIDELINES FOR APPLICATION	SCORE GUIDE	WEIGHT
			<ul style="list-style-type: none"> <li>• 4 = CVs and a minimum of 6 to 9 years in experience with qualifications.</li> <li>• 5 = CVs with 10 years and above in experience with qualifications.</li> </ul>	
	<b>Total</b>			<b>100</b>

Phase 2: Preferential Point System		Points
<b>Price</b>		<b>80</b>
<b>Special goals</b>		<b>20</b>
Black owned company Bidder who has 51% to 100% black people ownership	8	
Women Bidder who has 51% to 100% women ownership	4	
Youth	5	

Bidder who has 51% to 100% youth ownership		
Disability Bidder who has 51% to 100% disability ownership	3	
<b>Total</b>		<b>100</b>

## 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.

### 10. IMPORTANT MANDATORY INFORMATION FOR BIDDERS

All Standard Bidding documents (SBD) must be completed and signed.

- SBD 1 (All sections must be fully completed)
- SBD 4 (All sections must be fully completed)
- SBD 6.1 (All sections must be fully completed)
- Proof of registration on the Central Supplier Database.
- General Condition of Contract (each page signed/ initialled)
- Microsoft Cloud Partner Letter

**NB: Failure to submit documents requested in section 10 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](mailto:ursulam@pseta.org.za) or telephonically on 012-4235700