



Quality Council for Trades & Occupations

www.qcto.org.za

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INVITATION TO TENDER

FOR THE APPOINTMENT OF A REPUTABLE AND CAPABLE SERVICE PROVIDER FOR THE PROVISION OF SAGE INTACCT & SAGE 300 SOFTWARE LICENSES, INCLUDING INSTALLATION, IMPLEMENTATION, AND SUPPORT FOR A PERIOD SIXTY (60) MONTHS

TENDER NO: QCTO 04/2023

Closing Date	Address for Submission
Date: 14 August 2024 Time: 11:00am	Quality Council for Trade and Occupations Tender Box @ Reception 256 Glyn Street Hatfield Pretoria 0083

Late Submissions will not be considered

Company Name		
Address		
Contact person		
Contact numbers	(w)	(cell)
Email address		

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1. INTRODUCTION

The QCTO is a Schedule 3A Public Entity that was established in accordance with the Skills Development Act, No. 97 of 1998 (as amended) and the National Qualifications Framework Act, No. 67 of 2008 (as amended) and came into operation on 1 April 2010. The main functions of the QCTO amongst others is to develop standards for occupational qualifications including trades and skills programmes, accredit skills development providers, and assessment centres, manage assessments, quality assurance and issue certificates to qualifying candidates. Therefore, the QCTO is responsible for standards generation and maintenance; quality assurance of occupational full and part qualifications registered on the National Qualifications Framework (NQF) and the Occupational Qualifications Sub-Framework (OQSF) policy, including skills programmes. The QCTO has approximately 120 staff members and is situated in Hatfield, Pretoria. More information can be obtained from <https://www.qcto.org.za/>.

Prospective Service Providers who are interested in providing SAGE INTACCT & SAGE 300 software licensing, installation, implementation and support for a period of sixty (60) months and in accordance with the General Conditions of the offer, as well as the specifications are requested to complete this tender document, together with all the standard bidding documents in full.

Briefing Session Information

Compulsory Virtual Briefing session

Date: 31 July 2024

Time: 11:00am – 12:00pm

Link:

https://teams.microsoft.com/l/meetup-join/19%3ameeting_NDVlOWExZmltZTM4Zi00OGQwLTljNjctMzdIOGNmZGQzMdUx%40thread.v2/0?context=%7b%22Tid%22%3a%221aaf8259-7fdc-4376-8b09-18fa797adeed%22%2c%22Oid%22%3a%2240b134a1-0502-41a2-bf46-0099c292351f%22%7d

1.1. TENDER SUBMISSION AND COMPLIANCE

Prior to submission, the tenderers must check that all pages are properly numbered, and all required documents are signed and initialled. QCTO will hold the duly authorised signatory liable on behalf of the tenderer.

NB: Please create an index page for ease of reference. Paginate your proposal submission by using numbered file dividers or a similar system.

Bidders are advised to adhere to the below for submission

Each page should be initialled with black ink.

I/We have attached to this document:	Tick if submitted		Office use
• Four hard copies of the technical bid document including the duly completed terms of references document (initialled by authorised signatories)	Yes	No	
• Submission one tender pricing together with the completed SBD 3.3 (Separately sealed in an envelope labelled PRICING).	Yes	No	
• One (1) USB Submission of the technical bid document including the duly completed terms of references document (initialled by authorised signatories)	Yes	No	
• Duly Completed Standard Bidding Documents (SBD 1, SBD 4, SBD 6,1)	Yes	No	
• Proof of Briefing session attendance (Screenshot of session)	Yes	No	

The tenderer must submit the proposals in sealed Envelopes marked Tender Number QCTO 04/2024 placed in the tender box at 256 Glyn Street Hatfield, Pretoria, 0083 not later than the closing time and date

1.2. PRICING

- 1.2.1. The tenderer must submit details regarding the tender price for the services on the pricing schedule provided in SBD 3.3. The completed form/s must be submitted together with the pricing proposal.
- 1.2.2. Bidders are required to indicate their costs inclusive of all applicable taxes. QCTO will not provide upfront payments.
- 1.2.3. The price proposal must include VAT (if applicable).
- 1.2.4. All other cost increases will be negotiated, not exceeding the actual inflation rate (CPI).

NB: FAILURE TO PROVIDE THE PRICING PROPOSAL WILL INVALIDATE THE BID AND RESULT IN IMMEDIATE DISQUALIFICATION OF THE PROPOSAL.

1.3. PARTNERSHIPS AND LEGAL ENTITIES

In the case of the tenderer being in a partnership, close corporation or a company, a certificate reflecting the names, identity numbers and addresses of the partners, members or directors (as the case may be) must be submitted with the tender.

1.4. CONSORTIUMS AND JOINT VENTURES

- 1.4.1. If the tendering unit emanates from a joint venture or collaborative partnership or consortium (including a newly formed company), which does not have a joint track record of at least three (3) years, the individual entities that make up the tendering unit should each provide all the mandatory requirements. Should all the requirements in respect of the tendering unit or the individual entities, as the case may be, not be met, the tendering unit will be disqualified.
- 1.4.2. It is recognised that tenderers may wish to form consortia to provide the services.
- 1.4.3. In response to this invitation to tender, a consortium shall comply with the following requirements:-
 - 1.4.3.1. A copy of the agreement entered into by the consortium members shall be submitted with the tender. It shall be signed so as to be legally binding on all consortium members.
 - 1.4.3.2. The tender document shall be signed so as to be legally binding on all consortium members;

- 1.4.3.3. One of the members shall be nominated by the others as authorised to be the lead member and this authorisation shall be included in the agreement entered into between the consortium members;
- 1.4.3.4. The lead member shall be the only authorised party to make legal statements, communicate with QCTO and receive instructions for and on behalf of any or all the members of the consortium;

2. AIM OF PROPOSAL

The aim of this proposal is for QCTO to appoint a suitably qualified and experienced service provider to provide SAGE INTACCT & SAGE 300 software licensing, installation, implementation and support for a period of sixty (60) months. The appointment of the successful bidder will be for a period of sixty (60) months commencing on the date as prescribed in the Letter of Award and signed Service Level Agreement.

3. BACKGROUND

The Quality Council for Trades and Occupations (QCTO) is a Quality Council established in 2010 in terms of the Skills Development Act, No. 97 of 1998 (as amended) and the National Qualifications Framework Act, No. 67 of 2008 (as amended). Its role is to oversee the design, implementation, assessment, and certification of occupational qualifications, including trades, on the Occupational Qualifications Sub-Framework (OQSF). The QCTO also offers guidance to skills development providers who must be accredited by the QCTO to offer occupational qualifications.

In summary, the QCTO is responsible for:

Establishment and management of the Occupational Qualification Sub-Framework (OQSF);

- Occupational Qualifications and skills programmes development and maintenance;
- Accreditation of Skills Development Providers;
- Accreditation of Assessment Centres;
- Assessment;
- Certification;
- Research and Knowledge Development; and
- Stakeholder Management and Advocacy.

4. SCOPE OF SERVICES

The broad scope of work will include SAGE INTACCT & SAGE 300 software licensing, installation, implementation and support for a period of sixty (60) months. In responding to this bid, the service provider must provide a detailed methodology and approach including the implementation plan on how the service provider will deliver the services as detailed below.

4.1. The process aims to achieve the following objectives:

4.1.1.A smooth transition from SAGE Evolution, SAGE VIP, and SAGE Premier to SAGE INTACCT and SAGE 300 in the QCTO

4.1.2.Maintain consistency in existing databases and functionality.

4.2. The scope of work includes but is not limited to:

- Provide SAGE INTACCT and SAGE 300 licenses for the period of sixty (60) months
- Install SAGE INTACCT and SAGE 300 software on QCTO workstations
- As a partner assist QCTO to access SAGE INTACCT and SAGE 300 applications and facilitate renewal of its license (facilitate payment on behalf of QCTO).
- Review and analyze implemented Sage Intacct modules together with the workflows and determine alignment with Qcto's core finance business processes and requirements
- Assess the adequacy of the uploaded Master File
- Review and validate the configured Standard Chart of Accounts to ensure adequate processing and required reporting
- Review and validate the adequacy of the system to enable reporting and analytics to produce periodic and required standard reports including Income Statements and Balance Sheets
- Import and configure data from existing databases into SAGE 300 and SAGE INTACCT
- Review and validate imported and configured data
- Fixed Assets User lists/accounts
- Suppliers' details and information
- Review the ability of the system to integrate with other existing QCTO applications
- Prepare and conduct System Testing during changes and improvements
- Conduct System Training

- System maintenance and support
- Analyse and implement enhancements.
- Provide project governance documents

5. PROJECT TIMELINES

Initial implementation of the project (installation, data transfer/importing, configuration, etc.) should be completed within three (3) months of the award of this tender.

System maintenance and support, including but not limited to any required system enhancements, should continue for the full sixty (60) month term of this contract in line with the signed SLA. Although the total duration shall be sixty (60) months, the QCTO shall review the bidder's performance at the end of every six (06) months and reserves the right to terminate the contract due to non-performance.

6. SPECIAL CONDITIONS OF THE CONTRACT

The successful bidders will be expected to enter a service-level agreement with the QCTO. The service level agreement will include, amongst others, the following:

- i Period of agreement;
- ii Non-performance;
- iii Financial penalties and termination of the contract;
- iv Terms of deliverables;
- v Reviews;
- vi Confidentiality; and
- vii Disputes.

The QCTO has a standard template for Service Level Agreements into which both parties (QCTO and the successful bidder) will provide inputs. This SLA shall be the sole document governing the business relationship between the QCTO and the successful bidder. No additional agreements may supersede or govern the SLA.

7. SERVICE LEVEL AGREEMENT

The successful bidders will be expected to enter into a Service Level Agreement (SLA) with the QCTO. The SLA will include, amongst others, the following:

- i. Period of agreement;
- ii. Charges;
- iii. Changes to the proposed team;
- iv. Method of communication and reporting;
- v. Non-performance;
- vi. Financial penalties and termination of the contract;

- vii. Procedures relating to payments;
- viii. Procedures relating to management reports;
- ix. Terms of deliverables;
- x. Reviews;
- xi. Uncompleted work;
- xii. Confidentiality; and
- xiii. Disputes.

8. EVALUATION CRITERIA

QCTO may request additional information, clarification, or verification regarding any information contained in or omitted from a tenderer's proposal. This information will be requested in writing, and the bidder must provide the requested information within forty-eight (48) hours after the request has been made; otherwise, the bidder may be disqualified.

QCTO may conduct due diligence on any bidder, which may include interviewing customer references or other activities to verify a tenderer's other information and capabilities (Including visiting the tenderer's various premises and/or sites to verify certain stated information or assumptions). In these instances, the tenderers will be obliged to provide QCTO with all necessary access, assistance and/or information which QCTO may reasonably request and to respond within the given time frame set by QCTO.

The 80/20 principle will be applied in terms of the Preferential Procurement Policy Framework Act.

8.1. STAGE 1: MANDATORY REQUIREMENTS

During this stage, proposals will be reviewed to determine compliance with all mandatory requirements and such documents must be signed by a duly authorized representative.

I/We have attached to this document:	Tick if submitted		Office use
• Proof of company/closed corporation registration and a copy of CM/CK certificates	Yes	No	
• Copies of the identity documents of those with equity/shares	Yes	No	
• CSD Registration (National Treasury)	Yes	No	
• Letter of Good standing (COIDA) issued by Department of Labour	Yes	No	
• Letter of Accreditation proving status as an official SAGE partner with expertise in SAGE 300 and SAGE INTACCT	Yes	No	

Note: Failure to meet or submit any or all the above mandatory requirements will lead to bidder being disqualified.

8.2. STAGE 2: FUNCTIONALITY

Only service providers that qualified during the Mandatory Evaluation will be evaluated on functionality. At this stage, the evaluation process will be based on the service provider's responses in respect of their proposals against specifications and quality.

Qualifying proposal will be evaluated on the following:

No	Evaluation Criteria	Guideline	Scoring	Points
1	Relevant experience in installation, maintenance, and support of SAGE INTACCT and SAGE 300	Official reference letter from a client with the following: - Name of your business mentioned - Officially signed and dated with contactable details - Letters must be no older than 5 years	- Five References = 40 points - Four References = 30 points - Three References = 20 points - Two References = 15 points - One References = 10 points - No Reference = 0 points	40
2	Detailed CVs of key project personnel detailing their experience in SAGE 300 and SAGE INTACCT	Provide CVs of the following personnel: - Project Manager - SAGE 300 Certified Personnel - SAGE INTACCT Certified Personnel - Personnel with knowledge of analysing system, user requirements, and business processes	- Four or more personnel with relevant qualifications, certified in Sage Intacct– min 3 years and above experience and one or more personnel with Sage 300 experience – 3 years and above = 40 Points - Three personnel with relevant qualifications, certified in Sage Intacct– min 3 years and above experience and one or more personnel with Sage 300 experience – 3 years and above = 30 Points - Two personnel with relevant qualifications, certified in Sage Intacct– min 3 years and above experience and one or more personnel with Sage 300 experience – 3 years and above = 15 Points	40

No	Evaluation Criteria	Guideline	Scoring	Points
			Less than two appropriate personnel = 0 Points	
3	Methodology and Approach	Clearly detail the system analysis and system implementation methodology, including the data migration validation/verification approach that will be followed in the implementation and ongoing support for the required services, thus enabling prompt decision-making. As part of the approach include capacity building and skills transfer.	- An inclusive and detailed approach and methodology with timelines and skills transfer evident = 10 points - Only Methodology or Approach with timelines and skills transfer submitted = 5 points - No detailed methodology and approach submitted = 0 points	10
4	Change Management	A detailed change management plan provided. Such a plan must include training and communication plans.	Detailed Change management plan demonstrating understanding of the scope of work, expected milestones and good management = 10 points Detailed Project plan but does not demonstrate understanding of the scope of work = 5 points Plan not submitted or not detailed = 0 points	10
				100

Each criterion shall be assessed and scored on the evaluation sheet using the above points.

Threshold: Bidders who score less than **70** out of **100** points on functionality will not be considered for this project.

8.3. STAGE 3: PRICE AND SPECIFIC GOALS

Only bids that achieved the minimum qualifying score/percentage for functionality will be considered further in terms of the **80/20 preference point system**.

The formulae to be utilised in calculating points scored for the preference point system will be included in the tender document.

Step 1 will be the calculation of points for price where the lowest bid will score 80 points for price, while bids with higher prices will score lower points for price on a pro-rata basis.

The following formula will be utilised to calculate the points for price in respect of proposal with a Rand value below R50 000 000 (all applicable taxes included):

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

Where:

Ps = Points scored for comparative price of proposal or offer under consideration;

Pt = Comparative price of proposal or offer under consideration; and

Pmin = Comparative price of lowest acceptable proposal or offer.

Step 2 will be the calculation of points for the Specific goals contribution where 20 points will be awarded to a Bidder as per table below:

Specific goals	Definitions	Number of Points
Women	Points can be claimed by bidders who have owners/directors who are Black women 50% or more percentage of ownership = 5 Less than 50% percentage of ownership= 0	5
Youth	Points can be claimed by bidders who have owners/directors who are Black persons from the age of 16 to 35 50% or more percentage of ownership = 5 Less than 50% percentage of ownership= 0	5
Historically Disadvantaged Individuals (HDI)	Points can be claimed by bidders who have owners/directors that are Historically Disadvantaged Individuals, females or disabled South African person 50% or more percentage of ownership = 10 Less than 50% percentage of ownership= 0	10

Note: Failure to provide certification or affidavit substantiating the attainment of any of the Specific goals criteria will result in the Bidder being awarded zero (0) points for the Specific goal. In the case that B-BBEE certificates are used to substantiate the points, the bidder must submit the full verification report, which shows the percentage of Women, Youth and HDI ownership.

9. CALCULATING THE FINAL SCORE

The points scored for the price (step 1) will be added to the points scored for the Specific goals (step 2) to obtain the tenderer's total points scored out of 100.

AREAS OF EVALUATION	POINTS
Price	80
Specific Goals	20
Total	100

10. ACCEPTANCE OF PROPOSAL

QCTO does not bind itself to accept either the lowest or any other tender and reserves the right to accept the tender that it deems to be in the best interest of the organization. QCTO reserves the right to accept the offer in full or in part.

11. TENDER VALIDITY PERIOD

The validity period for this tender is 180 days.

12. ENQUIRIES

Contact person for technical enquiries regarding the terms of reference shall be directed in writing to:

Mr. Marco MacFarlane

Email: Macfarlane.m@qcto.org.za

Contact persons for SCM and administrative related issues:

Mr. Lekhotla Motlounq

Email: Tenders@qcto.org.za

