



**TERMS OF REFERENCE:**

**REQUEST FOR PROPOSAL FOR ERP SOFTWARE PROVISIONING, SOLUTION DESIGN, SET-UP AND CONFIGURATION, TESTING, TRAINING, DEPLOYMENT IMPLEMENTATION AND SUPPORT, AND MAINTENANCE FOR THE PERIOD OF FIVE YEARS**

**THE CONTENTS OF THESE TERMS OF REFERENCE ARE STRICTLY CONFIDENTIAL AND REMAIN SUBJECT TO THE NON-DISCLOSURE AGREEMENT. THE INFORMATION MAY ONLY BE USED FOR THE DEVELOPMENT AND PREPARATION OF THE PROPOSALS.**

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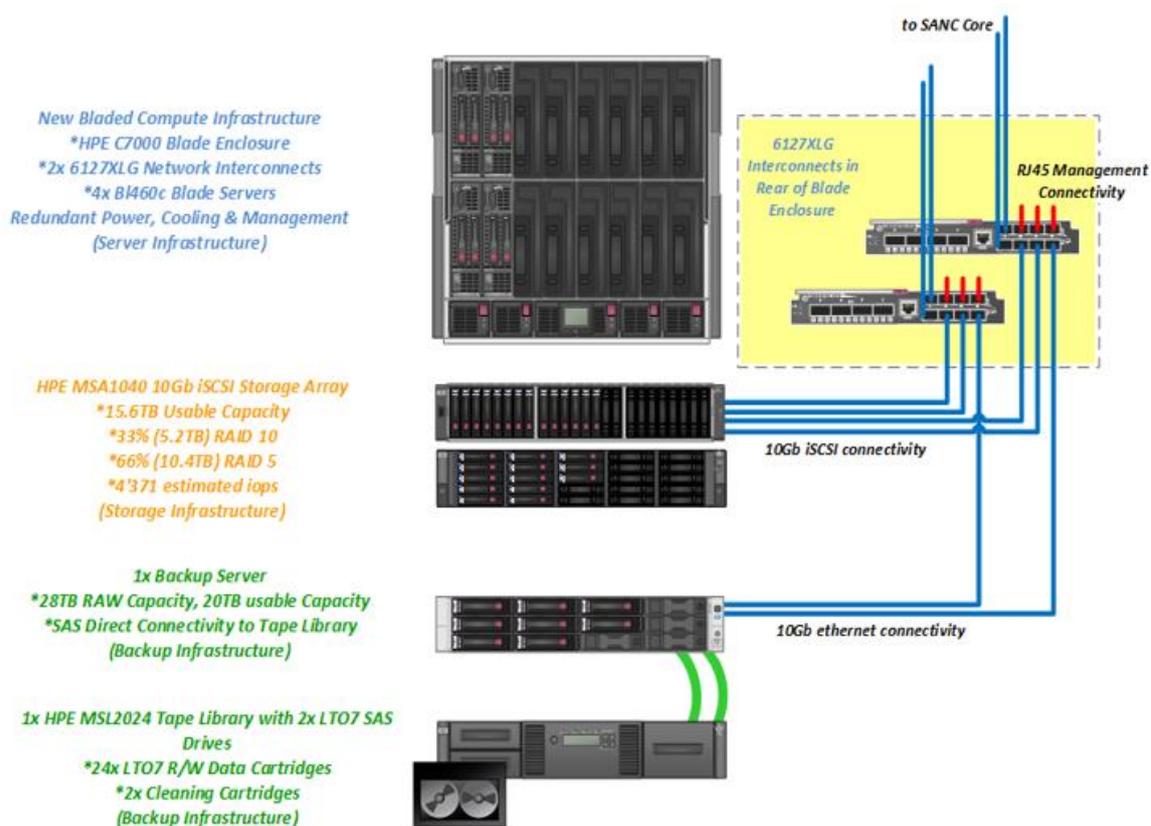
## 1. Background

The South African Nursing Council (SANC) is a body entrusted to set and maintain standards of nursing education and practice in the Republic of South Africa. It is an autonomous, financially independent, statutory body initially established by the Nursing Act, 1944 (*Act No. 45 of 1944*) and currently operating under the Nursing Act, 2005 (*Act No. 33 of 2005*).

The SANC embarked on an initiative to enhance, standardize, automate and integrate its core applications technologies. The selection and implementation of an internationally recognised Tier 2 Enterprise Resource Management (ERP) solution, from a local supplier, which complies with the SANC business and technology requirements is a key component of the initiative.

### 1.1. SANC Technology Background

The SANC information technology infrastructure on which the solution is to be deployed is reflected below.



The successful bidder solution must be compatible with the infrastructure as reflected above and the setting up and associated management of all required virtual environments (e.g. Configuration, Testing, Pre-Deployment and Production) and the related databases will be the responsibility of the successful bidder.

The proposed solution will need to be compatible with the following:

- Microsoft Windows Server 2016 *Data Centre edition*;
- Microsoft Sequel (SQL) Server Standard 2016;

- Microsoft Office 365 Cloud.

Any proposed system will be required to have the capability to integrate with the hosted Active Directory (AD) so as to ensure that a single user sign-on and password will be used within the SANC user community to access the required systems / solutions.

The current Local Area Network (LAN) is a 100 MBPS network but this will be upgraded to a 1 GBPS capability within the next 6 months. All users of the ERP will be internal to the ANC organisation, with very few users required to access the solution by making use of the Wide Area Network.

### 1.2. Data Source for Migration

The data sources for the initial migration of master data and transactional data currently reside in different systems /applications and other SANC specific data sources (spreadsheets and data repositories) as well as on hard copy documents in some instances. The data take-on preparation and testing will need to consider the challenges associated with the different data sources and it is anticipated that the data may in some instances not be complete or accurate. The key system repositories for data are:

- Accpac (versions thereof are not current)
- VIP Payroll
- SANC Supply Chain Management Bidder database

The following information is included to provide further guidance:

Application Description	Version	Operating System / Data Base
<b>AccPac Modules</b>	6.0 a (Latest version would be confirmed)	MS Windows Server 2008 / SQL 2005 (Latest operating system/Data Base would be confirmed)
<b>VIP</b>	Premium 4.4 a (Latest version would be confirmed)	MS Windows Server 2008 / SQL 2005 (Latest operating system/Data Base would be confirmed)
<b>ESS</b>	5.6.16.0 (Latest version would be confirmed)	MS Windows Server 2008 / SQL 2005 (Latest operating system/Data Base would be confirmed)

## 2. Purpose for Proposal

The key objective for this RFP is to procure, from a suitably qualified bidder, an internationally recognised Tier 2 or equivalent Enterprise Resource Planning (ERP) product offering; and its

related implementation, deployment as well as maintenance and support services capability and capacity.

This document seeks to outline, to the greatest extent possible, clarity with regard to the criteria or requirements of the South African Nursing Council that the proposed solution should meet.

The SANC recognises that bidders may wish to put forward submissions which include additional information not specifically requested for in this RFP. The SANC welcomes such creativity, but require that the RFP structure is strictly adhered to and that any “additional information” is reflected as a separate Appendix to the Bidder response.

“Quality over quantity” is paramount, and as such we request simple and succinct answers and information.

### 3. Business Drivers

SANC intends deploying an ERP product/solution which will assist the organisation in achieving the following:

- Compliance with best practice Finance management, Human Resources (including payroll) management and Supply Chain management principles;
- Scalability of product to align with future growth;
- Acceptable cost of ownership of product / solution;
- Flexibility pertaining to process definition and associated changes required post-implementation;
- Stakeholder access to all required / relevant data;
- The requirement for the solution / systems to incorporate / be updated with evolving best practices after consultation with the SANC; and
- Productivity and efficiency improvements (people, process and technology utilisation).

### 4. Key Objectives

The ERP product/solution must, among other requirements, provide, enable and promote the attainment of the following objectives:

- Improve productivity;
- Enable intuitive usability of the ERP solution;
- Centralised data repository with the capacity to enable seamless data integration with other core operational applications;

- Eliminate redundant manual tasks and processes by adopting automated data processing and risk management controls imbedded in the processes configurations;
- Standardise and simplify processes across multiple business units / functional areas;
- Improve the quality and reduce *time to complete* of processes associated with service delivery to internal and external stakeholders;
- Improve system security and compliance with regulatory governance requirements;
- Optimise the use of organisational assets (e.g. information technology infrastructure, printing infrastructure, network utilisation and end-user desktop equipment);
- Bolster inter-business unit collaboration relevant to data processing and reporting;
- Improve control and compliance with regulatory and policy requirements;
- Improve strategic and operational agility of the organisation to expand operational services rendered;
- Reduce organisational risk associated with the accuracy, timeous delivery and completeness of data processing and reporting;
- Improve accuracy and relevance of forecasting and reporting capabilities;
- Leverage increased business intelligence analysis capabilities; and
- Reduce complexities associated with the administration and maintenance of multiple functional applications.

## 5. Preferred Bidder Duties and Responsibilities

The preferred bidder will be expected to:

- Work with SANC to understand its business and specifically the function of the Human Resources management, Finance management and Supply Chain management business units. The solution design is to reflect the “to-be” processing, control and reporting requirements;
- Comply with the required deliverables as agreed and within the approved effort estimates;
- Conclude the assignment in a period of time as agreed upon/contracted;
- Provide only skilled, knowledgeable and experienced subject matter experts / specialists to be deployed at SANC;
- Provide technical guidance / subject matter expertise to SANC where required;

- Engage with the SANC Project Management Office on the status of all matters relevant to cost, schedule, quality, scope and other related matters during the execution of the assignment;
- Be available to commence and finalise the process of contracting with SANC within two (2) weeks of being informed of such a requirement by the SANC Supply Chain Management business unit;
- Commence with the assignment within four (4) weeks of a contract being awarded, subject to an agreement being entered into and Purchase Order being placed;
- Perform all work at the premises of the SANC at its Pretoria office, unless otherwise agreed to with the SANC;
- The bidder will provide all computing hardware, software, tools and other required equipment, including stationery, as may be required by the preferred bidder's project resources to perform their roles within the project; and
- Provide SANC with the details of at least five (5) most recent contactable references for similar completed assignments concluded at other clients during the past five to ten years.

## 6. Assignment Approach

- The SANC relies on the past experience and proven track record of the Bidder in completing / performing similar and successful assignments, to ensure that it provides the SANC with good practise advice, guidance and the required outcome.
- SANC will not be required to provide the successful bidder with any current process documentation. The emphasis of this assignment is to develop the "to-be" business requirements based upon good practises, and as such it is a requirement that the successful bidder will be able to provide SANC with resources who have the requisite knowledge and experience and tools relevant to the scope of work (requirements).
- The SANC requires that the Bidder be able to provide standard good practise process templates for all of the ERP processes, and that such templates will form the baseline to implement the system, unless changes thereto is required by SANC and updated by the Bidder accordingly.
- A detailed work plan and schedule, including effort estimates and a list of all deliverables will be agreed to during the contracting phase, prior to the issuing of an official SANC Order, but a proposed schedule with the supporting information must be included in the Bidder response for evaluation and consideration. Pricing will remain as per the bid proposal received.

- All project deliverables will require approval from the delegated SANC Representatives prior to it being regarded as completed.
- The SANC will endeavour to provide the successful bidder's resources with reasonable access to office infrastructure and access to the use of discussion rooms as well as access to the SANC LAN, subject to availability; and
- The SANC will reasonably assist the successful bidder with the scheduling of workshops and provisioning of related facilities, but it remains the responsibility of the successful bidder to ensure that it complies with the agreed to work plan and schedule, and as such the related administration remains the responsibility of the Bidder.

## 7. Requirements

### 7.1. Target Bidder and Software Specific Requirements

#### 7.1.1. Bidder Organisation Requirement

**Only Bidders who have a proven successful track record for the successful completion of related assignments during the past 5 to 10 years will be considered.**

**Only Bidders who are able to provide the full complement of the required skilled, knowledgeable and experienced resources in order to execute against the SANC requirements will be considered.**

The SANC, due to the nature of the organisational requirements, organisational structure and size, as well as process complexities and requirements for systems integration, requires that the Bidder is to provide a response in the respective evaluation section to each of the requirements listed below:

Bidder Profile Requirement Checklist:	Format For Reflecting Information Required
<ul style="list-style-type: none"> <li>• The Bidder provided proof or demonstrated history of having successfully completed similar project successes during the past 5 to 10 years (minimum 5).</li> <li>• The Bidder provided five reference letters (from different organisations) relevant to the successful completion of previous assignments of this nature during the previous 5 to 10 years.</li> <li>• The reference letters must be on the referee's letterhead and includes contact details of the client project owner / responsible person. SANC retains the right to contact any of the reference organisations as put forward by the Bidder so as to verify and discuss any related matters.</li> </ul>	Bidder Appendix to proposal

<ul style="list-style-type: none"> <li>• The Bidder included a brief description of the Bidder’s organisation (e.g. past history, present status, future plans, company size, etc.)</li> <li>• The Bidder submitted their reviewed or audited recent financial statements for the past three (3) completed financial years.</li> </ul>	
<ul style="list-style-type: none"> <li>• The successful Bidder will be required to guarantee the replacement of any resource which is deemed to be unfit to perform the function / role required, or whom is not available to the project for the period required, with an alternative resource with the equivalent knowledge, experience and qualifications and at no change in cost to the project and at no disruption to the project schedule.</li> </ul>	
<ul style="list-style-type: none"> <li>• All Bidder resources are to be certified by the OEM as experienced / knowledgeable subject matter resources, must have a minimum of 5 years of relevant experience (to the role being executed on the project) and must have appropriate and current industry related certification in areas of solution design and architecture, project management, system integration, testing and training as well as change management. This requirement is applicable to all Bidder proposed resources and includes, but is not limited to: <ul style="list-style-type: none"> <li>○ solution architecture design,</li> <li>○ project management,</li> <li>○ requirements gathering,</li> <li>○ gap analysis,</li> <li>○ solution design,</li> <li>○ technical design,</li> <li>○ solution configuration and integration,</li> <li>○ data conversion and take-on,</li> <li>○ testing and training,</li> <li>○ performance,</li> <li>○ functional and controls testing,</li> <li>○ deployment,</li> <li>○ post ‘go-live’ maintenance and support.</li> </ul> </li> </ul>	<p>Bidder Appendix to proposal to reflect the requisite OEM Accreditation / certification details of the resources as well as compliance with other requirements.</p>
<ul style="list-style-type: none"> <li>• Is able to substantiate that it has an established user support system and user support capability, as well as capacity and infrastructure; and associated processes.</li> </ul>	<p>Bidder Appendix to proposal</p>
<ul style="list-style-type: none"> <li>• Is able to substantiate its existing and continued presence within the Republic of South Africa and specifically within</li> </ul>	<p>Bidder Appendix to proposal</p>

the geographical proximity of the SANC, so as to enhance project execution and contribute to the successful conclusion and on-going support and maintenance requirements of the SANC.	
<ul style="list-style-type: none"> <li>Is able to substantiate the existence of an escalation capability to the product OEM for support and maintenance, should the Bidder not be able to provide the required maintenance and support services.</li> </ul>	
<ul style="list-style-type: none"> <li>Is able to provide proof that the Bidder is a current authorised reseller of the proposed ERP software / solution.</li> </ul>	Bidder Appendix to proposal
<ul style="list-style-type: none"> <li>Is able to provide proof that the Bidder is an authorised implementation partner / agent and product / functional support specialist for the proposed ERP software / solution for the OEM.</li> </ul>	Bidder Appendix to proposal

#### 7.1.2. Software Requirements

**The SANC will not consider any bespoke applications or solutions which are not recognised as leading Tier 2 ERP products / solutions by internationally acknowledged information technology advisory organisations (e.g. *Gartner*) within the South African and international software industry.**

#### 7.1.3. General Requirements

The following general requirements must be responded to by the Bidder:

##### 7.1.4. Scope of Professional Services Requirements

The following general requirements must be responded to by the Bidder:

Scope of Professional Services Requirements	Information Required (Minimum requirements)	Format for reflecting Information Required
<ul style="list-style-type: none"> <li>Provisioning of solution software (including all 3<sup>rd</sup> party software and firmware requirements)</li> </ul>	<p>The Bidder must provide a proposed contract proposal which clearly indicates:</p> <ul style="list-style-type: none"> <li>The terms of use of any software and tools;</li> <li>Licencing approach for all software and tools;</li> <li>Ownership of software and tools (depending on licencing approach);</li> <li>Software Assurance - Ongoing support fees for access to bug fixes, small</li> </ul>	Bidder Appendix to proposal

	<p>releases and major release upgrades as well as the anticipated future frequencies thereof;</p> <ul style="list-style-type: none"> <li>• Escrow arrangements whilst the project is in progress;</li> <li>• Confirmation that the Bidder is the legal owner of any software and tools deployed at the SANC site, and that the Bidder is unencumbered with regards to such software and tools;</li> </ul>	
<ul style="list-style-type: none"> <li>• Implementation services (an electronic copy of the project schedule is to be included in the proposal submission)</li> </ul>	<ul style="list-style-type: none"> <li>• The Bidder must provide an implementation plan in narrative format, supported by an activity-level project schedule (Level 4 minimum) using <i>Microsoft Project</i> and which details how the proposed solution is to be implemented. The implementation schedule is to reflect at least the following elements: <ul style="list-style-type: none"> <li>○ General implementation approach</li> <li>○ Project management approach</li> <li>○ Requirements definition and configuration / set-up</li> <li>○ List of deliverables</li> <li>○ Data conversion and migration</li> <li>○ Report development / customisation</li> <li>○ Change management</li> <li>○ Testing</li> <li>○ Training / knowledge transfer to SANC staff</li> <li>○ Pre “go-live” testing approach</li> <li>○ Other activities as deemed to be required by the Bidder</li> </ul> </li> <li>• The schedule is to be supported by detail pertaining to the type and number of resources, the resource experience in performing similar work (minimum 3 years required), the qualifications and certifications obtained (must include valid OEM certification relevant to the system / modules/ areas being allocated to non-technical resources, and technical</li> </ul>	

	<p>resources need to have a minimum of 3 years' experience and be appropriately qualified and certified in the related technology principles and related matters)</p> <ul style="list-style-type: none"> <li>• Include an organogram of the Bidder organisation which will be deployed to this project, and support this with the relevant role descriptions and Curricula Vitae of the proposed resources.</li> </ul>	
<ul style="list-style-type: none"> <li>• Maintenance and support services for a 5-year period</li> </ul>	<p>Proposed agreement which includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Post 'go live' support (on-site) to SANC for configuration and set-up (including process automation), interface issues, report development, network optimisation, user training and tips to optimise the user experience;</li> <li>• Help desk services (provide the associated service level agreement);</li> <li>• Toll-free support line;</li> <li>• Telephone support;</li> <li>• Implementation support for OEM 'bug' fixes;</li> <li>• Implementation support for OEM minor and major releases;</li> <li>• Access to solution User Groups and Special Interest Groups (SIG's) – provide information as to the existence of such interactive opportunities and method of participation);</li> <li>• Online knowledge base (provide details as to the method to access information and the administrator responsibilities therefor).</li> </ul>	<p>Bidder Appendix to proposal</p>
<ul style="list-style-type: none"> <li>• Definition and documentation of: 'to-be' detailed business requirements.</li> </ul>	<p>Provide an example of a populated BRD.</p>	<p>Bidder Appendix to proposal</p>

<ul style="list-style-type: none"> <li>• Definition and documentation of detailed 'to-be' functional solution design.</li> </ul>	Provide an example of a populated FDDD.	Bidder Appendix to proposal
<ul style="list-style-type: none"> <li>• Definition and documentation of detailed 'to-be' technical design.</li> </ul>	Provide an example of a populated TDD.	Bidder Appendix to proposal
<ul style="list-style-type: none"> <li>• Data conversion and data take-on (Bidder to provide any software and tools required for data preparation, take-on and quality validation and pricing, as well as related terms and conditions; and ownership is to be clearly reflected separately).</li> </ul>	<p>The Bidder must provide the documented data conversion and take-on approach and plan (including quality approach and software requirements).</p> <p>The utilisation of specialised tools / software is to be clearly stated and all associated information is to be reflected in the 'Provisioning of Solution Software' section above.</p> <p>The recommended approach for <i>legacy data</i> in respect of data retention is to be included in the response.</p>	Bidder Appendix to proposal
<ul style="list-style-type: none"> <li>• Configured and documented ERP / solution.</li> </ul>	<p>Provide documented proposed approach, process and quality control framework.</p> <p>Clearly indicate requirement for resourcing support required from SANC.</p> <p>Provide an example of a populated configuration document.</p>	Bidder Appendix to proposal
<ul style="list-style-type: none"> <li>• Testing of configured ERP solution (unit testing, integration testing, performance / stress testing and user acceptance testing).</li> </ul>	<p>The Bidder must provide the documented proposed approach, process and quality control framework.</p> <p>The utilisation of specialised testing tools / software are to be clearly stated and all associated information is to be reflected in the 'Provisioning of Solution Software' section above.</p> <p>Provide an example of a populated unit test plan, an integration test plan and performance /stress testing plan.</p>	Bidder Appendix to proposal
<ul style="list-style-type: none"> <li>• Training of System Administrators,</li> </ul>	The Bidder must provide the document describing the approach and quality control	Bidder Appendix to proposal

<p>Super Users and End-Users.</p>	<p>framework, with emphasis on knowledge transfer determination.</p> <p>Any requirements which the bidder may have for the SANC to provide facilities, consumables and equipment are to be clearly stated.</p> <p>Clearly differentiate between Bidder responsibility for SANC staff training and a 'Train the Trainer' knowledge transfer approach and related responsibilities.</p> <p>Technical implementation training will be required for two (2) SANC staff members.</p> <p>Approximately 40 end users of the ERP will require training on the various processes and at least four (4) subject matter experts are to be trained for the Finance, Human Resources and Procurement areas.</p> <p>The Bidder will be required to provide all users (end users, system administrators, IT support and super users) with updated user manuals during the performance of the testing, and the Bidder is to provide clarity as to:</p> <ul style="list-style-type: none"> <li>- What documentation will be provided and in what format.</li> </ul>	
<ul style="list-style-type: none"> <li>• Transition / 'go-live' planning.</li> </ul>	<p>Provide the documented approach and quality control framework. Clarity with regards to the estimated transitioning time frame is required.</p>	<p>Bidder Appendix to proposal</p>
<ul style="list-style-type: none"> <li>• Definition and documented Standard Operating Procedures (SOPs).</li> </ul>	<p>Provide an example of a significantly complex documented SOP.</p> <p>The Bidder staff will be responsible for the finalisation of all SOPs required for the proposed solution.</p>	<p>Bidder Appendix to proposal</p>
<ul style="list-style-type: none"> <li>• Three month post implementation support (including resolution of 'gap-list').</li> </ul>	<p>Provide a document with the proposed approach describing objectives, quality control framework and description of services and support during this period.</p> <p>It must be noted that any project 'snag lists' will not be considered to be part of the maintenance and support contract post-'solution implementation', and that it is a</p>	<p>Bidder Appendix to proposal</p>

	<p>requirement that the project team will continue to deliver support to the SANC to resolve any issues which were either not identified during implementation or which were of such minor nature that it did not impede deployment to production during this three-month period.</p> <p>The Bidder is to confirm that the project manager and all required staff which are needed to resolve the project 'snag list' will be available for the 3-month period and that such cost is included / provided for in the implementation fee.</p>	
<ul style="list-style-type: none"> <li>• Project Management</li> </ul>	<p>The Bidder must provide the Bidder's documented project management approach, methodology, templates and planned deliverables. It is to be noted that SANC uses <i>Microsoft Project 2013</i> in its PMO. The Bidder is to provide an experienced project manager whom will work closely with, and as a team member of the SANC PMO in all matters pertaining to the project.</p>	<p>Bidder Appendix to proposal</p>
<ul style="list-style-type: none"> <li>• Data conversion and migration services</li> </ul>	<p>The Bidder will be responsible to ensure that all legacy data on the current SANC solution(s) are converted and migrated and that the integrity of such data is assured. The bidder is to provide an indication as to the electronic and manual migration approach it intends adopting for this project. The Bidder will assume absolute responsibility for data-scrubbing, pre-preparation and all coordination thereof, and the definition of file layouts and the data import and post-migration verification are to be executed by the Bidder.</p> <p>A data retention strategy is also to be developed and agreed with the SANC.</p>	<p>Bidder Appendix to proposal</p>
<ul style="list-style-type: none"> <li>• Report development</li> </ul>	<p>The Bidder will be responsible for the development of any / all customised reporting requirements, as it is anticipated that the tier 2 product should have comprehensive reporting and analytical</p>	

	<p>capabilities which should accommodate the SANC requirements.</p> <p>The Bidder must provide a description of the various methods of reporting, including Business Intelligence.</p> <p>The Bidder must describe the methods and approach that it will implement to identify, specify, develop, test and approve custom reports during the implementation.</p>	
<ul style="list-style-type: none"> <li>• Change management</li> </ul>	<p>The Bidder should clearly identify its approach to change management, including unique approaches, processes or tools that will be used.</p>	

## 8. Sub-Contracting

The allocation of any work, irrespective of the scope thereof, to a sub-contractor of the Bidder will need to be approved by SANC. SANC will at its own discretion ratify the appropriateness of the sub-contractor to be used by any successful Bidder.

The Bidder is to declare any intended use of any sub-contractor and provide full details pertaining to the sub-contractor organisation, including CVs of proposed staff to be used. The Bidder also needs to declare the extent of the work that will potentially be performed by any sub-contractor, both in terms of monetary value and time / effort consumed.

No bidder will be awarded any B-BBEE status recognition for any portion of work exceeding 25% of the work if such work is outsourced to a sub-contractor/enterprise that does not qualify for at least the same number of points that the bidder qualifies for, unless the intended sub-contractor is an Exempted Micro Enterprise that has the capability and ability to execute the sub-contract. Thus, any work contracted to a sub-contractor(s), should it exceed 25% of the work, will not be qualify for the awarding of B-BBEE points unless the sub-contractor also qualifies for the same number of points as the Bidder, unless the sub-contractor is an Exempted Micro Enterprise that has the demonstrated capability and ability to execute the sub-contract.

## 9. Contracting, Pricing, Resourcing and Planning

The Bidder pricing is to be quoted in South African Rand (ZAR) only as per the rand value against the foreign currency as published by SARB by 12 am on the date of the advertisement of the tender.

9.1. Proposed Pricing

Bidders must ensure that all prices quoted are inclusive of VAT and/all other applicable taxes for all prices quoted – it will be assumed that all prices quoted are in compliance thereof.

Project Costing								
<b>1. Provide the following cost information (please reflect information in a table format and ensure that information is provided with adequate granularity to allow for evaluation)</b>	<ul style="list-style-type: none"> <li>• <b>Software licence cost</b> <ul style="list-style-type: none"> <li>○ By product if applicable (including 3rd party software and tools)</li> <li>○ Specify licence type(s)</li> </ul> </li> </ul>							
	<b>Product Name / description</b>	<b>Licence Type Description (Type of licence &amp; provide volume based discount models if applicable)</b>	<b>Unit Cost per annum</b>	<b>Y 1</b>	<b>Y 2</b>	<b>Y3</b>	<b>Y4</b>	<b>Y5</b>
				<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>
	e.g. Product A	e.g. User based	e.g. R 5-00 per named user					
	<ul style="list-style-type: none"> <li>• <b>Annual software support cost</b> <ul style="list-style-type: none"> <li>○ Access to bug fixes, minor releases and major releases (if applicable)</li> <li>○ By product if applicable (including 3<sup>rd</sup> party software and tools)</li> <li>○ Provide an hourly rate or indicate if it is a fixed annual rate, or how it is calculated if otherwise determined</li> </ul> </li> </ul>							
<b>Product</b>	<b>Unit of Measure</b>	<b>Unit Cost per annum</b>	<b>Y1</b>	<b>Y 2</b>	<b>Y3</b>	<b>Y4</b>	<b>Y5</b>	
		e.g. R 5-00 per applica	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	

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			tion or tool					
	e.g. Product A	e.g. Annual	e.g. R 5-00 per application or tool					
	<ul style="list-style-type: none"> <li>General Support cost fees (Support required which is not within ambit of Maintenance and Support Agreement) <ul style="list-style-type: none"> <li>Specify an hourly rate</li> <li>Provide a description of the service included in the support that is being provided</li> <li>List all service types that you will be able to deliver / deem to be required</li> </ul> </li> </ul>							
	<b>Type of service</b>	<b>Unit of Measure</b>	<b>Price per Unit</b>					
	e.g. Product A	e.g. Hourly	e.g. R 5-00					
	<ul style="list-style-type: none"> <li><b>Other:</b> <ul style="list-style-type: none"> <li>Clearly state if there are any other costs which will need to be considered and the basis for the calculation of such costs</li> </ul> </li> </ul>							

**2. Labour / Professional services costs (please reflect information in a table format)**

- Provide the average hourly rate per consultant/role type who will be involved in the service, the total planned hours and the total cost (VAT inclusive)
- Ensure that the hourly rate/cost is inclusive of all travel, accommodation, incidental and subsistence costs

**The table format as indicated hereunder is to be used.**

Consulting costs (hourly rates) are to be inclusive of VAT and need to be inclusive of all other associated costs.

Provide the information against each entry in the 'Professional Services Name / Description' column below.

<b>Professional Services Name / Description</b>	<b>Average hourly consulting rate</b>	<b>Effort Estimate (Hours)</b>	<b>Total Cost</b>
<b>Project management</b>			

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<p><b>Implementation services:</b></p> <ul style="list-style-type: none"> <li>• <b>Setting up of project environments on SANC infrastructure and including the required software/applications deployment:</b> <ul style="list-style-type: none"> <li>○ <b>Development</b></li> <li>○ <b>Testing</b></li> <li>○ <b>Training</b></li> <li>○ <b>Staging (pre-‘go live’)</b></li> </ul> </li> <li>• <b>Requirements definition</b></li> <li>• <b>Functional design</b></li> <li>• <b>Technical design</b></li> <li>• <b>Configuration</b></li> <li>• <b>Data preparation and migration</b></li> <li>• <b>Change management</b></li> <li>• <b>Report development</b></li> <li>• <b>Testing</b></li> <li>• <b>SOP Documentation</b></li> <li>• <b>Training</b></li> <li>• <b>Deployment to production</b></li> </ul> <p><b>(The above is to include the 3 month post-implementation support)</b></p>			
<p><b>Escrow costs (to be the cost associated for the planned duration of the implementation)</b></p>			
<p><b>Other (Please list in separate lines)</b></p>			
<p><b>3. Maintenance and Support for 5-year period</b></p> <ul style="list-style-type: none"> <li>• <b>Provide the annual cost</b></li> </ul>			

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- Ensure that the rate/cost is inclusive of all travel, accommodation, incidental and subsistence costs

The table format as indicated in the next lines are to be used.

Costs (hourly rates) are to be inclusive of VAT and need to be inclusive of all other associated costs

Maintenance and support description  (Include detailed description of the maintenance and support services scope of work or reference to a specific Addendum in the Bidder response)	Annual Cost (VAT inclusive)					
	Y1	Y2	Y3	Y4	Y5	Total
	Fixed Cost	<ul style="list-style-type: none"> <li>• Cost</li> <li>• List cost drivers to be considered for annual increases</li> </ul>	<ul style="list-style-type: none"> <li>• Cost</li> <li>• List cost drivers to be considered for annual increases</li> </ul>	<ul style="list-style-type: none"> <li>• Cost</li> <li>• List cost drivers to be considered for annual increases</li> </ul>	<ul style="list-style-type: none"> <li>• Cost</li> <li>• List cost drivers to be considered for annual increases</li> </ul>	

- The SANC will not consider time and materials pricing. Bidders shall provide firm and fixed pricing based on the requirements described.
- The Bidder shall provide price information as per the requirement above as well as the costs of any modifications necessary to fully comply with the RFP requirements (this information is to be included in the same Annexure as the other pricing information).
- In the event the product or service is not being included in the Bidder proposal, the item should be noted as "No Bid".
- Bidders shall provide prices in South African Rand and must be inclusive of Value Added Tax (VAT).
- Bidders shall clearly indicate the additional cost of optional elements (this information is to be included in the same Annexure as the other pricing information).

## 10. Assumptions

### 10.1. Users and other

- Named users for the Finance functions ± 40

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- Named users for the Human Resources functions ± 10
- System administrators ± 2
- Staff members (Payroll) ± 143
- Number of creditors ± 150
- Number of contract staff on payroll ± 40
- Number of temporary staff on payroll ± 1310
- Councillors on payroll ± 25

**10.2. Implementation scope**

- Standard reports
- 30 Customised Reports
- 10 Dashboards
- 20 upload files
- All processes and sub-processes as indicated in Functional Requirements section (although not limited thereto).
- Technology deployment is to be aligned with the technology architecture as described in the Technology Background section.
- Implementation to preferably not exceed six (6) months in total (Full 'life cycle' implementation culminating in commencement of post- implementation support).

**11. Proposed conditions of contract**

**11.1. Fee Retention and Guarantee**

SANC will require that a minimum of 10% of the implementation fee, for deliverables completed / milestones achieved, be retained for a period (minimum 3 months) to be agreed to between the parties after the successful implementation of the solution and/or the resolution of all implementation related 'snags' and issues, for which the resolution thereof is the responsibility of the successful Bidder.

**11.2. Payment Approach**

The following pricing related conditions will be applicable:

The successful Bidder will be required to provide a fixed price submission for professional services. Prices for the first twelve months for 'other services' thereafter are to be adjusted according to the CPI or any other market variables, provided that there are supportive facts.

- Payments will be made 30 days after 'statement date', based on a valid and accurate tax invoice, and is based upon the SANC PMO approval of deliverables being obtained.

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- SANC intends to apply a milestone-based payment approach for the implementation and related services rendered by the successful Bidder. A payment milestone schedule will be agreed between SANC and the successful Bidder during the contracting phase. SANC will require a warrant from the Bidder, guarantee that the implementation, to the extent that the Bidder influences the implementation period, will be completed within the time period agreed to.

**11.3. Assignments**

Any Agreement or any part thereof entered into shall not be assigned or subcontracted by the successful Bidder without the prior written permission of the SANC; any attempt to do so without said prior permission shall be void and of no effect.

The successful Bidder agrees not to assign, transfer, convey, sublet, or otherwise dispose of any Agreement or any rights, title, or interest created by any Agreement without the prior consent and written approval of the SANC.

**11.4. Project Schedule and Acceptance**

The successful Bidder will develop a detailed Project Schedule that details both the successful Bidder and SANC's responsibilities. The Project Schedule should be in sufficient detail to specify, but not be limited to, the set-up, configuration, training, testing, acceptance, migration, change management and 'go-live' operation activities. Both the successful Bidder and SANC agree that a mutually agreeable Project Schedule will be submitted to and approved by the SANC prior to the commencement of the project and the finalisation of the contract. In the event that the successful Bidder is unable to provide the Project Schedule timeously, SANC will have at its option, the ability to terminate the proposed Agreement or withdraw its intention to enter into an Agreement with the successful Bidder.

**11.5. Conflict of Interest**

The Bidder shall not employ as a director, officer, employee, agent, or subcontractor any elected or appointed official of the SANC or any member of his/her immediate family.

**11.6. Intellectual Property**

All information, data, programs, publications and media created specifically for and paid for by the SANC or as a result of the work identified in any Agreement is the property of the SANC unless otherwise noted, copyright protected, or defined or agreed to by both parties to any Agreement.

**12. BID Validity Period**

The validity period for your submission to this RFP shall be 120 days from the closing date of the Bid / RFP and may be extended by mutual agreement.

**13. Software Escrow**

It must be noted that SANC will require that, if a bidder is contracted for the provision of any software, it will be a requirement to enter into an Escrow agreement with SANC. The Escrow

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agreement will substantially address matters pertaining to, but not be limited to, the Bidder substantially ceasing trading, the Bidder breaching terms of a license or support agreement, Change of ownership or structure at the Bidder, and Bidder discontinuing or reducing development and support of the software to the extent that it constitutes a risk to SANC.

#### **14. Awarding Of Bids**

- SANC is not compelled to accept any of the proposals and reserves the right to negotiate further with none, one or more Bidders;
- SANC is under no obligation to provide reasons for rejecting proposals;
- SANC will not be required to inform Bidders in writing if they are unsuccessful;
- Bids received after the closing date and time will not be considered and will be disqualified;
- No contract may be awarded to a Bidder who has failed to submit an original Tax Clearance Certificate from the South African Revenue Services ("SARS") certifying that the taxes of that entity/person are in order or that suitable arrangements have been made with SARS;
- Where it is discovered that an advantaged Bidder used a disadvantaged person, as a 'front' to acquire a Bid, such Bidder will be disqualified and the Bid shall be withdrawn;
- The successful Bidder, in the event that SANC decides to appoint a Bidder, will be required to make all required resources available to finalise and enter into a contract with SANC within a maximum period of 3 weeks after being informed of such appointment. The successful Bidder will be notified in writing of such a requirement.
- The Bidders will be required to, upon request from SANC, arrange a demonstration of the proposed solution and divulge other required information; and
- The Bidders are required to arrange for access to any reference sites and/or client references during the first month after the submission closing date.

The successful Bidder organisation must have the capacity and capability to allocate only resources which have the requisite breadth and depth of skills, knowledge and experience to assist the organisation with the responsibilities as reflected above. The successful Bidder organisation must be able to provide SANC with business analyst resources whom have a good knowledge and understanding across the various process areas of Human Resource management, Finance management and Supply Chain management as it is generally incorporated in Tier 2 Enterprise Resource Management software solutions.

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**15. Desired Confidentiality Terms and Conditions**

- The successful Bidder should strictly treat all SANC’s information with a high degree of confidentiality;
- The SANC’s information should not be provided by any means to a third party.

**16. Evaluation Process**

Bids will be evaluated in four steps (Administrative Compliance, Technical Mandatory Criteria, Functional Criteria, Price and B-BBEE).

The following qualifying criteria will be used:

**16.1. Step 1: Administrative Compliance**

- Proof of tax compliance status e.g. valid tax clearance certificate or personal identification number (PIN) issued by SARS.
- Proof of Accredited OEM partnership (accreditation letter for software reseller, implementation and support & maintenance).
- Certificate of Intellectual Property and Commission (CIPC) Registration from the Department of Trade and Industry.
- Copies of the last three (3) years’ audited or reviewed annual financial statements.

**16.2. Step 2: Technical Requirements:**

The technical requirements below are mandatory and therefore only bidders who comply with all these requirements will be evaluated further for functionality, pricing and B-BBEE.

<b>Human Resources Management</b>			
▪ Human Resources Planning			
▪ Job Analysis, Job Profiling & Job Evaluation			
▪ Human Resources Administration management			
▪ Payroll management			
▪ Recruitment and Selection management			
▪ Training and Development management			
▪ Workforce Planning management			
▪ Human Resources Audit & Risk			
▪ Performance management			
▪ Labour Relations management			
▪ Employment Equity & Diversity			
▪ Talent management			

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<ul style="list-style-type: none"> <li>▪ Succession Planning and Career Path management</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Organisational Development</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Reporting</li> </ul>			
<p><b>Finance and Supply Chain Management Modules</b></p>			
<ul style="list-style-type: none"> <li>▪ <b>Procurement</b> - minimum of Requisitioning, Ordering, Contract Management, Procurement Planning (Linked to Capex), Detailed reporting (hard and soft copy), bid evaluation and bid adjudication management with capability to store related documents on-line, Validation of orders against approved Capex and Opex funding availability, Supplier master data maintenance, Contract management and reporting</li> </ul>			
<ul style="list-style-type: none"> <li>▪ <b>Stores / Inventory</b> - minimum of variable product and / or service pricing, Receiving, Stock location management, Advanced order picking capabilities, Stock location management (multi-warehouse and bin management), Auto re-order (Min/max stock levels), Variable stock count methodologies, Stock master data maintenance, Detailed reporting (hard and soft copy), Returns Management, GRN / GRV, Variable stock counting methodologies, Product bar coding and scanning integration capability, Automatic invoicing, Variable dispatch process management capabilities, Procurement lead time management, Ability to apply variable discounting, Returns management receiving, stock counting approaches, stock master data maintenance, GRV and GRN)</li> </ul>			
<ul style="list-style-type: none"> <li>▪ <b>Management Accounting</b> - ERP system requirements for Management accounting to cover: Product/Service Costing, Responsibility Centre Reporting, Analysis for decision making, Budgeting and Master Data</li> </ul>			
<ul style="list-style-type: none"> <li>▪ <b>Financial Accounting</b> - Advanced Debtors management, Detailed reporting (hard and soft copy), Accounts Payable, Fixed Assets Management, Cash Management, General</li> </ul>			

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Ledger, Accrual accounting (automatic and manual), Journal processing (automatic and manual)			
▪ <b>Sales</b> - Integration with POS systems, Product management, Invoicing, Dispatch Management, Sales Order processing (automated), Detailed reporting (hard and soft copy)			
▪ <b>CRM [Customer Relationship Management]</b> - Ability to manage client profiles, Integration with 3rd party software, Vendor management			
▪ <b>Facilities</b> - Activity Management & Planning (scheduling), Integration to stock and stores management, Requisitioning, Detailed reporting (hard and soft copy), Service Desk / calling capability, On-line inspection reporting (Link to activity planning and Service desk)			
▪ <b>Accounts Payable</b> - Supplier master data maintenance, Automated and manual payment scheduling, Auto Reconciliation (Bank accounts / Other 3rd party data), Auto upload of bank statements, Multiple bank account management and automated reconciliation, Setting up and processing of standard journals, Automated accrual accounting			
▪ <b>Grant or Project accounting</b>			
▪ <b>Advanced asset management and variable depreciation capabilities</b> - Automatic / systems journals for depreciation, Maintenance scheduling alerts, Asset non-availability statistics, Warranty management control and alerts			
▪ <b>Payroll management</b> - Employee Management, Attendance Management, Employee TA/DA management, Overtime management, Payroll cost center management, Leave management, Employee allowances management, Advanced reporting, Loan Term & Conditions			

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management, Employee allocation management against approved structure			
<ul style="list-style-type: none"> <li>▪ <b>Accounts Receivable</b> - Detailed age analysis capability, Automated reminders and SMS / e-mail integration</li> </ul>			
<ul style="list-style-type: none"> <li>▪ <b>Facilities management</b> - Incident reporting, Maintenance scheduling, Cost management and reporting, Resource planning, Planning reminder events</li> </ul>			
<b>General:</b>			
<ul style="list-style-type: none"> <li>▪ Advanced data analytical and BI capabilities</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Advanced planning, budgeting and forecasting capabilities (multi-dimensional and multi-period)</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Multi-level entity structure and chart of accounts configuration capabilities</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Ability to import journal transactions</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Advanced journal processing capabilities</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Multiple stakeholder system approval management (e.g. orders, payments, returns, journals)</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Advanced reporting capabilities (standard reporting or user defined reporting in hard and soft copy)</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Advanced event logging and user permission management</li> </ul>			
<ul style="list-style-type: none"> <li>▪ Capability to send messages via SMS or email to defined recipients</li> </ul>			
<b>Software Requirements (Bidder Appendix to proposal)</b>			
<ul style="list-style-type: none"> <li>• The proposed ERP must be a recognised market leader Tier 2 ERP product / solution and be acknowledged accordingly by an information technology advisory organisation</li> </ul>			

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<p>within the South African and international software industry (e.g. Gartner).</p>			
<ul style="list-style-type: none"> <li>• The proposed ERP software solution must have an established national and international client and user footprint (number of organisations and number of users):             <ul style="list-style-type: none"> <li>• The Bidder must provide the SANC with the ERP client and end-user information which supports the national footprint for both the product clients and users as well as the Bidder’s own ERP client base for the proposed solution (with specific emphasis on the South African region).</li> </ul> </li> </ul>			
<ul style="list-style-type: none"> <li>• <b>The solution must have the capabilities to comply with the SANC’s key objectives:</b> The Bidder is to provide case history examples of how this was achieved at its previous clients.</li> </ul>			
<ul style="list-style-type: none"> <li>• <b>The Bidder must declare all components of the proposed solution that are proprietary to the Bidder or its subcontractors.</b></li> </ul>			
<b>Technology / Solution Architecture Requirements (Bidder Appendix to proposal)</b>			
<p><b>Solution Architecture</b></p> <ul style="list-style-type: none"> <li>• The Bidder must provide a detailed schematic of the solution (product) design, showing layers of the architecture of all components and the relationships;</li> <li>▪ Detailed description of each component and each integration/relationship.</li> </ul>			
<p><b>Configuration Architecture</b></p> <ul style="list-style-type: none"> <li>• The Bidder must provide a schematic and/or description of the tools that will be used to configure the different components of the solution. Distinguish between tools specifically for configuration of the (1) user interface, (2) application logic and (3) database layers of the proposed solution architecture.</li> <li>• The Bidder must provide for each tool a description of the purpose and functionality of any / all tools that will be used to</li> </ul>			

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<p>configure and deploy the proposed solution to meet the SANC requirements.</p>			
<p><b>Deployment Architecture:</b></p> <ul style="list-style-type: none"> <li>The production application and other required environments will be deployed at the SANC premises on the SANC Information Technology infrastructure as described in the <i>Technology Background</i> section. The Bidder must provide a schematic and description of the required deployment architecture for your solution. This should include detail on servers, storage and network requirements. Alternative designs can be provided and motivated.</li> </ul>			
<p><b>Development Practices:</b></p> <ul style="list-style-type: none"> <li>The Bidder must provide a detailed description of the solution support structures and processes that exist within your organisation; the product development lifecycle and process followed to enhance the product; the product release strategy, approach and time schedule specific to ‘bug fixes’, minor product releases and major product releases; the service level agreement standards.</li> </ul>			
<p><b>Information Architecture Model:</b></p> <ul style="list-style-type: none"> <li>The Bidder must provide the proposed information architecture / model (preferably using <i>PowerPoint</i> or <i>Visio</i>) and must include the: Data models, Taxonomy, Data elements, Coding structures, Approach to standardising on a particular coding structure (if applicable), Data definitions.</li> </ul>			
<p><b>Operating &amp; Data base Software compatibility:</b></p> <ul style="list-style-type: none"> <li>The data base is able to run on <i>Microsoft SQL 2016</i>, the application / solution is compatible with the <i>Microsoft Windows Server 2016</i> operating system.</li> </ul>			

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<p><b>End-User Computing Requirements:</b></p> <ul style="list-style-type: none"> <li>The Bidder must provide a detailed specification of the end-user desktop computing device minimum requirements (desktops and laptops) and clearly indicate the minimum requirements for usability of other handheld devices (Smart Phones and Tablets) and which can be used to access the solution.</li> </ul>			
<p><b>Workflow Capability:</b></p> <ul style="list-style-type: none"> <li>The ERP must have an extensive work flow automation design capability. The Bidder is to provide a detailed description of the associated capability and provide information as to the process flow tool/application which is used.</li> </ul>			
<p><b>Database:</b></p> <ul style="list-style-type: none"> <li>The proposed solution must have a unified database and which is the source for the reporting system. The Bidder is to provide a detailed overview of the reporting capabilities, including the setting up of information dashboards and the customisation / report tool writer applications which can be used.</li> </ul>			
<p><b>Integration:</b></p> <ul style="list-style-type: none"> <li>SANC requires that the proposed ERP solution must have standard industry ERP aligned integration capabilities with other 3rd party software – the Bidder to provide a clear and detailed description of the solution capabilities.</li> </ul>			
<p><b>Hardware, Storage and Software Design and installation:</b></p> <ul style="list-style-type: none"> <li>The Bidder is to provide the required resources to work with the SANC Information Technology team to deploy any software and databases and perform other associated</li> </ul>			

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<p>activities. The Bidder is to confirm that its team composition caters for this requirement.</p>			
<b>General Requirements (Bidder Appendix to proposal):</b>			
<p>The proposed ERP solution must be accompanied by a complete set of configurable, out-of-the-box best practices (process, sub-process, system and manual controls, reports and automation / workflow capabilities) and the Bidder is to provide detailed supporting information.</p>			
<p>The proposed ERP must be compatible with the South African regulatory requirements for the Human Resources management, Finance management and Supply Chain management reporting and controls requirements. The Bidder is to clearly state that all of the software products and best practise processes it intends implementing at the SANC comply with the regulatory requirements of the Republic of South Africa. Any non-conformance is to be specifically noted, and recommendations as to possible solutions therefor are to be included in this section of the response.</p>			
<ul style="list-style-type: none"> <li>• The SANC requires an accelerated / short ERP implementation time frame. <ul style="list-style-type: none"> <li>○ Provide clarification on how your organisation is able to achieve this and the environmental and other requirements which are needed to achieve a rapid implementation time frame.</li> <li>○ Provide a high-level work plan for achieving the successful deployment of the proposed solution.</li> </ul> </li> </ul> <p>It is a requirement that the Bidder provides / resource the initiative with a Project Manager who will work closely with the SANC PMO.</p>			

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<p>The Total Cost of Ownership (TCO) is a critical business driver for SANC - provide information as to why the proposed TCO of the proposed ERP and support services are an acceptable proposition to SANC? All elements of the TCO that the SANC may incur need to be specified in the response for a five-year period. The TCO values and descriptions are to be tabled in a format that clearly differentiates between the various elements thereof and the associated annual cost thereof for a five-year period.</p>			
<ul style="list-style-type: none"> <li>• General implementation approach: <ul style="list-style-type: none"> <li>○ The Bidder is to provide information related to the suggested process to be followed to transition from the 'sales cycle' to the commencement with the project implementation and other related activities.</li> <li>○ The Bidder is to describe key differentiators in terms of the proposed implementation approach, as it relates to implementing the proposed solution on time, within budget, in accordance with quality expectations, with minimal requirements for change in scope of work and meeting the diverse requirements of SANC.</li> </ul> </li> </ul> <p>The Bidder is to provide a definitive description of the (if any) implementation phasing of the solution components / capabilities.</p>			

**16.3. Step 3: Functional Evaluation**

Only those bidders who meet the functional threshold of 80 points for each of the compliance category sections out of a total 100 points will be evaluated further.

Bidders will be scored in accordance with the following matrix:

<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Very good</b>	<b>Excellent</b>
1	2	3	4	5

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The following formula will be used to convert to the points scored against the weight:

$$P_s = \left( \frac{S_o}{M_s} \right) \times 100$$

Where:

Ps = Percentage scored for requirements compliance by bid under consideration

So = Total score of bid under consideration

Ms = Maximum possible score

Criteria	Weight	Sub Criteria	Sub-Weighting
Approach and Methodology	25	The bidder must fully describe and demonstrate proposed software and solution. The proposed solution must meet all ERP requirements of SANC.	10
		The bidder must demonstrate the Approach, Methodology and Plan (AMP), (including a detailed phased-in implementation plan with testing schedules) to be adopted during the implementation, hosting and execution of the ERP during the duration of the contract. The AMP must be linked to the deliverables and scope of work as per Section 2 of the TOR.	15

**TERMS OF REFERENCE: REQUEST FOR PROPOSAL FOR ERP SOFTWARE PROVISIONING, SOLUTION DESIGN, SET-UP AND CONFIGURATION, TESTING, TRAINING, DEPLOYMENT IMPLEMENTATION AND SUPPORT AND MAINTENANCE**

<b>Criteria</b>	<b>Weight</b>	<b>Sub Criteria</b>	<b>Sub-Weighting</b>
Organisational Capacity, Capabilities and Experience to manage, host and execute the implementation of ERP	30	The proposed ERP software solution must have an established national and international client and user footprint (number of organisations and number of users); The bidder must provide the SANC with the ERP client and end-user information which support the national footprint for both the product clients and users for the Bidder’s own ERP client base for the proposed solution (with specific emphasis on the South African region).	10
		The bidder should submit at least five (5) contactable references who have acquired the same type of software and services from the bidder. References must include the name of the organization, contact person and details.	10
		Ability to provide ERP Software that meets the requirements stated in the scope of work, such as: <ol style="list-style-type: none"> <li>1. Hardware Interfaces</li> <li>2. Software Interfaces</li> <li>3. Communications Interfaces</li> <li>4. Performance Requirements</li> <li>5. Security and control</li> </ol>	10

**TERMS OF REFERENCE: REQUEST FOR PROPOSAL FOR ERP SOFTWARE PROVISIONING, SOLUTION DESIGN, SET-UP AND CONFIGURATION, TESTING, TRAINING, DEPLOYMENT IMPLEMENTATION AND SUPPORT AND MAINTENANCE**

Criteria	Weight	Sub Criteria	Sub-Weighting
		<p>requirements</p> <p>6. Maintainability 7. Usability 8. Remote connectivity 9. Constraints</p> <p>In-house capabilities (resources such as datacentre, IT infrastructure, network connectivity, servers and capacity) to respond to the terms of reference.</p>	
<p>Experience of the Bidder team. The bidder must provide copies of CVs, qualifications including relevant certifications, and outline the experience of each resource. This must reflect relevant qualifications, experience and behavioural skills.</p>	<p align="center">15</p>	<p>80-100% of team members have a minimum of 5 - 10 applicable years' experience and possess qualifications.</p> <p>60-79% of team members have a minimum of 5 - 10 applicable years' experience and possess qualifications.</p> <p>50-69% of team members have a minimum of 5 - 10 applicable years' experience and possess qualifications.</p>	<p align="center">15</p> <p align="center">10</p> <p align="center">5</p>

**TERMS OF REFERENCE: REQUEST FOR PROPOSAL FOR ERP SOFTWARE PROVISIONING, SOLUTION DESIGN, SET-UP AND CONFIGURATION, TESTING, TRAINING, DEPLOYMENT IMPLEMENTATION AND SUPPORT AND MAINTENANCE**

<b>Criteria</b>	<b>Weight</b>	<b>Sub Criteria</b>	<b>Sub-Weighting</b>
		< 50 % of team members have a minimum of 5 - 10 applicable years' experience and possess qualifications.	0
<ul style="list-style-type: none"> <li>The Bidders experience in implementing similar ERP projects</li> </ul>	15	9 – 10 Years' experience 7 - 8 Years' experience 5 - 6 year experience	15 10 5
<ul style="list-style-type: none"> <li>The proposed solution is based on a single software product family with no 3<sup>rd</sup> party integration to deliver the mandatory requirements outlined above</li> </ul>	15	No 3 <sup>rd</sup> party software integration with the proposed solution, except integration which may be required by SANC  Integration with one 3 <sup>rd</sup> party system outside of the proposed ERP system product family  Integration with two or more 3 <sup>rd</sup> party systems outside of the proposed ERP system product family	15  10  5

**16.4. Demonstration / Proof of Concept (POC)**

Bidders who meet technical and functional criteria will be requested to conduct a POC presentation prior to the final award of any contract. The POC presentation will be used to confirm the functionality of the solution. A maximum of 10 working days of notice will be provided to the Bidder to prepare for the POC presentation.

**TERMS OF REFERENCE: REQUEST FOR PROPOSAL FOR ERP SOFTWARE PROVISIONING, SOLUTION DESIGN, SET-UP AND CONFIGURATION, TESTING, TRAINING, DEPLOYMENT IMPLEMENTATION AND SUPPORT AND MAINTENANCE**

**16.5. Step 4: Price and B-BBEE**

Bidders that successfully achieve the minimum points for Step 2 and Step 3 will qualify for evaluation of their Price Proposal. The Price Proposal will only be opened and evaluated once Step 2 and Step 3 are completed. Bidders’ price proposals and BEE certificates will be ranked according to price and preference points from the highest number of points to the lowest. **SANC reserves the right to not necessarily recommend the Bidder with the highest number of points for the award of the tender.**

Bids will be evaluated in terms of the 80/20 Preference Points System **(80 points for price and 20 points for B-BBEE).**

The following formula will be applied to calculate the points for price.

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

Where

- P<sub>s</sub> = Points scored for price of bid under consideration
- P<sub>t</sub> = Rand value of bid under consideration
- P<sub>min</sub> = Rand value of lowest **acceptable** bid

The following formula will be used to calculate the points for B-BBEE:

Bids from non-compliant B-BBEE contributors will not be disqualified. Any B-BBEE qualifying contributor who does not submit a substantiating certificate will be allocated zero points but the bid will not be disqualified.

Points will be awarded to a tenderer for attaining their B-BBEE status level of contributor in accordance with the table below:

<b>B-BBEE Status Level of Contributor</b>	<b>Number of points (80/20)</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

## 17. Bid Submission

### 17.1. Tender Submission Instructions (2 Envelope System)

**FAILURE TO FOLLOW THE INSTRUCTIONS PERTAINING TO THE RFQ PROCESS AS SET OUT HEREIN MAY, IN SANC'S SOLE DISCRETION, LEAD TO THE DISQUALIFICATION OF BIDDERS FROM THIS RFP.**

Bidders must submit their proposal and all supporting documentation in a sealed envelope, clearly marked as follows:

#### 17.1.1. Envelope One – Technical Proposal

Bidders must submit one (1) signed, completed, original of the Technical Proposal, together with one (1) electronic copy on a compact disk (CD) of the Technical Proposal. The envelope must contain all information and documents relating to the tender. **No pricing information must be included in Envelope One.**

#### 17.1.2. Envelope Two – Price Proposal

Bidders must submit one (1) signed, completed, original Price Proposal (pricing schedule/schedule of rates as applicable) and one (1) electronic copy on a compact disk (CD) of the Price Proposal.

**Bidders are required to place the sealed ENVELOPE ONE together with the sealed ENVELOPE TWO into one sealed envelope or container.**

The sealed envelope or container must be marked for the attention of the Head: Procurement and Office Management. Please NOTE the following:

## 18. Compulsory Briefing Session

Attendance at the briefing session for this tender is compulsory and Bidders must ensure that they attend the briefing session and sign the attendance register, as non-attendance or failure to sign the attendance register will automatically disqualify a bidder from submitting a proposal for this Tender.

## 19. Preparation of responses

Bidders shall bear all costs associated with preparation and submission of the proposal. The SANC shall not be responsible or liable for any cost incurred during the bidding process.

## 20. Confidentiality

### 20.1. Confidentiality of Your Information

SANC undertakes to maintain confidentiality relating to any unpublished information you supply to us as part of this bid, and will only use any information provided for the purposes of evaluating this bid.