



# East London IDZ

## MICROSOFT DYNAMICS 365 PROJECT – TENDER BRIEFING SESSION

Reference No: RFP-ICT-111 RT

07 July 2023



# RFP Briefing Session Agenda

- **Housekeeping**
- **Overview of the East London IDZ**
  - Who is the East London IDZ
- **RFP Overview and General Information**
  - Scope
  - Considerations
  - Requirements
  - Response Format
  - RFP Completion Guidelines
  - Handling of Questions
  - ELIDZ Website
- **Procurement Guidelines**
- **Question and Answer Session**

# Housekeeping

## Meeting

- Compulsory briefing meeting

## Attendance Register

- Capture company name, contact person, contact number and email address in the Q&A section.
- Should you not capture them company represented is not signed in the briefing meeting.

## Cellphones \ Microphone

- Please silence your cellphone \ mute your microphone during the presentation

## Handling of Questions During the Meeting

- Type questions on the Q&A section

## Handling of Questions Post Briefing Meeting

- [zandile@elidz.co.za](mailto:zandile@elidz.co.za)



# East London IDZ

## ELIDZ Overview

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# Who is the East London IDZ?

- State-owned company funded by the **provincial** Department of Economic Development and Environment Affairs and the **national** Department of Trade and Industry ( DTI).
- The East London IDZ is governed by a **board of directors representative of key stakeholders** that are integral to the successful functioning of the organization.
- The East London IDZ was designated in September 2002 and began its infrastructure development in 2003.
- the first to receive an operator's permit from the DTI.
- The company is now in full operations.



# East London IDZ

## Project Scope

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# Background

- In 2014, the ELIDZ appointed a service provider through the closed tender process to design, develop and implement a Microsoft product, Microsoft Dynamics AX 2012 R2 as a full-blown ERP solution.
- The ELIDZ is currently utilising the Microsoft Dynamics AX 2012 R2 as the main ERP system. The system has been in operation for the past eight (9) years, and it is being fully utilized.
- Microsoft added many new features in last 9 years and the current version that the organization is now using has since been upgraded. We need to upgrade to **the cloud-based Microsoft Dynamics 365** as the currently installed version is no longer supported.



# Scope

## The Scope Of This RFP Includes The Following:

- **Includes but might not be limited to Specifications outlined in Envelope A Section B: Requirements Specification 4: Detailed Requirements.**
- The objective of this bid is to appoint a suitable, independent service provider that will configure, implement, maintain, and support a Microsoft Dynamics 365 system that will assist the East London IDZ to integrate many functions across the business, such as financial management, human resources, procurement, and sales, to deliver benefits such as increased productivity and efficiency for a period 4 years as detailed in section 4.



# Detailed Scope

The Microsoft Dynamics 365 upgrade together with data migration will include but not limited the following functionality:

## ERP/AX

- Human Resources
- Finance
- Supply Chain Management
- IT Administration

## CRM

- Sales
- Contact Management
- Marketing
- Customer service
- Legal and Contracting
- Field service/Facilities Management
- Project service automation

The scope of the project is gathering, governance development, architecture and build-out of the Microsoft dynamics & Sharepoint site, building workflows, system integration as well as general optimization of existing Office 365 functionality (Teams, Microsoft dynamics & Sharepoint sites) and reporting metrics. The outcome must improve user-system interaction within Microsoft dynamics & Sharepoint and Office 365.

# Overall expected system features

The contractor will customize Microsoft Dynamics 365 to meet the requirements of the ELIDZ. Some scope of the customizations is also outlined in “**Dynamics 365 Technical Requirements**”. This document is an integral part of this TOR. The contractor is expected to bear in mind that user’s requirements may be redefined by the users in question during the user acceptance test of the system. This should be affected if they do not fall out of the already accepted scope. The overall expected system features are:

- **Single Sign-In:** The system should provide a single sign in Intranet interface by which the user accesses all the underlying applications.
- **Workflow:** The system should have workflows for various business processes. These workflows should be formulated using the existing procedures and benchmarking on the recommended workflow standards.
- **Dashboards:** The system should be able to generate dashboards to various users of the system. This should be formulated based on different information requirement for different users of the system.
- **Web Access:** The system should be accessible via internet on a web browser.
- **Reports:** The system should be configured so that it is able to generate different reports to different system users as per their needs to support day to day management and running of the organization.
- **Controls:** Controls should be in-built within the system where, marker-check is implemented and access to information on the system should also be restricted as per the ELIDZ active directory.
- **Single Database:** The system should run from a single central database that is secure.
- **User Access Levels/Roles/Rights:** The system should have a user administration center which manages user roles, users access levels and the right they have over the information on the system i.e., what they have access and what they do not have right to access.
- **Document Management:** The system should have an ability to integrate with the ELIDZ document management system to allow users to upload crucial documents as attachments to various system entries. This helps in archiving crucial documents.
- **Data Security:** The system should be well secured from unauthorized access and data in the system well secured.
- **Email Notifications:** The system should be configurable to send out email alerts notifications.
- **Audit Trail:** The system should have audit trail for all the events in the system.

# Functionality:

Evaluation Areas	Evaluation Criteria	Total Max Points	Item Max Points	Evaluation Description
<b>Project Management</b>	Project Management plan	5	5	Project plan provided; Project manager included
			0	No project plan provided
<b>Change Management</b>	Change Management Plan/Strategy	10	10	Change management plan/strategy reflecting at least two change agents that will be responsible for change management
			5	Change management plan/strategy does cover all projects stages, details of the agent are not provided.
			0	Change Management Plan/Strategy not provided.
<b>Implementation , Training, Support Plan &amp; Methodology</b>	Project Methodology	10	10	Precise project methodology to be adopted including all project stages provided.
			0	Partial or project methodology provided
	Training Plan, Documentation Plan	5	5	Training plan for end users and administrators provided.
			0	No training plan provided
	Support Plan	10	10	Maintenance and support plan submitted including:  (a) Support Plan Considering onsite and offsite support. Detailed plan with support level by severity and time-bound  (b) Response time (according to urgency)
			0	Partial or no maintenance and support plan submitted

# Functionality:

<b>Solution Proposal</b>	Completeness of the offered solution.	20	20	Detailed solution proposal provided fully address IDZ requirements.
			10	Solution proposal provided partially addresses the IDZ requirements.
			0	Solution proposal provided does not address the IDZ requirements or is not provided.
<b>Service Provider Expertise</b>	Service Provider Expertise	30	30	Proven previous works with a minimum of three (3) other organisations of similar size (from 100 users) where the same system (Microsoft Dynamics 365) was configured and rolled out. Three (3) contactable, stamped or signed reference letters relevant to this tender provided.
			20	Proven previous works two (2) other organisations of similar size (from 100 users) where the same system (Microsoft Dynamics 365) was configured and rolled out. Two (2) contactable, stamped or signed reference letters relevant to this tender provided.
			10	Proven previous works with a one other organisation of similar size (from 100 users) where the same system (Microsoft Dynamics 365) was configured and rolled out. One (1) contactable, stamped or signed reference letters relevant to this tender provided.
			0	No verifiable Reference Letters provided
	Skills Competency	20	20	Project team composition and details provided with CVs indicating experience, Qualifications and relevant Microsoft Qualifications. Bidder provided at least eight (8) resources with an average of 5 years experience.
			15	Project team composition and details provided with CVs indicating experience, Qualifications and relevant Microsoft Qualifications. Bidder provided at least six (6) resources with an average of 5 years experience.
			10	Project team composition and details provided with CVs indicating experience, Qualifications and relevant Microsoft Qualifications. Bidder provided at least five (5) resources or has an average of less than 5 years' experience.
			5	Project team composition and details provided, but with no CV's
			0	No project team details provided

# Considerations Continued

## **Financial Considerations**

Payment milestones will be attached to the service level agreement.

## **Time Considerations**

The East London Industrial Development Zone would like this project to commence as soon as possible after approval and the signing of the service level agreement.

## **Delivery of Services Considerations**

The delivery of services will be required at the ELIDZ office, Lower Chester Road, Sunnyridge, East London as well as other designated locations as indicated in the pricing schedule - Envelope B.

Onsite storage and office space will be made available if and when required.

# Considerations Continued

## Time Constraints

The ELIDZ envisages the following delivery timelines for the project:

### Milestones

Configuration of the system

After go-live support (3 months)

3-year support and maintenance

### Target Date

Completed by the 31 March 2024

Completed by the 30 June 2024

01 July 2024 – 30 June 2027

# Method of Submission

- **Tenders must be submitted on-line on the on the ELIDZ website at <http://www.elidz.co.za> - <https://tenderportal.elidz.co.za> - under Opportunities Tenders.**
- It will be the responsibility of the tenderer to ensure that the tender documentation are uploaded before 12h00 on the 24 July 2023.
- Tenderers must submit technical proposal “Envelope A” separate from financial proposal “Envelope B”.
- No financial disclosure must not be included in the technical proposal “Envelope A”
- The financial proposal will only be opened should the technical proposal be found to be acceptable.
- The Envelope A – Technical Proposal:
  - Must include numbered or alphabetized section dividers and a contents page that indicates the numbered or alphabetized section names.
  - Above-mentioned sections to align to documents listed in the above tables articulating the Supporting and Compulsory documentation to be submitted.
  - Ensure the all the documents are property scanned before uploaded and in corrector format prior submission.



# Response Format : Supporting Documentation to be submitted

- Accredited Valid Original or Certified B-BBEE Certificate for EMES and QSE - Sworn Affidavit confirming annual turnover and B-BEE management split of company
- Company Profile
- Valid Tax Clearance Certificate or SARS PIN
- Valid Proof of Office Location (eg. Relevant, verifiable municipal utility bill, rental / lease agreement of business location)
- Three (3) Completed and Verifiable Reference Letters for similar work (Annexure 2)
- Company Profile
- Proposed Solution and Project Approach/Methodology
- Project Team Skills Matrix and Curriculum Vitae's
- Support and maintenance plan
- Proof of Training Plans
- Proof of Test Plans
- Change Management Plan/Strategy
- Documentation and Support plan

# Response Format : Compulsory Documentation to be submitted

- Completed and Signed ELIDZ Procurement Handbook with all relevant supporting documentation (Tax clearance etc.)
- CSD Registration Certificate
- JV Participation Documentation with consolidated BBBEE (If applicable)
- Microsoft Certification on Business Applications

# Handling of Questions

**Questions relating to the RFQ will be accepted via email.**

- Questions relating to the RFP will be accepted until 16:30 h00 on 14 July 2023.
- All questions will be noted, responded to via email and circulated to all respondents no later than 16:00 17 July 2023.
- Please ensure the company represented is signed in by capturing company name, contact person, contact number and email address in the Q&A section.

**All questions must be submitted to:**

- Zandile Mtebele
- Email: [Zandile@elidz.co.za](mailto:Zandile@elidz.co.za)
- All questions should be in writing
- Verbal question shall not be accepted

# ELIDZ Website – Tender Opportunities

## Full Tender Advert & Documents

The full tender advert is available on the ELIDZ website at <http://www.elidz.co.za>

Tenders are posted under **Opportunities Tenders**

An electronic version of Envelope A & B, ELIDZ Procumbent Handbook and the Reference Letter Template can also be found at the same location.



# East London IDZ

## Procurement Guidelines

Reference No: RFP-ICT-111 RT

24 July 2023



# Procurement Guidelines

## Purpose

- Procurement Policy
- Two-Envelope Method

## Evaluation Criteria 70%

- Functionality – (All tenders with functionality less than 70% of the total functional requirements will not be considered.)

## Preference Points 80/20

- 80 Points for Price
- 20 Points for Specific Goals

# Procurement Guidelines

## Technical Submission (Envelope A)

- **Completion of Procurement Forms**

- Completion of all sections of Procurement Handbook, inclusive of **Disclosure of Interests** page (Compulsory).
- Submission of B-BBEE Certification and/or Sworn affidavit as outlined in the B-BBEE Act/ original/Certified copy
- Valid SARS TAX clearance Certificate/Pin code
- CSD Registration
- Documents listed under RETURNABLE SCHEDULES/DOCUMENTS must be submitted with Envelop A
- Inclusion of Price or any price details in envelope A 'Technical Proposal ' will result in disqualification of the tender



# Procurement Guidelines

## Completion of Price Proposal Schedule (Envelope B)

Non-Completion of the ELIDZ Price Proposal Schedule in envelop B “Financial Proposal” will result in disqualification.

Total Price should include the provisional amount provided

Price Schedule (figures vs. words & signatures).

Non signed Price Schedule will result in disqualification of bid offer.

# Price Schedule

Description	Qty	Amount ( R )	
Configuration and implementation (all costs)	1		
After-go-live support (3 months)	1		
Support and maintenance Year 1	1		
Support and maintenance Year 2	1		
Support and maintenance Year 3	1		
Contingency amount	1	R 2,000,000.00	
		Amount ( R )	
<b>Total</b>			
<b>VAT @ 15%</b>			
<b>Total (Including VAT)</b>			Transfer Total Amount to the Proposal Price Schedule

# Procurement Guidelines

## Envelope Submission:

- Tenders must be submitted on-line on the on the ELIDZ website at <http://www.elidz.co.za> - <https://tenderportal.elidz.co.za> - under Opportunities Tenders.
- **Joint Venture Submission**
  - ✓ JV Document Submissions (e.g. Tax Clearance, Consolidated B-BBEE and Business Reg. etc.)
  - ✓ JV Participation Split (%) and signed Agreement

# Procurement Guidelines

## Evaluation of Tenders (Adjudication Structures)

Internal Evaluation Committee conducts tender evaluations  
(may invite experts from outside)

Adjudication: *based on financial delegations*

## Adjudicating Structures

Procurement Committee  
Finance & Tender Committee of the Board  
Board of Directors

## Award

Letter of Appointment  
Signing of Service Level Agreement

## Supplier Development

In the event that the successful Bidder has been awarded the contract with value above R 5 000 000.00 for the same goods/services on a consecutive basis, the successful Bidder will be required to submit a Supplier development plan for SMMs to be agreed with the ELIDZ



# East London IDZ

## Question and Answer Session

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24 July 2023

