

**BID RESPONSE DOCUMENTS – TECHNICAL PROPOSAL (ENVELOPE ONE)**

**ADDENDUM A**

**ENTERPRISE RESOURCE PLANNING (ERP)**

**BID NUMBER: WCPPT 02/2016**

**NAME OF BIDDING COMPANY: ……………………………………………………………….**

**CONTACT PERSON: ……………………………………………………………………………..**

**CONTACT TELEPHONE: ………………………………………………………………………..**

**EMAIL: ………………………………………………………………………………………….**

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# Standard Bidding Documents

## Invitation to Bid

You are hereby invited to bid for requirements of the Western Cape Provincial Parliament

#### BID NUMBER: WCPPT 02/2016

#### CLOSING DATE: 13 June 2016

CLOSING TIME: 11:00

#### VALIDITY PERIOD: 60 DAYS (from closing date)

DESCRIPTION: ***SUPPLY AND IMPLEMENTATION OF AN ENTERPRISE RESOURCE PLANNING SYSTEM***

**The successful bidder will be required to sign a written service level agreement**

Kindly note that bids must be deposited in the bid box situated outside the Visitors’ Centre, Ground Floor. The physical address is:

Manager: SCM

Western Cape Provincial Parliament

7 Wale Street

CAPE TOWN

8001

**Bid documents that are too bulky to be placed in the bid box may be delivered at SCM Section, 5th Floor, Provincial Legislature Building, 7 Wale Street, Cape Town.**

Bidders should ensure that bids are delivered timeously to the correct address. If a bid is late, it will not be accepted for consideration.

BIDDERS MUST MAKE USE OF THE OFFICIAL ATTACHED BID DOCUMENTS/ FORMS AND NO DOCUMENT/ FORM SHALL BE RETYPED. Photocopies of the documents/forms may however be used. A bid submitted in any other manner might invalidate the bid.

**THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.**

THE FOLLOWING PARTICULARS MUST BE FURNISHED

(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)

NAME OF BIDDER ……………………………………………………………………………………

POSTAL ADDRESS ……………………………………………………………………………………

STREET ADDRESS ……………………………………………………………………………………

TELEPHONE NUMBER CODE …………NUMBER ………………………………………………

CELLPHONE NUMBER ……………………………………………………………………………………

FACSIMILE NUMBER CODE …………NUMBER ………………………………………………

VAT REGISTRATION NUMBER ……………………………………………………………………………………

HAS A VALID, ORIGINAL TAX CLEARANCE CERTIFICATE BEEN SUBMITTED (WCPP)? YES/NO

ARE YOU THE ACCREDITED REPRESENTATIVE

IN SOUTH AFRICA FOR THE GOODS/SERVICES OFFERED BY YOU? YES/NO

(IF YES ENCLOSE PROOF)

SIGNATURE OF BIDDER ……………………………………………………………………………

DATE ……………………………………………………………………………

CAPACITY UNDER WHICH THIS BID IS SIGNED ……………………………………………………

## Important Conditions

1. Failure on the part of the bidder to sign this bid form and thus to acknowledge and accept the conditions in writing or to complete the attached forms, questionnaires and specifications in all respects, may invalidate the bid.
2. Bids should be submitted on the official forms and should not be qualified by the bidder’s own conditions of bid. Failure to comply with these requirements or to renounce specifically the bidder’s own conditions of bid, when called upon to do so, may invalidate the bid.
3. If any of the conditions on this bid form are in conflict with any special condition stipulations or provisions incorporated in the bid, such special conditions, stipulations or provisions shall apply.

## Tax clearance requirements

IT IS A CONDITION THAT: -

1. The taxes of the successful bidder **MUST** be in order, or that satisfactory arrangements have been made with the Receiver of Revenue to meet his/her tax obligations – refer to the **PPPFA (Act 5 of 2000)** and **FMPPLA (Act 10 of 2009) Section 40 (e).**
2. The attached form “Application for Tax Clearance Certificate (in respect of bidders)” must be completed in all respects and submitted to the Receiver of Revenue where the bidder is registered for tax purposes. The Receiver of Revenue will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of twelve (12) months from date of issue. The Tax Clearance Certificate must be submitted in the original together with the bid. Failure to submit the valid original Tax Clearance Certificate at the closing time of the bid will invalidate the bid.
3. In bids where Consortia/Joint Ventures/Sub-contractors are involved each party must submit a separate valid, original Tax Clearance Certificate. Copies of the application for Tax Clearance Certificate are available at any Receiver’s Office.

|  |
| --- |
| **APPLICATION FOR TAX CLEARANCE CERTIFICATE**  (IN RESPECT OF BIDDERS) |

|  |  |  |
| --- | --- | --- |
| 1.NAME OF TAXPAYER / BIDDER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  2.TRADENAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  3. IDENTIFICATION NO: (If applicable) / / / / / / / / / / / /  4. COMPANY / CLOSE CORPORATION REGISTRATION NO. / / / / / / / / / / /  5. INCOME TAX REFERENCE NO: / / / / / / / / / / /  6. VAT REGISTRATION NO: (If applicable) / / / / / / / / / / /  7. PAYE EMPLOYER’S REGISTRATION NO: (If applicable) / / / / / / / / / / / | | |
| Signature of contact person requiring Tax Clearance Certificate | : |  |
| Name | : |  |
| Telephone Number | : |  |
| Address | : |  |
|  |  |  |
| Date | : |  |

PLEASE NOTE THAT THE COMMISSIONER FOR THE SOUTH AFRICAN REVENUE SERVICES (SARS) WILL NOT EXERCISE HIS DISCRETIONARY POWERS IN FAVOUR OF ANY PERSON WITH REGARD TO ANY INTEREST, PENALTIES AND/OR ADDITIONAL TAX LEVIABLE DUE TO THE LATE- OR UNDERPAYMENT OF TAXES, DUTIES OR LEVIES OR THE RENDITION RETURNS BY ANYPERSON AS A RESULT OF ANY SYSTEM NOT BEING YEAR 2000 COMPLAINT.

## Declaration of interest

1. To give effect to the requirements of FMPPLA (Act 10 of 2009) Section 46 (b) with specific reference to the Western Cape Provincial Parliament, the Western Cape Procurement (Business Interest of Employees) Act No 8 of 2010, Practice Note 4 of 2006 Declaration of Bidders Past SCM Practices-(WCPP 4), Instruction note Enhancing Compliance Monitoring and Improving Transparency and Accountability in Supply Chain Management WCPP 4 Declaration of Interest, Practice Note 2010 Prohibition of Restrictive practices, Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998 as amended together with its associated regulations, the Prevention and Combating of Corrupt Activities Act No 12 of 2004 and regulations pertaining to the tender defaulters register, Paragraph 16A9 of the National Treasury Regulations and/or any other applicable legislation.
2. All prospective bidders intending to do business with the Institution must be registered on the central supplier database or IPS (ARIBA).
3. **Definitions**

**“Bid”** includes a price quotation, advertised competitive bid, limited bid or proposal

**“Bid rigging (or collusive bidding)**” occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors

**‘‘business interest’’** means —

* + 1. a right or entitlement to share in profits, revenue or assets of an entity;
    2. a real or personal right in property; and
    3. a right to remuneration or any other private gain or benefit, and includes any interest contemplated in paragraphs (a), (b) or (c) acquired through an intermediary and any potential interest in terms of any of those paragraphs.

**“Consortium or Joint Venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;

**‘‘a person in the employ of the state’’ means** —

1. a member of the board of directors of any municipal entity;
2. an official of any municipality or municipal entity;
3. an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act;
4. member of the accounting authority of any national or provincial public entity; or
5. an employee of Parliament or a provincial legislature.

**‘‘entity’’** means any —

1. association of persons, whether or not incorporated or registered in terms of any law, including a company, corporation, trust, partnership, close corporation, joint venture or consortium; or
2. sole proprietorship;

**‘‘entity conducting business with the Institution’’** means an entity that contracts or applies or tenders for the sale, lease or supply of goods or services to the Province

**“Family member”** means a person’s —

1. spouse; or
2. child, parent, brother or sister, whether such a relationship results from birth, marriage or adoption;

**‘‘intermediary’’** means a person through whom an interest is acquired, and includes —

1. a person to whom is granted or from whom is received a general power of attorney; and
2. a representative or agent;

“**Institution**” means —

Western Cape Provincial Parliament (WCPP)

Western Cape Provincial Parliament means - the [legislature](https://en.wikipedia.org/wiki/Legislature) of the [Western Cape.](https://en.wikipedia.org/wiki/Western_Cape)

**“Private work”** means —

Remunerative Work Outside the WCPP

**‘‘spouse’’** means a person’s —

1. partner in marriage;
2. partner in a customary union according to indigenous law; or
3. partner in a relationship in which the parties live together in a manner resembling a marital partnership or customary union.
4. Any legal person, including persons employed by the Institution, or their family members, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the WCPP, or to their family member, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where the bidder is employed by the Institution; and/or
5. The bid of any bidder may be disregarded if that bidder or any of its directors have abused the institution’s supply chain management system; committed fraud or any other improper conduct in relation to such system; or failed to perform on any previous contract.
6. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds
7. Communication between partners in a joint venture or consortium will not be construed as collusive bidding
8. In addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

|  |  |  |
| --- | --- | --- |
| **SECTION A: DETAILS OF THE ENTITY** | | |
| **A1.** | *Name of the Entity* |  |
| **A2.** | *Entity registration Number*  (*where applicable)* |  |
| **A3.** | *Entity Type* |  |
| **A4.** | *Tax Reference Number* |  |
| **A5.** | *Full details of directors, shareholder, member, partner, trustee, sole proprietor or any persons with a right or entitlement to share in profits, revenue or assets of an entity****,*** *of the entity should be disclosed in the Table A below****.*** | |
| **TABLE A**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **FULL NAME** | **DESIGNATION**  *(Where a director is a shareholder, both should be confirmed.)* | **IDENTITY NUMBER** | **PERSONAL TAX REFERENCE NO.** | **PERCENTAGE INTEREST IN THE ENTITY** | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | | | |
| **SECTION B: DECLARATION OF THE BIDDER’S INTEREST**  *To disclose relationships between the bidding entity and persons listed in Table A and any employees of the Institution; and to restrict business interest of Institution employees’ in terms of FMPPLA regulation Section 46 (d), bidding entity must give the following details. An Institution employee not involved in the bidding process as per Section 46 (d), taking remunerative work outside the WCPP, should first obtain necessary approval in terms of the* ***WCPP code of conduct paragraph 7****, failure to submit proof of such authority, where applicable, may result in the disqualification of the bid. (*Please provide a tick (✓) in this instance. In the event of Yes/no option throughout this document please circle to select the appropriate option) | | |
| **B1.** | |  |  | | --- | --- | | NO | YES |   Are any persons listed in Table A employees of the Institution?  ***(If yes, complete Table B and attach “*Private work*”)*** | |
| **B2.** | |  |  | | --- | --- | | NO | YES |   Are any employees of the entity also employees of the Institution?  ***(If yes complete Table B and attach “*Private work*”)*** | |
| **B3.** | |  |  | | --- | --- | | NO | YES |   Are any family members of the persons listed in Table A employees of the Institution?  ***(If yes complete Table B)*** | |
| **TABLE B**  *Details of persons connected with the bidder who are employees of the Institution as defined should be disclosed in Table B below.*   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **FULL NAME OF INSTITUTION EMPLOYEE** | **IDENTITY NUMBER** | **PROVINCIAL DEPARTMENT/ ENTITY OF EMPLOYMENT** | **DESIGNATION / RELATIONSHIP TO BIDDER\*\*** | **INSTITUTION EMPLOYEE NO./PERSAL NO.**  (*Indicate if not known*) | **PERCENTAGE INTEREST** | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | | | |
| **SECTION C: PERFORMANCE MANAGEMENT AND BIDDER’S PAST SUPPLY CHAIN MANAGEMENT PRACTICES**  *To enable the prospective bidder to provide evidence of past and current performance with the Institution.* | | |
| **C1.** | Did the entity conduct business with the Institution in the last twelve months?  ***(If yes complete Table C)***   |  |  | | --- | --- | | NO | YES | | |
| **Table C**  *Complete the below table to the maximum of the last 5 contracts.*   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **NAME OF CONTRACTOR** | **PROVINCIAL DEPARTMENT OR PROVINCIAL ENTITY** | **TYPE OF SERVICES OR COMMODITY** | **CONTRACT / ORDER NUMBER** | **PERIOD OF CONTRACT** | **VALUE OF CONTRACT** | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | | | |
| **C2.** | Is the entity or its principals listed on the National Database as companies or persons prohibited from doing business with the public sector in line with **FMPPLA Regulation 5 (5) (b)**?   |  |  | | --- | --- | | NO | YES | | |
| **C3.** | Is the entity or its principals listed on the National Treasury Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No. 12 of 2004) and further read with **FMPPLA Regulation 5 (5) (b**)?  *(To access this Register enter the National Treasury’s website,* [*www.treasury.gov.za*](http://www.treasury.gov.za)*, click on the icon “Register for Tender Defaulters” or submit your written request for a hard copy of the Register to facsimile number (012) 3265445*.)   |  |  | | --- | --- | | NO | YES | | |
| **C4.** | If yes to C3 or C4, were you informed in writing about the listing on the database of restricted suppliers or Register for Tender Defaulters by National Treasury?   |  |  | | --- | --- | | NO | YES | | |
| **C5.** | Was the entity or persons listed in Table A convicted for fraud or corruption during the past five years in a court of law (including a court outside the Republic of South Africa)?   |  |  | | --- | --- | | NO | YES | | |
| **SECTION D: DULY AUTHORISED REPRESENTATIVE TO DEPOSE TO AFFIDAVIT**  *The form should be signed by a duly authorised representative of the entity before a commissioner of oaths* | | |
|  | I, ..………………………………………………….............................. hereby swear/affirm;   1. that the information disclosed in these RFP documents is true and accurate; 2. that I understand the content of the document; 3. the entity undertakes to independently arrive at any offer at any time to the Institution without any consultation, communication, agreement or arrangement with any competitor. In addition, that there will be no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to the Institution. 4. that the entity or its representative are aware of and undertakes not to disclose the terms of any bid, formal or informal, directly or indirectly, to any competitor, prior to the awarding of the contract.     \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  DULY AUTHORISED REPRESENTATIVE’S SIGNATURE | |
|  | I certify that before administering the oath/affirmation I asked the deponent the following questions and wrote down his/her answers in his/her presence:  1.1 Do you know and understand the contents of the declaration?  ANSWER: ……………………  1.2 Do you have any objection to taking the prescribed oath?  ANSWER: ……………………..  1.3 Do you consider the prescribed oath to be binding on your conscience?  ANSWER: …………………….  1.4 Do you want to make an affirmation?  ANSWER: …………………….  2. I certify that the deponent has acknowledged that he/she knows and understands the contents of this declaration, which was sworn to/affirmed before me and the deponent’s signature/thumbprint/mark was place thereon in my presence.  ………………………………………………………………………………….  SIGNATURE FULL NAMES  Commissioner of Oaths  Designation (rank)………………………….ex officio: Republic of South Africa  Date: ………………………………Place ………………………………  Business Address: ………………………………………………………………… | |

# Executive Summary

*This part of the response to the RFP* ***must be limited to a brief narrative and not to exceed two (2) pages*** *describing the proposed solution. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The executive summary should not include cost quotations.*

# Company Background

|  |  |
| --- | --- |
| **Question No.** | **Question** |
|  | What are the key differentiators of your company and its proposed solution? |
|  | Click here to enter text. |
|  | What recognition awards, if any, have your company or proposed solution obtained that are relevant to this project? |
|  | Click here to enter text. |
|  | Has an independent source (e.g. professional review in an industry accredited journal, etc.) positively promoted either the company or products the Bidder is offering, in the last 2 years? Please provide proof. |
|  | Click here to enter text. |
|  | Is the Bidder a software partner for the product it is proposing? Please provide proof. |
|  | Click here to enter text. |
|  | How many fully operational customer installations, in total, has the Bidder completed? |
|  | |  |  |  | | --- | --- | --- | | **Location** | **Western Cape** | **Nationally** | | State Owned Institutions | Click here to enter text. | Click here to enter text. | | Other public sector | Click here to enter text. | Click here to enter text. | | Other non-public sector | Click here to enter text. | Click here to enter text. | | **Overall:** | Click here to enter text. | Click here to enter text. | |
|  | Based in the answer above, please describe why each of the customer installations are viewed as being a success? |
|  | Click here to enter text. |
|  | Please state the year the Bidder started in the business of selling and implementing the proposed solution: |
|  | Click here to enter text. |
|  | Please provide a detail breakdown of the Bidder’s sales in the previous two years: Please provide Financial Statement to substantiate sales figures. |
|  | |  |  |  | | --- | --- | --- | | **Year** | **Sales** | **% of sales as a result of the product you are proposing** | | 2015/2014 | Click here to enter text. | Click here to enter text. | | 2014/2013 | Click here to enter text. | Click here to enter text. | |

**Additional Attachments**

* Audited Annual Financial Statements for the last two (2) financial years.
* Complete list of subcontractors, including background and details of relationship with the Bidder.

# References

Of the reference below, at least 2 should correspond to the customer installations listed in the Bidders answer for question 6 above.

|  |  |
| --- | --- |
| **Client 1 Name:** | Click here to enter text. |
| **Description of Implemented solution:** | Click here to enter text. |
| **Location of client:** | Click here to enter text. |
| **Contact details:** | Click here to enter text. |
| **Estimated value of contract:** | Click here to enter text. |

|  |  |
| --- | --- |
| **Client 2 Name:** | **Click here to enter text.** |
| **Description of Implemented solution:** | Click here to enter text. |
| **Location of client:** | Click here to enter text. |
| **Contact details:** | Click here to enter text. |
| **Estimated value of contract:** | Click here to enter text. |

|  |  |
| --- | --- |
| **Client 3 Name:** | Click here to enter text. |
| **Description of Implemented solution:** | Click here to enter text. |
| **Location of client:** | Click here to enter text. |
| **Contact details:** | Click here to enter text. |
| **Estimated value of contract:** | Click here to enter text. |

|  |  |
| --- | --- |
| **Client 4 Name:** | Click here to enter text. |
| **Description of Implemented solution:** | Click here to enter text. |
| **Location of client:** | Click here to enter text. |
| **Contact details:** | Click here to enter text. |
| **Estimated value of contract:** | Click here to enter text. |

# Application and Database Software

|  |  |
| --- | --- |
| **Question No** | **Question** |
|  | Describe your overall proposed technology solution. Including an architecture view of the solution (i.e. business, application and technology architecture). |
|  | Click here to enter text. |
|  | Describe the software development roadmap as determined by the software developer (i.e. major releases and upgrades, frequency of releases, significant planned functionality enhancements, planned mergers/acquisitions with other software companies, commitment of the software developer to maintain and support the software for the foreseeable future). |
|  | Click here to enter text. |
|  | Describe unique aspects of the Bidder’s solution in the marketplace. |
|  | Click here to enter text. |
|  | Describe components of the solution that are industry standards versus being proprietary to the Bidder. |
|  | Click here to enter text. |
|  | For third party products proposed that are integrated with the Bidder’s solution provide the following for each product:   * Reason that this product is a third-party product versus being part of the software Bidder’s solution, * Extent to which this third-party product is integrated with the Bidder’s solution. |
|  | Click here to enter text. |

# Technical and Hardware Requirements

| **Question No** | **Question** |
| --- | --- |
|  | Describe the proposed computer hardware and storage environment to support the system for the production, development, staging and test environments. In the event that there are multiple computer systems available, list all options.  Indicate which is the preferred hardware platform and why?  List the conditions in which the preferred hardware platform would change. |
|  | Click here to enter text. |
|  | What system architecture do you propose?  Describe the number and type of: application servers, database server(s), and production, development, staging and test environments.  Describe your proposal’s technical architecture (preferably using a PowerPoint or Visio diagram). This should show components such as the database server, applications server, reporting server, firewall(s), web server(s), web browser, minimum workstation requirements, storage requirements, minimum mobile requirements, remote access, wireless connectivity, network connectivity to LANs and WAN, etc.  Describe any potential use of virtual server technologies (e.g. Microsoft Virtual Server, Hyper-V) and application accelerators and note what Bidders you partner with or recommend and/or support. |
|  | Click here to enter text. |
|  | Describe your proposed information architecture/model (preferably using a PowerPoint or Visio diagram). If possible this should also depict solution data models, taxonomy, data elements, coding structures, data definitions (employees, Bidders, invoices, etc.) |
|  | Click here to enter text. |
|  | Describe the minimum hardware, software, storage, memory, operating system and other requirements for end-user devices to access the application such that the WCPP can determine the extent to which existing computers must be upgraded or replaced. |
|  | Click here to enter text. |
|  | System response time must not impede the ability for departmental staff to perform their required job functions using the system. Please provide benchmarking statistics of the response time of your proposed solution? |
|  | Click here to enter text. |
|  | Will your system be available 99.5% of the time, except for planned downtime? |
|  | Click here to enter text. |
|  | What are your guarantees on system performance? |
|  | Click here to enter text. |
|  | Describe the identification and authorisation capabilities of your proposed solution for users. |
|  | Click here to enter text. |
|  | Describe how your system interoperates with Active Directory. |
|  | Click here to enter text. |
|  | Describe the security audit capabilities of your proposed solution. |
|  | Click here to enter text. |
|  | Describe your backup and recovery and a business continuity model (Replication, High Availability, Fail over, Storage). |
|  | Click here to enter text. |

**Additional Attachments**

1. Powerpoint or Visio diagram of the Technical Architecture
2. Powerpoint or Visio diagram of the Information Architecture

# Proposed Implementation Plan

## General Implementation Approach

| *.*Question No | Question |
| --- | --- |
|  | *Provide a description of the implementation approach that will be followed by the Bidder. This should be broken down in the phases.* |
|  | Click here to enter text. |

## Project Management Approach and methodology

| Question No | Question |
| --- | --- |
|  | *Provide a description of the project management approach and work plan.* |
|  | Click here to enter text. |

## Hardware, Software and Storage Design and Installation Consulting

| Question No | Question |
| --- | --- |
|  | *Describe the approach to be taken to facilitate the most effective deployment of the proposed solution, including hardware, software, communications and related equipment?* |
|  | Click here to enter text. |

## Data Conversion and Migration Plan

| Question No | Question |
| --- | --- |
|  | *Describe the approach for the conversion of both electronic and manual data to the new system. It is expected that the WCPP (supported by its current service providers) will be responsible for data extraction from current systems and data scrubbing and data pre-processing and that the Bidder will be responsible for overall data conversion coordination, definition of file layouts, source to target mapping and data import and validation into the new ERP.* |
|  | Click here to enter text. |

## Report Development using standard and user definable reporting

| Question No | Question |
| --- | --- |
|  | Provide a description of various methods of reporting for the proposed solution. |
|  | Click here to enter text. |
|  | Describe the methods for the WCPP to identify, specify, and develop required user defined reports during the implementation. |
|  | Click here to enter text. |
|  | What reports are available out of the box? Provide a list and samples at the end of this section. |
|  | Click here to enter text. |
|  | Describe your process for determining the scope of what reports will have to be developed (not out-of-the-box) and what effort it will take to develop and test them? |
|  | Click here to enter text. |
|  | It is expected that the system will provide the ability for end-user querying and reporting to be performed without impacting the performance of the transactional system. Does your proposal meet this expectation? |
|  | Click here to enter text. |
|  | Describe ability to create user definable reports. |
|  | Click here to enter text. |
|  | Describe your proposed approach for WCPP to develop internal user defined reports post the successful implementation of the solution. |
|  | Click here to enter text. |

## Training Services

|  |  |
| --- | --- |
| Question No | Question |
|  | What is your recommended approach to training (for both End-user and train the trainer)? |
|  | Click here to enter text. |
|  | What types of training documentation will be developed by the Bidder? |
|  | Click here to enter text. |
|  | What additional tools will be used in developing the training material? |
|  | Click here to enter text. |
|  | Describe the opportunities for ongoing training. |
|  | Click here to enter text. |
|  | Describe the Bidder’s ability to provide online training material versus classroom training. |
|  | Click here to enter text. |
|  | Describe the general timeframes in which both types of training will be conducted (End-user and train the trainer) |
|  | Click here to enter text. |
|  | List the nature, level, and amount of training to be provided in each of the following areas:   * Technical training (e.g. configuration, scripting, operations, etc.) * User training * Other staff (e.g. executive level administrative staff) |
|  | Click here to enter text. |

## Change Management Approach

|  |  |
| --- | --- |
| Question No | Question |
|  | The Bidder should clearly identify their approach towards Change Management including any unique approaches, processes, or tools that will be used. |
|  | Click here to enter text. |

## System Documentation, manuals and Testing

|  |  |
| --- | --- |
| Question No | Question |
|  | Describe what documentation (user guide, technical guide, training materials, etc.) is available on the system proposed and any related costs. |
|  | Click here to enter text. |
|  | Describe what types of documentation you anticipate developing during the course of the project. |
|  | Click here to enter text. |
|  | The Bidder should also describe their recommended approach to the following types of testing that are anticipated to be performed on the project and the type of assistance they anticipate providing to the WCPP related to such testing:  1. System testing  2. Integration testing (in relation to the ERP modules)  3. Penetration testing  4. Stress/performance testing  5. User acceptance testing (UAT)  6. Quality matrix of each of the above 5 points  Note: All testing as described above will be executed and managed by the service provider with WCPP support and sign-off. |
|  | Click here to enter text. |

## Process Re-Design Assistance

|  |  |
| --- | --- |
| Question No | Question |
|  | Bidders are requested to describe their approach towards process redesign including discussion on the optimal time in which to conduct redesign as it relates to implementation of the new software. |
|  | Click here to enter text. |
|  | In addition, please describe your organisation’s capabilities to assist in a WCPP wide redesign of the chart of accounts to best leverage the capabilities of the system in order to meet the WCPP’s overall financial tracking and reporting objectives considering the constraints in terms of standard chart of accounts that must be used by WCPP. |
|  | Click here to enter text. |

## Knowledge Transfer to WCPP Staff

|  |  |
| --- | --- |
| Question No | Question |
|  | Describe the process for ensuring that a transfer of knowledge occurs back to WCPP staff so that they are capable of supporting and maintaining the application in the most proficient manner once the implementation engagement is complete. |
|  | Click here to enter text. |
|  | Describe how the bidder suggests that knowledge transfer will be measured. |
|  | Click here to enter text. |

## Other activities proposed by the Bidder and the Microsoft Project Plan

|  |  |
| --- | --- |
| Question No | Question |
|  | Details of additional elements that the Bidder feels may add value to the overall implementation. |
|  | Click here to enter text. |
|  | The Bidder must provide their project plan in a Microsoft Office Project (2010 or later version) format as part of the proposal response to be included in the Electronic Copy of the Technical Proposal. |
|  | Please attached Microsoft Project 2010 or later version |

# Draft SLA including standard terms and conditions

*Please insert the proposed Service Level Agreements (SLAs), including standard terms and conditions for the following:*

* *the ERP implementation project; and*
* *the ongoing support services.*

# Ongoing Support Services

| **Question No** | **Question** |
| --- | --- |
| **Support and Maintenance** | |
|  | Please specify the nature and conditions of any post-implementation support including as a minimum requirement:   1. Post-go live support that is included in the proposal response; 2. Onsite support (e.g. system tuning, application configuration, interface issues, report development, network optimisation, user training and tips to optimise the user experience); 3. Telephone support; 4. Help Desk services (If there is a service level agreement for your help desk, please provide a copy with your RFP response.); 5. Toll-free support line;   The following, whilst not compulsory requirements, will be considered an advantage:   1. Users group (i.e. - information about it, where it is held and when. If no, are you planning one?; and 2. Online knowledgebase (i.e. – how it is accessed, who updates it, etc.) |
|  | Click here to enter text. |
|  | Provide the minimum, maximum, and average response times (hours) provided as part of the basic support agreement and average response time for the past twelve (12) months. |
|  | Click here to enter text. |
|  | Provide Help Desk services for technical support and end users. Specify days and hours and any escalation options and procedures. |
|  | Click here to enter text. |
|  | Do you limit the number of WCPP staff who can log a support call? If yes, explain your model and how additional staff can be included and at what incremental cost, if any? If there is no limitation, the maintenance agreement should clearly state this fact. Are you agreeable to include such conditions in our contract? |
|  | Click here to enter text. |
|  | Describe the types of support needed to keep the product under current support and to keep the product enhanced. |
|  | Click here to enter text. |
|  | Do you need remote access to the server to support/maintain it? If yes, describe the method(s) and security used. |
|  | Click here to enter text. |
|  | Will the Bidder contractually agree to: |
|  | |  |  | | --- | --- | | **Term / Condition** | **Yes / No** | | Provide on-site staff for training and implementation | Choose an item. | | Allow the WCPP to approve Bidder’s staff assigned to help with implementation? | Choose an item. | | One year warranty, during which the annual support conditions apply. The first, annual support payment would occur after the warranty period expires | Choose an item. | |
|  | Describe how your software will be licensed to the WCPP (e.g. site license, named users, concurrent users, etc.) |
|  | Click here to enter text. |
| **Software Updates and Distribution** | |
|  | Please describe how WCPP staff will be able to ensure that all system updates and release patches will be kept up to date. Provide information on how “server” and “client-side” software updates are received, processed and distributed to either the server and/or client environment, including but not limited to:   * 1. Backward version compatibility and support of back versions;   2. Timeframe/policy on moving to new versions;   3. Automatic product upgrades or on demand; and   4. Ease of implementation for WCPP staff versus need to contract for services. |
|  | Click here to enter text. |
|  | Describe the product release cycle including:   1. Frequency of upgrades/enhancements or new versions (major and minor version releases); 2. Contents of release; 3. How long release takes to implement; and 4. Use of release notes. |
|  | Click here to enter text. how your software will be licensed to the WCPP |
| **Configuration** | |
|  | How can the WCPP configure the software directly without Bidder involvement? |
|  | Click here to enter text. |
|  | How are local configurations maintained when installing new releases of the software? |
|  | Click here to enter text. |

# Personnel Plan, Experience and Qualifications

| Question No. | Question |
| --- | --- |
|  | The Bidder must provide an overall project organisational structure including both WCPP and Bidder’s staff involvement during the project. Identify the roles and responsibilities of each component of this structure. This includes an appropriate governance structure in which to manage the project. Roles could be, but are not limited to Super Users, Change Manager, Trainer, UAT users, data cleansing personnel, etc. |
|  | Click here to enter text. |
|  | The bidder must use the table provided below to identify the number of staff expected to be committed to the project implementation. Initial identification of project roles has been provided but should be supplemented or revised by Bidders based on their experience in implementing their product in similar environments. |
|  | |  |  |  | | --- | --- | --- | | **Project Role** | **Project Responsibilities** | **No. Required** | | Executive Sponsor(s) |  |  | | Project Manager |  |  | | Project Administrator |  |  | | Functional Process Owners |  |  | | Functional Process Team Participants (per member involvement) |  |  | | Training Coordinator Team Lead |  |  | | Change Management Team Lead |  |  | | Communications Team Lead |  |  | | Other Roles |  |  | | Other Roles |  |  | | Other Roles |  |  | |
|  | Use the table below to identify the number of technical resources expected to be committed by the Bidder to the project implementation based on their experience in implementing their product in similar environments. |
|  | |  |  |  | | --- | --- | --- | | **Project Role** | **No. of years’ Experience** | **Qualifications** | | Project Director |  |  | | Project Manager |  |  | | Business Analyst |  |  | | Solution Architect |  |  | | Application Support |  |  | | System Administrator |  |  | | Security Administrator |  |  | | Other Roles |  |  | | Other Roles |  |  | | Other Roles |  |  | | Other Roles |  |  | |
|  |  |
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**Summary of CV’s submitted**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name of Resource** | | **No of Years’ Experience** | **Role Resource is nominated for** | **Qualifications (Degree; Hon; Masters; PHD)** | **Brief overview of Experience** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |

**Additional Attachments**

Organisational structure of team

CVs of all people involved on the project – *Please note, by signing the Section D of the Declaration of Interest (section 1.3 of this document), Bidders confirm amongst others, that all information disclosed in CV’s are true and accurate.*

# Functional System Requirements

Complete the attached Excel spreadsheet (version 2010) “**ERP Software and Implementation Services – Specifications.xlsx**” which details the requirements that must be addressed by the Bidder’s proposal. The Bidder must complete the excel spreadsheet having followed the instructions below.

These requirements set out in the excel spreadsheet are considered mandatory in implementing the complete solution as defined in **section 5 – Application Software**. Together they define a system that will operate efficiently in the proposed computer environment while providing a high level of flexibility in meeting the WCPP’s current and future data needs. Bidders must replace cells A1:G1 in the first excel sheet (General and Technical) with the Bidder’s Company Name which will be repeated and printed for each subsequent module.

The Priority column includes one of the following entries to indicate the importance of the specification/report to WCPP:

**“H” – High:**

An absolutely necessary feature to be gained from the implementation of a new system. This would be a feature that WCPP already has and uses in its current software, is available and/or tracked in a shadow system (i.e. spreadsheet, document, etc.) or has identified as a future critical requirement.

**“M” – Medium:**

This is a feature that the WCPP would like in the new system that is not currently being tracked or is not existing functionality.

**“L” – Low:**

This would be a feature that, while of interest, is not applicable at this time or something that could be a future deployment.

Each Bidder should review the specifications and reports listed in each subsection and respond as to their availability within the Bidder’s software system. The responses should be entered under the “Availability” column of each form as follows:

| Flag | Description |
| --- | --- |
| **Y** | Functionality is provided out of the box through the completion of a task associated with a routine configurable area that includes, but is not limited to, user-defined fields, delivered or configurable workflows, alerts or notifications, standard import/export, table driven setups and standard reports with no changes. These configuration areas will not be affected by a future upgrade. The proposed services include implementation and training on this functionality, unless specifically excluded in the scope of work, as part of the deployment of the solution. |
| **R** | Functionality is provided through reports generated using proposed Reporting Tools. |
| **M** | Functionality is provided through customisation to the application, including creation of a new workflow or development of a custom interface that may have an impact on future upgradability. |
| **T** | Functionality is provided by proposed third party functionality (i.e. third party is defined as a separate software Bidder from the primary software Bidder). The pricing of all third party products that provide this functionality MUST be included in the **Price Proposal.** |
| **F** | Functionality is provided through a future general availability (GA) release that is scheduled to occur within 1 year of the proposal response. |
| **N** | Functionality is not provided |

**Additional Attachments**

1. Electronic copy of the **ERP Software and Implementation Services – Specifications.xlsx**

# License and Maintenance Agreement

Sample license structure / agreements must be provided in this part of the Bidder’s response for all components of the recommended solution (*i.e.*, hardware, software, operating system, database, etc.). Indicate the basis on how licenses are determined.

# Exceptions and Deviations

For all items marked as “Not Comply” or “Exception” in the in section **14 Bid Response Document Checklist**, a Bidder must fully explain the exceptions in the form below.

|  |  |  |
| --- | --- | --- |
| Bid Response Document Checklist “Not Comply” or “Exceptions” | | |
| **Section No.** | **Title** | **Explanation** |
|  |  |  |
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# Bid Response Document Checklist

| No. | Title | Comply / Does not Comply | Exception | Reference |
| --- | --- | --- | --- | --- |
| 1.1 | Invitation to Bid | Choose an item. |  | Click here to enter text. |
| 1.2 | Valid Original Tax Clearance Certificate | Choose an item. | Click here to enter text. | Click here to enter text. |
| 1.3 | Declaration of Interest | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Details of Entity | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Declaration of the Bidder’s Interest | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Performance Management and Bidder’s past Supply Chain Management Practices | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Duly Authorised Representative to depose to Affidavit | Choose an item. | Click here to enter text. | Click here to enter text. |
| 2.0 | Executive Summary | Choose an item. | Click here to enter text. | Click here to enter text. |
| 3.0 | Company Background | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Audited Financial Statements for the last 2 financial years | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Complete list of Subcontractors | Choose an item. | Click here to enter text. | Click here to enter text. |
| 4.0 | References | Choose an item. | Click here to enter text. | Click here to enter text. |
| 5.0 | Application and Database Software | Choose an item. | Click here to enter text. | Click here to enter text. |
| 6.0 | Technical and Hardware Requirements | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * PowerPoint or Visio diagram of the Technical Architecture | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * PowerPoint or Visio diagram of the Information Architecture | Choose an item. | Click here to enter text. | Click here to enter text. |
|  |  |  |  |  |
| 7.1 | General Implementation Approach | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.2 | Project Management Approach | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.3 | Hardware, Software and Storage Design and installation consulting | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.4 | Data Conversion and Migration Plan | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.6 | Implementation and Training | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.7 | Change Management Approach | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.8 | System Documentation, Manuals and Testing | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.9 | Process Re-Design Assistance | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.10 | Knowledge Transfer to WCPP staff | Choose an item. | Click here to enter text. | Click here to enter text. |
| 7.11 | Microsoft Office Project Plan | Choose an item. | Click here to enter text. | Click here to enter text. |
| 8.0 | Draft SLA including standard terms and conditions | Choose an item. | Click here to enter text. | Click here to enter text. |
| 9.0 | Ongoing Support Services | Choose an item. | Click here to enter text. | Click here to enter text. |
| 10.0 | Personnel Plan, Experience and Qualifications | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Organisational Structure of the Team | Choose an item. | Click here to enter text. | Click here to enter text. |
|  | * Team CVs | Choose an item. | Click here to enter text. | Click here to enter text. |
| 11.0 | Completed the ERP Software and Implementation Services-Specifications excel spread sheet | Choose an item. | Click here to enter text. | Click here to enter text. |
| 12.0 | Licence Structure | Choose an item. | Click here to enter text. | Click here to enter text. |
| 13.0 | Exceptions and Deviation | Choose an item. | Click here to enter text. | Click here to enter text. |
| 14.0 | Electronic Copy of the Technical Proposal containing all relevant documentation | Choose an item. | Click here to enter text. | Click here to enter text. |