



Glenwood Office Park
Cnr. Oberon & Sprite Streets
Faerie Glen 0043
PO Box 73000, Lynnwood Ridge 0040
Tel: (012) 845-2000 – Fax: (012) 348-1089
Website: www.idt.org.za

Request for Quotation

RFQ number: IDTNAT-MSSP2024/25

Description: PROCUMENT FOR THE SUPPORT OF IDT SHAREPOINT 365 ONLINE AND DEVELOPMENT OF CUSTOM APPLICATIONS

Closing date and time: 10 May 2024 @ 12:00pm

Submission of quotations: All quotations must be submitted to IDT tender box at the national office: **Block B, Glenwood Office Park, 294 Sprite Ave, Faerie Glen, Pretoria, 0043** on or before the closing date and time stipulated above. All quotations received after the closing date and time will not be considered.

Compulsory returnable documents that must be submitted with the response for this quotation are the following:

1. National Treasury Central Supplier Database number
MAAA_____
2. Name of Company

3. Unique SARS Tax Compliance Pin Number (submit valid letter)
4. Duly completed and signed: SDB 4 (**Bidder's Declaration**), attached in this RFQ document.
5. Duly completed and signed: SDB 6.1 (Preference Points Claim Form in Terms of The Preferential Procurement Regulations 2022), attached in this RFQ document.

Compulsory returnable document: SBD 6.1

Source Documents to be submitted with the Bid or RFQ

- | | |
|-------------------------|--|
| *CIPC Document | (Company Registration Document will be required for verification (CIPC DOC)) |
| *Woman | (Originally Certified ID Document) |
| *Youth | (Originally Certified ID Document) |
| *People with Disability | (Letter from the Dr. Confirming the Disability) |
| *Black Ownership | (Originally Certified ID Document) |

Non-submission of Source documents will result in the allocation of zero points for specific goals



INDEPENDENT DEVELOPMENT TRUST

TERMS OF REFERENCE THE INDEPENDENT DEVELOPMENT TRUST

1. INTRODUCTION

The Independent Development Trust invites bidders for the support of Microsoft 365 SharePoint online and the development and customization of the IDT Business Applications.

2. MANDATORY RETURNABLE DOCUMENTS

- Proof of Microsoft Partnership
- Proof of Personnel Qualification
- and must comply with the table below by providing a CV with certified copies of Qualifications.

Note:

(i) Failure to submit any of the above documents/requirements shall result in disqualification of the bid.

(ii) If any of the Directors are in the Employment of the State shall result in disqualification of the bid.

(iii) If any of its Directors are Listed on the Register of Defaulters shall result in disqualification of the bid.

(iv) In the case of a Bidder, who during the last ten (10) years has been Terminated on Previous Contracts with the IDT shall result in disqualification of the bid.

The IDT will assess all bids received based on its procurement policy in the event that information is required from the bidder/s, the IDT reserves its rights to request the information which shall be submitted within seven (7) working days from request and failure to submit will result in disqualification.

Only bidders who are competent in the advertised work and who have achieved the minimum functionality threshold as well as price and specific goals will be eligible to be appointed and deliver the work as detailed in the **Scope of Work Section**

3. FUNCTIONALITY CRITERIA

Criteria	Total Points Allocated
Company Experience in SharePoint Development	25 points
Microsoft Partnership Level	25 points
Personnel SharePoint Certification	30 points
Personnel Power Automate Certification and Experience	10 points
Personnel Adoption & Change Management Experience	10 Points
TOTAL POINTS	100 Points
NB: Minimum qualifying functionality threshold is 80 points out 100.	

Only bidders who obtain 80 points or higher on the functionality threshold will be eligible to be evaluated further on price and empowerment goals.

Bid documents may be downloaded from the IDT's website as follows: www.idt.org.za as well as on the e-tenders portal, www.etenders.gov.za from **29 April 2024 to 10 May 2024 @ 11:59am**. Tenders must only be submitted on the tender documentation that is downloaded from the stipulated websites. The retyping of the tender document is not permitted.

All SCM and Technical enquiries relating to this bid must be directed to idtsharepointbid@idt.org.za during office hours **(08h30 – 17h00)** weekdays.

On submission of Tender Documents, the bidder must submit a signed original bid document in hard copy.

Requirements for sealing, addressing, delivery, opening and assessment of bids are stated in the Tender Data. (Refer to Section T1.2).

The bid closing date is **10 May 2024 by no later than 12:00pm** and bids shall be submitted to the IDT tender box at the national office: **Block B, Glenwood Office Park, 294 Sprite Ave, Faerie Glen, Pretoria, 0043**

Telegraphic, telephonic, telex, facsimile, e-mail and late bids **WILL NOT** be accepted.

4. Bid Data

The Standard Conditions of Tender make several references to the Tender Data for details that apply specifically to this tender. The Tender Data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the standard conditions of tender. Each item of data given below is cross-referenced to the clause in the Standard Conditions of Tender to which it mainly applies.

5. List of Returnable Documents

List of returnable documents are for ensuring that everything the employer requires a tenderer to submit with his tender is included in, or returned with, his tender submission.

Tick below if returnable document is attached or completed properly.

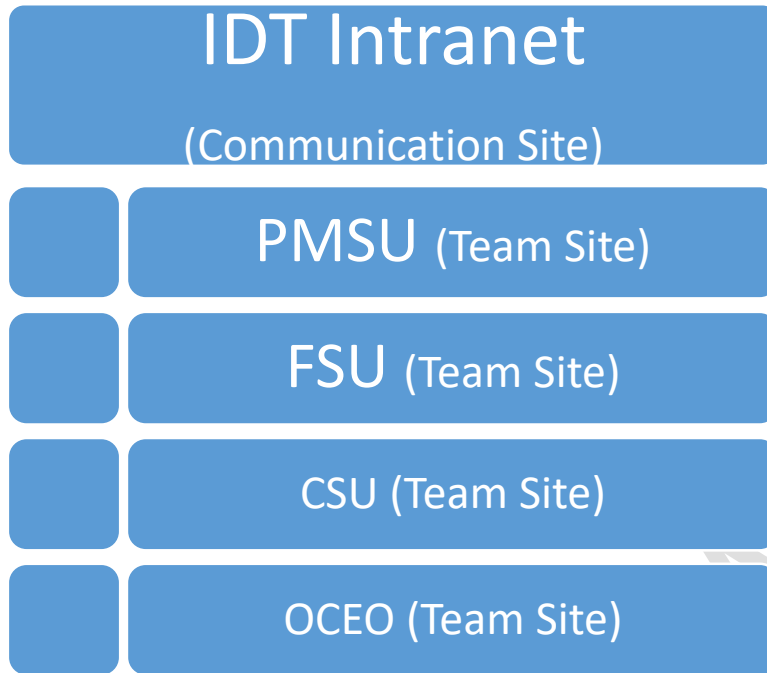
#	LIST OF RETURNABLE DOCUMENTS	TICK IF ATTACHED
1	Preference Points Claim Form SBD 6.1	
2	Tax Clearance Certificate or Unique PIN	

3	Joint Venture Agreement between Parties	
4	Parties Cancelled Cheque or Original Bank Letter	
5	Declaration of Interest Form SBD 4	
6	Certificate of Independent Bid Determination	
7	Declaration of Bidder's Past Supply Chain Management Practices	
8	Certificate of Authority for Signatory	
9	Microsoft Partnership Certificate	
10	Project Experience (Reference Letters)	
11	Key Personnel CVs and Certified Certificates	
12	Proposed project methodology and plan outlining how IDT's requirements will be implemented, Bidder's proposed post-implementation support plan	
13	Fully Priced Schedule	

6. Scope of Work

The detail scope of work for the project include the following deliverables;

- 1) Designing and Developing custom SharePoint solutions based on business requirements,
- 2) Creating and Configuring SharePoint sites (5) and hub sites, number of lists, libraries, multiple Power Automate workflows and web parts for front-end use
- 3) Creating workflows for approvals and notifications using Power Automate
- 4) Creating Team sites and Communication sites
- 5) Developing custom forms and templates in SharePoint online
- 6) Developing and implementing SharePoint security and access controls
- 7) Accredited Microsoft SharePoint training for of 2 x systems administrators.
 - a) The following should be covered in the training.
 - i) Modules
 - ii) Learning Material
 - iii) Attendance registers and certificates
 - iv) Exam Vouchers
 - v) The Service Provider must be a Microsoft certified training or be affiliated with the certified trainer.
- 8) Embedding of AI Videos for personnel onboarding, business and process manuals



Picture 1: Types of sites to be developed.

The table below summarises the minimum functionality of all the five sites

UNIT	SITE TYPE	LISTS	FORMS	DOCUMENTS	WORKFLOWS and POWER AUTOMATE
IDT	Communication	None	None	None	None
PMSU	Team	<ul style="list-style-type: none"> • Purchase Order Adjustments • Contract Registry • Submissions 	YES	YES	YES
FSU	Team	<ul style="list-style-type: none"> • Budget Transfers • Submissions 	YES	YES	YES
CSU	Team	<ul style="list-style-type: none"> • Contract Registry • Submissions 	YES	YES	YES
OCEO	Team	<ul style="list-style-type: none"> • Submissions 	YES	YES	YES

Table 1: SharePoint sites

7. REQUIREMENTS

In order to be considered for the bid, the bidders are required to submit the following documentation with the bid

- **Company Experience**
 - Provide a minimum of four contactable references not older than five (5) years from current and or previous clients where similar work was executed. The reference must indicate the Name of the client with client letterhead and branding, the contact person indicating position, and contact details.
- **Microsoft Partnership**
 - The bidder must submit and attach a copy of the Microsoft partnership letter from Microsoft with the following competencies (Application Integration, Cloud Productivity, Collaboration, and Content)

- **Personnel SharePoint Experience**
 - The bidder must submit proof of personnel with qualification in Information Technology / Information Systems and Certification in any of the following
 - Microsoft 365 Certified: Teamwork Administrator Associate
 - Microsoft 365 Certified: Enterprise Administrator Expert
- **Power Automate Certification**
 - The bidder must submit proof of personnel with certification in any of the following:
 - Microsoft Certified: Power Platform Developer Associate
 - Microsoft Certified: Power Platform Functional Consultant Associate
 - Microsoft Certified: Power Platform Solution Architect Expert
- **Adoption & Change Management Experience**
 - The bidder must submit proof of personnel with Certification in any of the following
 - Microsoft Service Adoption Specialist Certification
- **Project Management**
 - Project Manager with a bachelor's degree in management, IT, or any other relevant qualification

8. EVALUATION

CRITERIA	TOTAL POINTS	FUNCTIONALITY	SCORE
Company Experience	25 POINTS	4 Reference Letters	25 points
		3 Reference Letters	20 points
		2 Reference Letters	10 points
		1 Reference Letters	5 points
		0 Reference Letters	0 points
Microsoft Partnership	25 POINTS	Gold	25 points
		Silver	10 points
Personnel SharePoint Certification	30 POINTS	+5 years	30 points
		3- 4 years	20 points
		1 – 2 years	10 points
Power Automate Experience	10 POINTS	+3 years	10 points
		2- 3 years	5 points
Adoption & Change Management Experience	10 POINTS	+3 years	10 points
		2- 3 years	5 points

For further evaluation, the minimum average score for functionality is 80 points.

9. PRICING

ACTIVITY	RESOURCE ALLOCATED	HOURLY RATE	TOTAL HOURS	TOTAL
Planning				
User Requirements				
Development				
Testing				
Implementation				
Skills Transfer				
Close-Out				
Sub Total				
VAT				
GRAND TOTAL				

Service providers must quote the IDT a total price inclusive of VAT for the service that will be rendered, and the quoted price must be valid for at least thirty (30) days after the closing date of this Request for Quotation.

NB: No query shall be allowed 12 hours prior to the closing date and time of this Request for quotation.

NB: The Independent Development Trust Reserve the right to withdraw or cancel this RFQ without prior notification to the respondents

CONFIDENTIAL

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise, employed by the state?

YES / NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution?

YES / NO

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? YES / NO

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read, and I understand the contents of this disclosure.

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and

during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

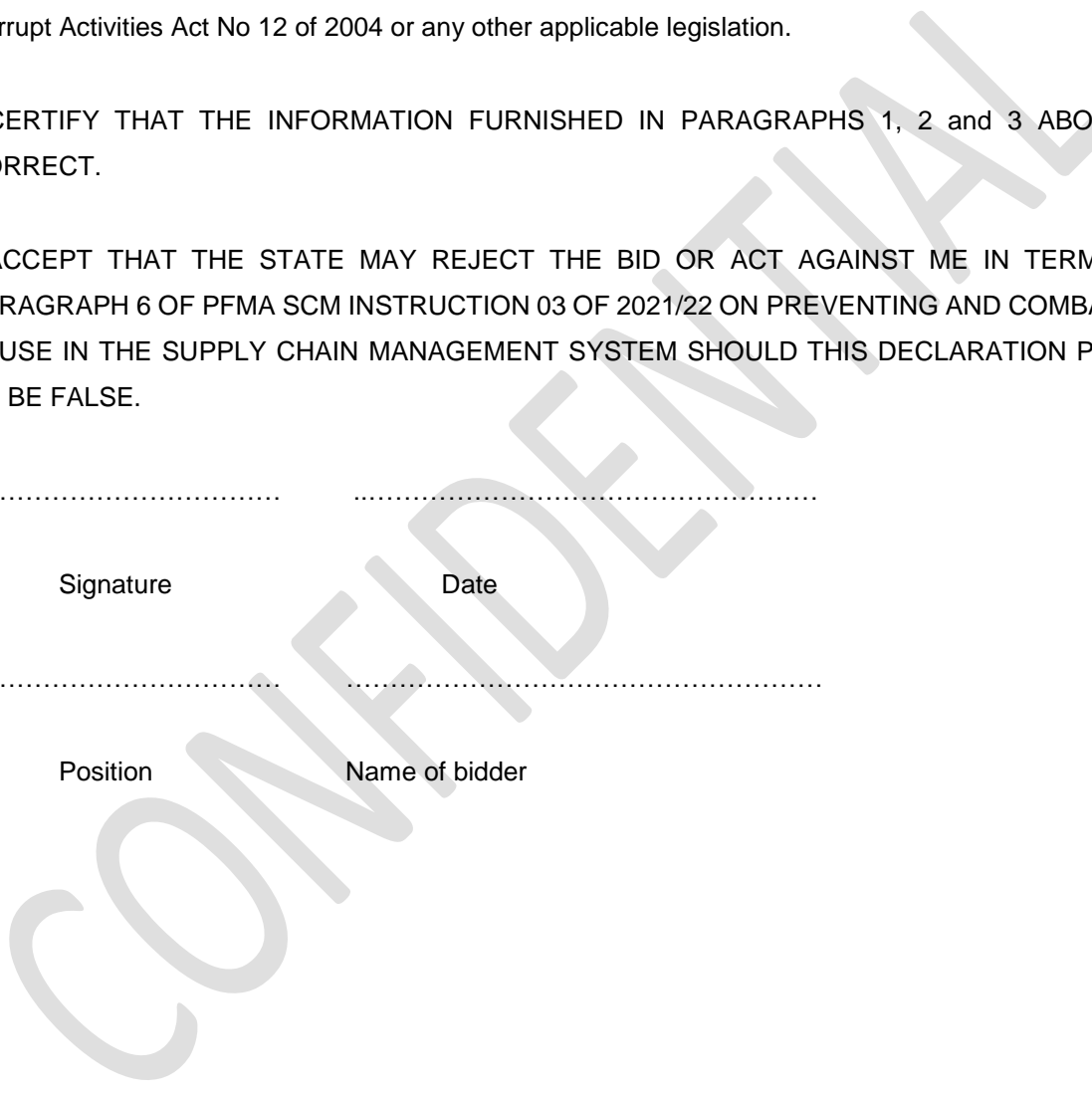
3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature Date

.....
Position Name of bidder





PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

The applicable preference point system for this tender is the 80/20 preference point system.

- a) 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS	
PRICE	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black People	2	4
Total points for Price and SPECIFIC GOALS	100	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “**tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) \text{ or } Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

- Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \text{ or } Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

- Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black People	2	4		

Source Documents to be submitted with the Bid or RFQ

- *CIPC Document (Company Registration Document will be required for verification (CIPC DOC))
- *Woman (Originally Certified ID Document)
- *Youth (Originally Certified ID Document)
- *People with Disability (Letter from the Dr. Confirming the Disability)
- *Black Ownership (Originally Certified ID Document)

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....

CONFIDENTIAL