

---

# OPEN TENDER

---

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO –  
PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS)  
FOR THE INDEPENDENT DEVELOPMENT TRUST**

**TENDER NUMBER: [IDT-NAT-Eppmis-2024](#)**

**Closing Date:**

**Monday 27<sup>th</sup> of MAY 2024 at 12h00pm**

**ISSUED BY: INDEPENDENT DEVELOPMENT TRUST**

**Glenwood Office Park, Cnr Oberon and Sprite Street. FAERIE GLEN, 0045**

**(012) 845 2000. [www.idt.org.za](http://www.idt.org.za)**

## Table of Contents

<b>1. TENDER DETAILS</b> .....	1
1.1 Invitation to Bid .....	2
1.2 Tender Data .....	4
1.3 Evaluation Criteria .....	8
<b>1.3.1 STAGE 1: Compulsory Requirements</b> .....	8
<b>1.3.2 STAGE 2 (Phase I): Evaluation on Functionality / Technical Requirements</b> .....	8
<b>1.3.3 STAGE 2 (Phase II): Bidders Presentation</b> .....	10
<b>1.3.4 STAGE 3 Evaluation on the 90/10 or 80/20 Preference Points System</b> .....	11
<b>1. SUBMISSION DETAILS</b> .....	15
<b>2.1 List of Compulsory Documents to be submitted with the tender.</b> .....	15
<b>2.2 Invitation to Bid (SBD 1)</b> .....	16
<b>2.3 Declaration of Interest (SBD 4)</b> .....	19
<b>2.4 Preference Points Claim Form (SBD 6.1)</b> .....	22
<b>2.5 Cost Form</b> .....	29
<b>2.6 Company Experience and Track Record</b> .....	32
<b>2. IDT's RESERVATION OF RIGHTS</b> .....	34
<b>3. IDT PORTFOLIO PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS)</b> .....	35
3.1 Project Overview .....	35
3.2 Objectives of the Project.....	35
3.3 Scope of the Project.....	36
<b>4. OVERVIEW OF IDT</b> .....	37
4.1 Who is IDT ?.....	37
4.2 Organisational Structure.....	37
4.3 Governance Structure.....	38
4.4 Portfolio Project System Stakeholders .....	38
4.5 User Roles.....	39
<b>5. OVERVIEW OF IDT PROGRAMME AND PROJECT MANAGEMENT PROCESSES</b> .....	43
<b>6. KEY FUNCTIONAL REQUIREMENTS</b> .....	50
<b>7. IDT INFORMATION AND DATA FLOW</b> .....	56
<b>8. GENERAL CONDITIONS OF CONTRACTS</b> .....	58

## 1. TENDER DETAILS

## 1.1 Invitation to Bid

The Independent Development Trust (**hereinafter “IDT”**) invites companies with extensive experience in the commissioning of **Portfolio – Project management Information Systems** aligned to the Public Sector Infrastructure Project Management requirements.

Driven by the IDT Vision of being “A leading public sector developmental programme implementation management agency”, continuous improvement to institute best programme and project management practices in supporting various client’s department in the delivery of social and basic services infrastructure and related development objectives, is imperative to achieve efficiency to meet the client demands. The IDT initiated processes in the improvement and integration of portfolio, programme and project delivery management systems and processes governed by the Built Environment and the Public Sector Standards and Practices.

The objective of the project is to acquire an (Artificial Intelligence) AI-ready Portfolio Project Management System and configuration and customization to the IDT Programme/Project Management requirements. The application should include workflows in line with the IDT programme and project management processes as well as automation, and it should be able to shorten the IDT’s project delivery periods by eliminating inefficiencies and creating a robust electronic “audit-trail”. The configured Solution must be aligned with the Public Sector IDMS and FIPDM Standards and Processes. The scope of the project includes commissioning / implementation of the system and a minimum of three (3) years maintenance and support as part of the proposal.

A compulsory briefing session will be held on **Thursday, the 9<sup>th</sup> of May 2024 at 10:00** on a virtual platform. Link to join meeting is highlighted below.

**Microsoft Teams** [Need help?](#)

[\*\*Join the meeting now\*\*](#)

The Tender closes on **Monday, 27<sup>th</sup> May 2024 at 12:00pm**. Original bids must be submitted and deposited in the Tender Box at the **IDT Head Office, Corner Oberon and Sprite Streets, Glenwood Office Park, Faerie Glen, 0043**. Telegraphic, telephonic, telex, facsimile, e-mail, and late tenders WILL NOT be accepted.

Functionality criteria scoring will be evaluated in two (2) phases. Only bidders scoring 50 points (out of 60 points) and above under Phase one (1) of functionality criteria will be eligible to be

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

evaluated further under Phase two (2) which entails undertaking site visit to current/previous clients that use/used the existing proposed Solution. It is expected from the bidders to inform their client/s of potential site visit.

Only bidders that again obtain a combination of minimum total 70 points under functionality will be evaluated on Price and BBB-EE based on 80/20 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2022.

**Table1:** Phase 1 evaluation under functionality criteria is as follows:

<b>Phase</b>	<b>Criteria</b>	<b>Points Allocation</b>
<b>Phase I</b>	Bidders Experience in the e-PPMIS Commissioning / Implementation	30 points
	Proposed Solution Partnership / Implementation Recognition (OEM Accreditation)	5 points
	Dedicated Project Team Members	35 points
	System Proposal linked to IDT Requirements	15 points
	<b>Total</b>	<b>85 points</b>
	<i>Only bidders scoring <b>70 points</b> and above under these Phase of functionality criteria will be eligible and invited to be evaluated under second Phase which entails the interview and presentation process with the client (IDT).</i>	
<b>Phase II</b>	Site visits and Presentation	15 points
	<b>Total</b>	<b>100 points</b>
	<i>Only bidders scoring <b>70 points</b> in <b>Phase I</b> will be eligible to further evaluation on Price and Specific Goals based on 80/20 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2022 <b>provided they score a minimum of 10 points in Phase II.</b></i>	

Tender documents will be available from the IDT website at [www.idt.org.za](http://www.idt.org.za) and from the National Treasury e-Tender Portal at [www.etenders.gov.za](http://www.etenders.gov.za) free of charge from **Thursday, 02<sup>nd</sup> of May 2024.**

Queries should be directed to the following email address for both **technical** and **SCM** related;

[e-PPMISQueries@idt.org.za](mailto:e-PPMISQueries@idt.org.za)

## 1.2 Tender Data

The IDT Standard Conditions of Tender make several references to the Tender Data for details that apply specifically to this bid. The Bid Data shall have precedence in the event 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.

<b>Clause number</b>	<b>Tender Data / Clause description</b>
1.2.1	<p>The Employer is Independent Development Trust (<b>hereinafter “IDT”</b>)</p> <p><b>Physical address:</b></p> <p>IDT Head Office</p> <p>Corner Oberon and Sprite Streets</p> <p>Glenwood Office Park</p> <p>Faerie Glen 0043</p> <p>Tel: (012) 845 2000 - Fax: 086 589 6855</p> <p>Website: <a href="http://www.idt.org.za">www.idt.org.za</a></p>
1.2.2	<p>Only those bidders who satisfy the following compulsory requirements are eligible to submit tenders:</p> <ul style="list-style-type: none"> <li>• Submission of Standard Bidding Documents <ul style="list-style-type: none"> <li>○ SBD 1 (Invitation to Bid)</li> <li>○ SBD 4 (Bidders Declaration Form)</li> <li>○ SBD 6.1 (Preference Points Claims Form in Terms of the Preferential Procurement Regulations 2022)</li> <li>○ Letter of Authority to sign bid document (for companies with more than one director)</li> </ul> </li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

Clause number	Tender Data / Clause description
1.2.3	<p>A compulsory briefing session will be held on <b>09 May 2024 at 10:00</b> virtually (Link provided below)</p> <p><b>Microsoft Teams</b> <a href="#">Need help?</a></p> <p><a href="#">Join the meeting now</a></p>
1.2.4	<p>Prospective bidders are encouraged to submit their requests for clarification in writing not later than 5 calendar days before the closing date.</p>
1.2.5	<p>The tender shall be for the entire scope as defined in the Terms of Reference</p>
1.2.6	<p>The Tender Validity period is <b>90 days from the closing date.</b></p>
1.2.7	<p>The Tender shall be submitted as follows in one envelope.</p> <ol style="list-style-type: none"> <li><b>1. Hard Copies of the Bid following the structure in <u>section 1.2.8</u> below</b></li> <li><b>2. Memory stick of the copy of the Bid</b></li> </ol>
1.2.8	<p>To facilitate the tender evaluation process, the bidders are encouraged to compile their Tender Document following the order below.</p> <p><b>PART 1:</b> Compulsory Documents</p> <p><b>PART 2:</b> Bidders experience in e-PPMIS Commissioning</p> <p><b>PART 3:</b> Proof of Partnership / Implementation / OEM Recognition</p> <p><b>PART 4:</b> Dedicated Project Team members (CVs and Certified Certificates of qualification)</p> <p><b>PART 5:</b> System Proposal</p> <p><b>PART 6:</b> Costing Breakdown (using the attached form in the bid)</p>
1.2.9	<p>The Invitation to Tender number is <b>IDT-NAT-Eppmis-2024</b></p>
1.2.10	<p>The deadline for tender submission is <b><u>Friday 24<sup>th</sup> of MAY 2024 at 12h00pm</u></b></p>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

Clause number	Tender Data / Clause description
1.2.11	Public opening of the Bids documents is APPLICABLE
1.2.12	<p>The tender shall be addressed to the Employer with a cover page indicating the following:</p> <p>INDEPENDENT DEVELOPMENT TRUST (IDT)</p> <p align="center"><b>PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST</b></p> <p>MARKED AS TENDER REF: <a href="#">IDT-NAT-Eppmis-2024</a></p> <p><b>BIDDER NAME:</b> _____</p> <p><b>COMPANY REGISTRATION NUMBER:</b> _____</p> <p><b>Physical Address for delivery of tender:</b></p> <p>IDT Head Office Glenwood Office Park Corner Oberon and Sprite Streets Faerie Glen 0043</p>
1.2.13	<p><b>The place for delivery of the tender is:</b></p> <p>The IDT Tender Box located at (main reception at the physical address given above)</p>
1.2.14	The Bids will be evaluated on comparative basis in terms of IDT SCM Policies and Procedures.

PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST

Clause number	Tender Data / Clause description
1.2.14	<p>Functionality criteria scoring will be evaluated in two (2) phases.</p> <ul style="list-style-type: none"><li>• Only bidders scoring 70 points (out of 85 points) and above under Phase one (1) of functionality criteria will be eligible to be evaluated further under</li><li>• Phase two (2) which entails undertaking site visit to current/previous clients that use/used the existing proposed Solution. It is expected from the bidders to inform their client/s of potential site visit.</li><li>• Only bidders scoring 70 points in Phase I will be eligible to further evaluation on Price and Specific Goals based on 80/20 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2022 <b>provided they score a minimum of 10 points in Phase II.</b></li></ul>



## 1.3 Evaluation Criteria

### 1.3.1 STAGE 1: Compulsory Requirements

Only those bidders who satisfy the following compulsory requirements are eligible to submit tenders:

- Submission of Standard Bidding Documents
  - **SBD 1** (Invitation to Bid)
  - **SBD 4** (Bidders Declaration Form)
  - **SBD 6.1** (Preference Points Claims Form in Terms of the Preferential Procurement Regulations 2022)
  - **Cost Form**

### 1.3.2 STAGE 2 (Phase I): Evaluation on Functionality / Technical Requirements

As part of the evaluation process of the current existing systems, IDT may undertake site visit to current/previous clients that use/used the bidders existing proposed Electronic System. It is expected from the bidders to inform their client/s of potential site visit.

All corresponding supporting documents must be compiled as per Instruction 1.2.8 as per Tender Data in Section 1.2 above. Submissions will be scored according to the scoring sheet in Table 2 below.

**Table 2: Functionality Scoring**

VARIABLES	TOTAL POINTS	CRITERIA	DESCRIPTION	POINTS
<b>1. BIDDERS EXPERIENCE IN COMMISSIONING AND / OR IMPLEMENTATION OF PORTFOLIO-PROJECT MANAGEMENT SYSTEM</b>	<b>30 points</b>	3 Reference Letters	Proof of <b>VERIFIABLE</b> reference letters indicating Portfolio Project System projects completed (in client letter head)	30 points
		2 Reference Letters		20 points
		1 Reference Letter		10 points
		0 Reference Letters		0 points
<b>2. PROPOSED SOLUTION PARTNERSHIP / IMPLEMENTATION RECOGNITION (OEM ACCREDITATION)</b>	<b>5 points</b>	Proof of Recognition submitted.	Proof of Solution recognition or OEM endorsement of projects implemented using <b>PROPOSED SOLUTION</b>	5 points
		Proof of Recognition Not submitted.		0 points
<b>3. DEDICATED TEAM MEMBERS</b>  (With CVs and Proposed Solution Certification in any of the following)	<b>35 points</b>	PROJECT LEAD	<b>Project Lead</b> (+10 years' experience in System Implementation and Project Management)	5 points
			<b>Project Lead</b> (between 5- and 10 years' experience in	3 points

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

VARIABLES	TOTAL POINTS	CRITERIA	DESCRIPTION	POINTS
<ul style="list-style-type: none"> <li>• Core Product Certification</li> <li>• System Administrator Certification</li> <li>• Project Management Certification</li> </ul>			System Implementation and Project Management	1 point
			<b>Project Lead</b> (Less than 5 Years' Experience in System Implementation and Project Management)	
		BUSINESS ANALYST	<b>Business Analyst</b> (+10 years' experience in System implementation and Business Analysis)	5 points
			<b>Business Analyst</b> (between 5 and 10 years' experience in System implementation and Business Analysis)	3 points
			<b>Business Analyst</b> (less than 5 years' experience in System implementation and Business Analysis)	1 point
		SOLUTION ARCHITECTURE	<b>Solutions Architect</b> (+10 years' experience in System implementation and integration)	5 points
			<b>Solutions Architect</b> (between 5 and 10 years' experience in System implementation and integration)	3 points
			<b>Solutions Architect</b> (less than 5 years' experience in System implementation and integration)	1 point
		SOFTWARE DEVELOPER	<b>Software Developer</b> (+10 years' experience in Software Development)	5 points
			<b>Software Developer</b> (between 5 and 10 years' experience in Software Development)	3 points
			<b>Software Developer</b> (less than 5 years' experience in System Software Development)	1 point
		SOFTWARE TESTER	<b>Solutions Tester</b> (+10 years' experience in Software Testing)	5 points
			<b>Solutions Tester</b> (between 5 and 10 years' experience in Software Testing)	3 points
			<b>Solutions Tester</b> (less than 5 years' experience in System Software Testing)	1 point
		BUSINESS INTELLIGENCE AND DATA ANALYST	<b>Business Intelligence and Data Analyst</b> (+10 Years' Experience in Business Intelligence and Data Analysis)	5 points

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

<b>VARIABLES</b>	<b>TOTAL POINTS</b>	<b>CRITERIA</b>	<b>DESCRIPTION</b>	<b>POINTS</b>
			<b>Business Intelligence and Data Analyst</b> (between 5- and 10 years’ experience in Business Intelligence and Data Analysis)	3 points
			<b>Business Intelligence and Data Analyst</b> (Less than 5 Years’ Experience in Business Intelligence and Data Analysis)	1 point
		GIS SPECIALIST	<b>GIS Specialist</b> (+10 Years’ Experience in GIS)	5 points
			<b>GIS Specialist</b> (between 5- and 10 years’ experience in GIS)	3 points
			<b>GIS Specialist</b> (Less than 5 Years’ Experience in GIS)	1 point
<b>4. SYSTEM PROPOSAL LINKED TO IDT REQUIREMENTS (section 9)</b>	<b>15 points</b>	Meets All the Requirements (Proposed Solutions addresses all IDT Portfolio-Project Stages and Requirements <b>(13/13) 100%</b> )	All IDT requirements are considered in the proposal	15 points
<b>TOTAL</b>				<b>85 POINTS</b>

**1.3.3 STAGE 2 (Phase II): Bidders Presentation**

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

IDT as part of the evaluation process will undertake site visit to current/previous clients that use/used their existing proposed Solution. It is expected from the bidders to inform their client/s of potential site visit.

The Table below, specify in detailed the functionality/technical criteria to be considered under the evaluation of phase one (2): Bidders Presentation

**Table 2: Presentation by Bidders**

VARIABLES	TOTAL POINTS	CRITERIA	DESCRIPTION	POINTS
<b>1. BIDDERS PRESENTATION</b>	<b>15</b>	Systems response to current / previous client requirements	Bidders Proposed System Presentation	5
		System AI Capability demonstration		5
		Mandatory Functionality Requirements Demonstration <b>(Internal / Licence users and External non license User’s journey)</b>		5

0 - 5	0	1	3	4	5
	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Very Good</b>	<b>Excellent</b>

*Only bidders scoring 70 points in Phase I will be eligible to further evaluation on Price and Specific Goals based on 80/20 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2022 **provided they score a minimum of 10 points in Phase II.***

**1.3.4 STAGE 3 Evaluation on the 90/10 or 80/20 Preference Points System**

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

Stage 3 entails the process of evaluation on price and Empowerment Goals based on the 80/20 or 90/10 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2022.

Certified copy of a **BBBEE certificate** issued by a **SANAS Accredited Agency** or a **Sworn Affidavit** in the prescribed format by the National Treasury or **Electronic Affidavit** Issued by **CIPC for EMEs and QSEs**. Service Providers that fail to submit credentials shall **NOT** be allocated preference points in line with the PPPF-Act regulations of 2022.

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

**3.1.1. POINTS AWARDED FOR PRICE**

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

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

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)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system)	Number of points claimed (80/20 system)

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

	<b>(To be completed by the organ of state)</b>		<b>(To be completed by the tenderer)</b>	<b>(To be completed by the tenderer)</b>
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black People	2	4		

## **1. SUBMISSION DETAILS**

*The returnable documents shall be submitted in the sequence specified under the Returnable Documents Schedule (section 2.2).*

### **2.1 List of Compulsory Documents to be submitted with the tender.**

“Compulsory documents” shall be submitted by the bidders. If any of the below documentation is not supplied will lead to the immediate **disqualification** of the bidder. Certified copies of documents shall be submitted in original and not older than 3 months from the advertisement date.

<b>1</b>	Invitation to Bid (SBD 1)
<b>2</b>	Declaration of Interest (SBD 4)
<b>3</b>	Preference points claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)
<b>4</b>	Attendance to the compulsory briefing meeting and completion of the attendance register with the Companies details and contact person.
<b>5</b>	Letter of Authority to sign the Bid (if more than one director in the company)
<b>8</b>	<p>Signed Detailed Financial Proposal</p> <p style="padding-left: 40px;">The compulsory detailed financial proposal shall be submitted by the bidders in the format that have been specified in the returnable scheduled below. Failure to submit the financial returnable document will lead to disqualification.</p>



**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

**2.2 Invitation to Bid (SBD 1)**

**PART A  
INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST</b>					
BID NUMBER:		CLOSING DATE	27 MAY 2024	CLOSING TIME:	12H00
DESCRIPTION					
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS			E-MAIL ADDRESS		
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		<b>OR</b>	CENTRAL SUPPLIER DATABASE No:	MAAA

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

<p><i>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?</i></p>	<p><input type="checkbox"/>Yes                      <input type="checkbox"/>No</p> <p>[IF YES ENCLOSE PROOF]</p>	<p><i>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?</i></p>	<p><input type="checkbox"/>Yes                      <input type="checkbox"/>No</p> <p>[IF YES, ANSWER THE QUESTIONNAIRE BELOW]</p>
--	--	---	--

**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  YES  NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA?  YES  NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  YES  NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  YES  NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?  YES  NO

**IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

PART B  
TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

(Proof of authority must be submitted e.g. company resolution)

DATE: .....

**2.3 Declaration of Interest (SBD 4)**

**SBD 4**

**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<sup>1</sup> 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

---

<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

--	--	--

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<sup>2</sup> 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.

\_\_\_\_\_

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

- 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

<sup>3</sup> **Joint venture or Consortium 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.**

*2.4 Preference Points Claim Form (SBD 6.1)*

**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**

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) **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.

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

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:

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

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

#### 4.3. 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:

$$80/20 \quad \text{or} \quad 90/10$$
$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{min}$  = Price of lowest acceptable tender

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

4.4.1. POINTS AWARDED FOR PRICE

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

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80} \left( \mathbf{1 + \frac{Pt - Pmax}{Pmax}} \right) & \mathbf{or} & \mathbf{Ps = 90} \left( \mathbf{1 + \frac{Pt - Pmax}{Pmax}} \right) \end{array}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

5. POINTS AWARDED FOR SPECIFIC GOALS

5.1. 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:

5.2. 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—

(c) 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

(d) 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,

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

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 People (Originally Certified ID Document)

**DECLARATION WITH REGARD TO COMPANY/FIRM**

5.3. Name of company/firm.....

5.4. Company registration number: .....

5.5. 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]

5.6. 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 –

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

- (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.

.....	
<b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

**2.5 Cost Form**

**To be submitted for Costing Breakdown**

<b>NAME OF BIDDER</b>	
-----------------------	--

Bidders are required to provide a detailed financial proposal as per table below based on the scope of work specified. Failure to submit the detailed financial proposal for the project will lead to disqualification.

ITEM DESCRIPTION	COST
<b>1. PROJECT INITIATION (KICK-OFF)</b>	
<b>2. PLANNING</b>	
<b>3. SYSTEM ARCHITECTURE MAPPING, DESIGN AND CUSTOMISATION</b>	
<b>4. WEB APPLICATION / UI DEVELOPMENT / CONFIGURATION</b>	
<b>5. FORM BUILDER / DEVELOPMENT</b>	
<b>6. AI CAPABILITY / SYSTEM INTEGRATION (AD, IDT Financial System)</b>	
<b>7. SYSTEM TESTING TO PRODUCTION</b>	
<b>8. SYSTEM Go-Live (Deployment)</b>	
<b>9. SKILLS TRANSFER</b>	
<b>10. MANUAL DEVELOPMENT</b>	
<b>11. END-USER TRAINING</b>	
<b>12. SYSTEM ADMIN TRAINING</b>	
<b>13. PROJECT MANAGEMENT</b>	
<b>14. LICESING (200 USERS max)</b> <i>The number of users will be determined by the actual number required during implementation. Bidders are required to quote on the maximum of 200 user annually</i>	
10.1 Year 1	
10.2 Year 2	

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

ITEM DESCRIPTION	COST
10.3 Year 3	
10.4 Year 4	
<b>15. SYSTEM MAINTENANCE AND SUPPORT</b>	
11.1 Year 1	
11.2 Year 2	
15.3 Year 3	
<b>TOTAL</b>	
<b>VAT</b>	
<b>GRAND TOTAL</b>	

*Any engagement with consultants, the bidders are requested to take note of the following remunerated rates.*

- *Determined in the “Guideline for Fees”, issued by the South African Institute of Chartered Accountants (SAICA); or*
- *6.8.2 Set out in the “Guides on Hourly Fee Rates for Consultants: by the Department of Public Service and Administration (DPSA); or*
- *6.8.3 Prescribed by the body – regulating the profession of the consultant.*

Signed

Date

.....

.....

Name

Bidder

.....

.....





**2.6 Company Experience and Track Record**

The Bidder should provide details of their relevant experience on similar scale projects implemented in the past 5 years. In support bidders are to complete the "Project Experience" schedule below and attach thereto copies of Clients Reference Letter (refer to the Letter minimum requirements)

PROJECT NAME	PROJECT DESCRIPTION	CLIENT NAME	COMPLETION DATE	PROJECT VALUE
A.				
B.				
C.				
D.				
E.				

**The reference letters minimum requirements:**

The Bidder shall provide client reference letter detailing the bidder performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference” should be issued by each of the respective Clients in the client letter heads. Failing to submit the information requested will result in losing points under the evaluation process.

The following information should be included in the Clients Reference Letter for each project:

- Project Name
- Project Scope
- Project Cost
- Project Duration
- ....Any other remarks considered necessary to assist in evaluation of the tenders

IDT as part of the evaluation process may undertake site visit to current/previous clients that use/used their existing proposed Solution. It is expected from the bidders to inform their client/s of potential site visit.

## 2. IDT's RESERVATION OF RIGHTS

- i. IDT reserves the right to subject Bidders and their facilities to assessment as part of the evaluation process or as a condition to contract award.
- ii. Consequent to the evaluation of Bidder's proposals, IDT reserves the right, with the permission of the IDT Board or the relevant delegated authority, to enter into negotiations with one or more of the preferred Bidders (as determined by IDT following evaluation of the tender proposals) for the whole or part of the services.
- iii. In addition, IDT may utilise the information received from the Bidder's responses to this tender for the purposes of undertaking any future procurement for other projects. Such procurement may be undertaken through negotiation with one or more parties (which may include the successful Bidder and/or any one or more Bidders who submit a tender in response to this enquiry) or any other procurement strategy.
- iv. IDT reserves the right to cancel or withdraw this tender following the National Treasury regulations.
- v. IDT reserves the right to undertake site visit to current/previous clients that use/used their existing proposed Solution for Portfolio-Project Management System. It is expected from the bidders to inform their user clients of potential site visit.
- vi. The appointed Services Provider will enter into a Services Level Agreement (SLA) with the employer (IDT)
- vii. The terms of the contract that will be signed between the parties have been stipulated under **SECTION "Service Level Agreement"**.
- viii. All contractual relationships must ensure that the programme / project data is owned by the IDT unless ownership is transferred to the Client through the relevant legislative requirements applicable.

### 3. IDT PORTFOLIO PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS)

#### 3.1 Project Overview

Driven by the IDT Vision of being “A leading public sector developmental programme implementation management agency”, continuous improvement to institute best programme and project management practices in supporting various client’s department in the delivery of social and basic services infrastructure and related development objectives, is imperative to achieve efficiency to meet the client demands. The IDT initiated processes in the improvement and integration of portfolio, programme and project delivery management systems and processes governed by the Built Environment and the Public Sector Standards and Practices.

The objective of the project is to acquire An (Artificial Intelligence) AI-Ready Portfolio Project Application and configuration and customization to the IDT Programme/Project Management System requirements. The application should include workflows in line with the IDT programme and project management processes as well as automation, and it should be able to shorten the IDT’s project delivery periods by eliminating inefficiencies and creating a robust electronic “audit-trail”. The configured Solution must be aligned with the Public Sector IDMS and FIPDM Standards and Processes. The scope of the project includes commissioning / implementation of the system and a minimum of three (3) years maintenance and support as part of the proposal., standards and guidelines, to ensure compliances with the National Treasury requirements.

#### 3.2 Objectives of the Project

The aim of the project is to procure the services of a professional Solution consultant company to provide IDT with licenses and configuration of the Portfolio Project application to ensure management and delivery of integrated quality social infrastructure programmes and projects on behalf of government.

The implementation of the project is to ensure Programme and Project Management best practice by applying the 10 knowledge areas of the Project Management Body of Knowledge (PMBOK) and the Built Environment Professionals governance, while complying with National Treasury Regulations guideline and standards such as the FIPDM and the IDMS Management Framework

for the implementation of infrastructure projects in South Africa Public Sector which in fact, is aligned with the CIDB Gateway System.

The second objective of the project is to implement modern technologies such as Artificial Intelligence (AI) in the Programme and Project Management Environment within IDT. This will enhance efficiency and assist the organisation to deliver programme and projects on time, within budget and good quality.

### **3.3 Scope of the Project**

The scope of the project is to acquire Portfolio Project Management AI Solution and application that can be customised to the IDT project management environment. The system should include automated workflows in line with IDT programme and project management processes as well as automation of process templates and checklists. It should be able to shorten the IDT's project delivery periods by eliminating inefficiencies and creating a robust electronic "paper-trail" that will stand as acceptable evidence to the scrutiny of an audit.

The system should be user friendly and allow for automatic capturing of information by all the relevant stakeholders at project level during execution, avoiding the need for a duplication of processes in the collection and capture of information. This can be delivered through Form-based information processing to capture and report data on project sites, whereby IDT project consultants / Professional Service Providers will capture the data in the form based and then the data gets reviewed and approved internally by programme implementation managers and programme managers respectively through a predefined process.

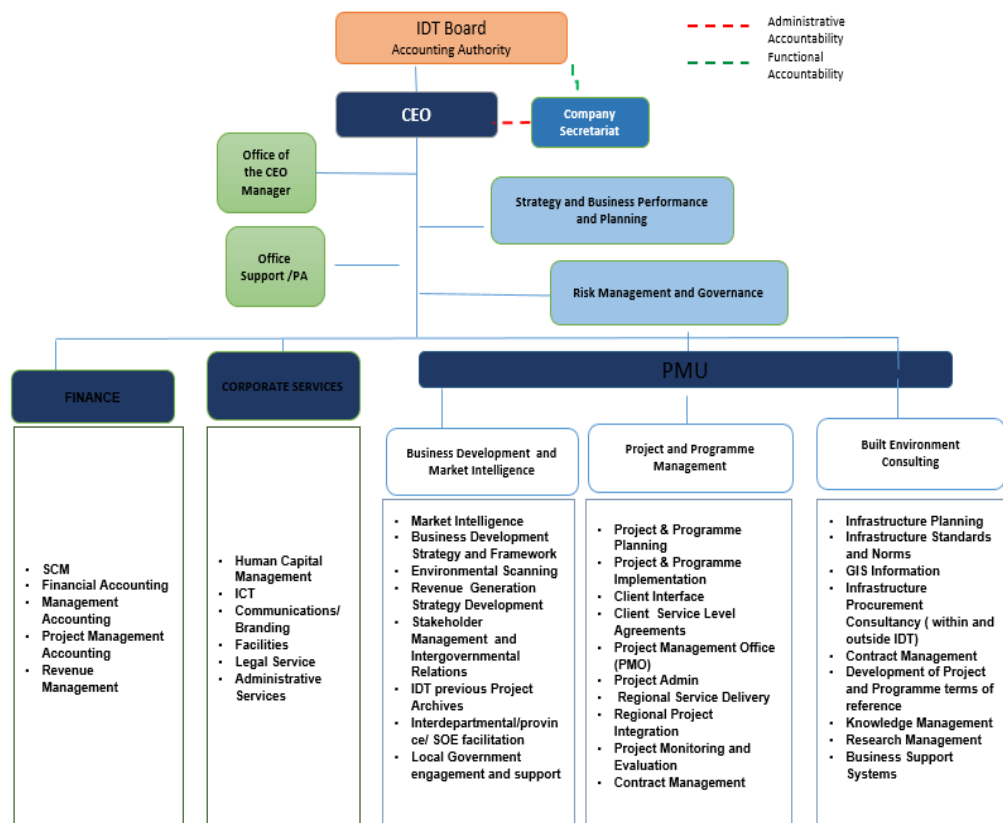
## 4. OVERVIEW OF IDT

### 4.1 Who is IDT ?

The IDT is a Schedule 2 Major Public Entity in terms of the PFMA. Reports to Parliament through its Executive Authority, the Minister of Public Works and Infrastructure. Mandated to act as a state implementing agency focusing on social infrastructure programme and project management. Works with all spheres of government through client-specific service level agreements.

### 4.2 Organisational Structure

The high-level enterprise-wide governance structure of the IDT is represented by the organogram in Figure 4.1. The Programme Management Services Unit (PMSU) is the IDT’s arm through which the bulk of the programmes are implemented on behalf of the clients. The PMSU is the “custodian of a substantial part of the IDT’s core business”. The Programme and Project Management System is required by the PMSU.



### 4.3 Governance Structure

The IDT enjoys a National footprint though out the country in its nine regions (Provinces). With one regional office in each of the nine provinces major cities. The System will be used to:

- a) Support the IDT programme and programme personnel in the execution of their work,
- b) Collect the information that is required to report and support management and stakeholder requirements.

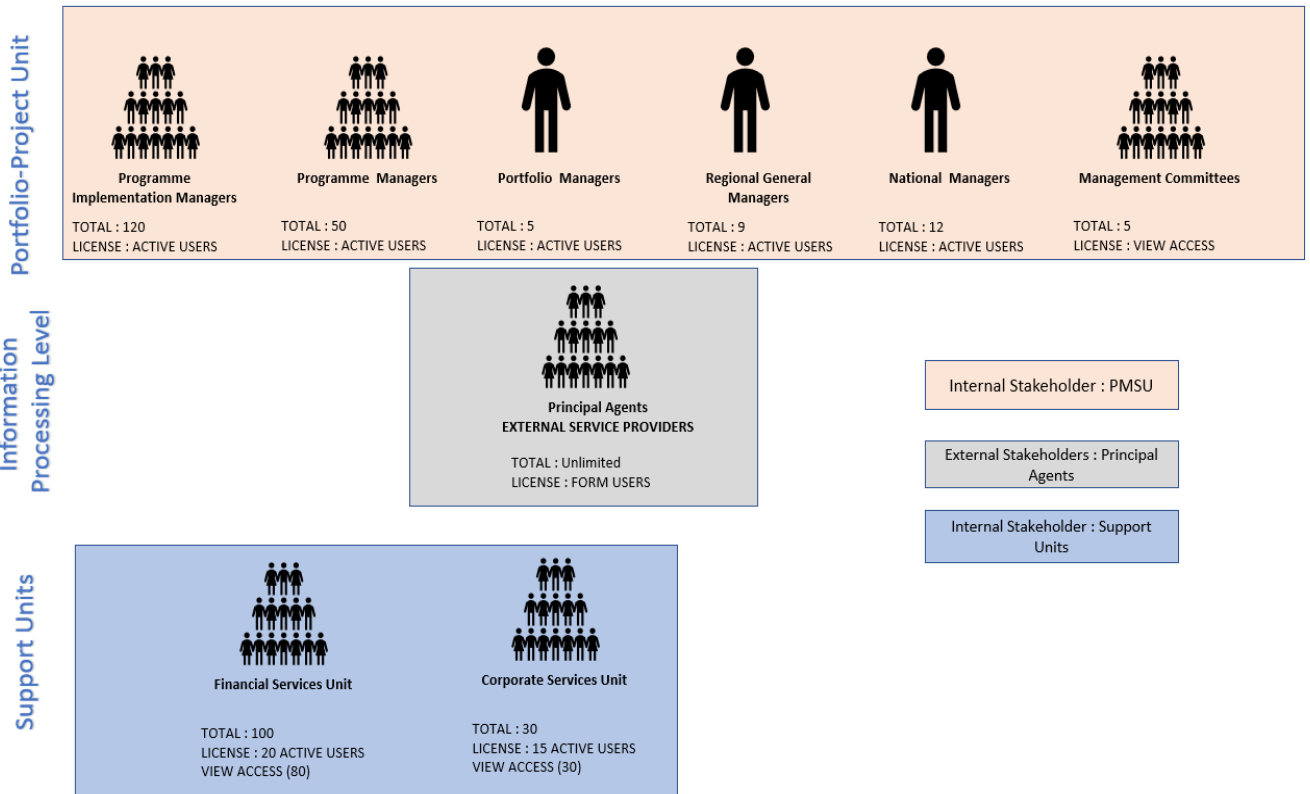
### 4.4 Portfolio Project System Stakeholders



<b>INTERNAL</b>	<b>PMSU</b>	<b>All PMSU Personnel</b>
	<b>FSU</b>	Supply Chain Management
		Project Accounting
		Financial Management
	<b>CSU</b>	Legal Services
		ICT
		Human Resource
Internal Audit		

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

	<b>MANAGEMENT</b>	Board / Board Committees / CEO
<b>EXTERNAL</b>	<b>EXTERNAL SERVICE PROVIDERS</b>	Contractors
		Project Managers
		Professional Service Providers (e.g., Principal Agents, Architecture, Engineers, Qs etc.)
		Service Providers
	<b>LEGISLATIVE BODIES</b>	SA Parliament and Relevant Parliament Committees
		Department of Public Works and Infrastructure
		National Treasury
		Auditor-General
		Client Departments
		Municipalities
	<b>PUBLIC</b>	Any interested citizen within the republic



**4.5 User Roles**



**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

These are people that will utilise the e-PPMIS to deliver the relevant programmes and projects, and table below provides a list of the potential users.

<b>User Role</b>	<b>Role Description</b>	<b>Reports to</b>	<b>User Access Requirement</b>
<b>Executives / CEO / CFO</b>	Overall IDT management.	IDT Board	Viewer
<b>Executive Manager: PMSU</b>	Overall management of IDT's regional operations.	Executive	Viewer / Collaboration
<b>General Manager: PMSU</b>	Coordinate's portfolios and ensures delivery on national programmes.	Executive	Viewer / Collaboration
<b>Regional General Manager</b>	Manages the IDT's regional office ensures delivery on regional programmes or a regional portion of a national programme.	General Manager: Regional Operations	Viewer / Collaboration
<b>Portfolio Manager</b>	Manages one or more portfolios (group of programmes) for the Clients. Can be at Head Office (national) or regional level.	General Manager: Programmes or Regional General Manager	Active User / Collaboration
<b>Originators</b>	Assess proposed programmes and prepare documentation before the IDT is appointed for a programme.	Varies.	Active User / Collaboration
<b>National Programme Manager</b>	Manages one or more national programmes for the IDT.	Portfolio Manager	Active User / Collaboration
<b>Regional Programme Manager</b>	Manages one or more programmes in a region for the IDT <u>or</u> manages a regional portion of a national programme.	Regional General Manager / Portfolio Manager	Active User / Collaboration
<b>Programme Implementation</b>	Manage infrastructure programmes and project planning, implementation, and delivery.	Regional Programme Manager	

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

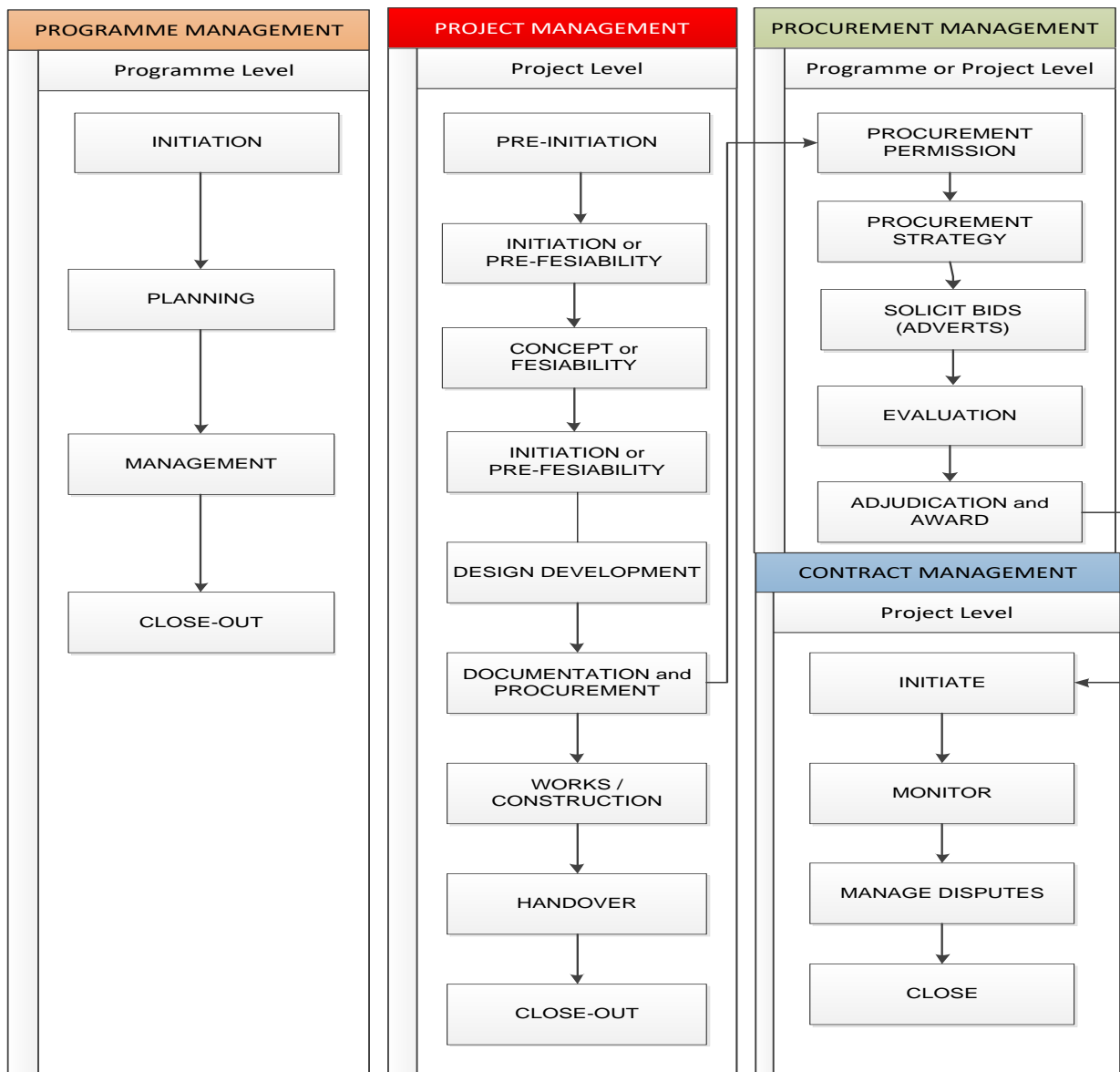
<b>Manager – Technical</b>			Active User / Collaboration / Form User
<b>Programme Implementation Manager – Social</b>	Manage social development and community upliftment programmes, implementation, and delivery.	Regional Programme Manager	Active User / Collaboration / Form User
<b>Programme Implementation Administrator</b>	Provide administration support and co-ordinate the activities of the Programme Implementation Managers and to monitor the programme budget and other administrative related activities aligned to programme and projects	Regional Programme Manager	Active User / Collaboration / Form User
<b>Information Management Officer</b>	Provide Information Management in Regional Offices	Regional General Manager	Active User / Collaboration / Form User
<b>Support Units</b>	All identified personnel in the all the support units linked to the programme and project management workflows (FSU, CSU, OCEO)	Relevant Executives in the Units	Viewer / Collaboration
<b>Principal Consultant</b>	The professional appointed by the IDT assigned responsibility for leading the professional team during the design stage.	Programme Implementation Manager	Site Information Data Collection / Form User
<b>Consultant / Supplier</b>	The party appointed by the IDT to provide a specific service such as infrastructure design or social service planning.	Programme Implementation Manager or Principal Consultant / Agent	Viewer
<b>Principal Agent</b>	The professional appointed by the IDT assigned responsibility for leading the professional team during the construction	Programme Implementation Manager	

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

	stage and administering the construction contract (usually an architect).		Site Information Data Collection / Form User
<b>Contractor</b>	The party appointed by the IDT to provide a specific service such as infrastructure construction or social service provision.	Programme Implementation Manager or Principal Agent	Viewer
<b>External Stakeholders</b>	All external stakeholders will have view access to the progress and updates of programmes and projects implemented as well as send enquiries where applicable	N/a	Viewer

## 5. OVERVIEW OF IDT PROGRAMME AND PROJECT MANAGEMENT PROCESSES

The IDT’s high-level Programme and Project Management process (Level 1) is presented below. The IDT had broken down (decomposed) each of these processes/stages to give additional detail with respect to the sub-processes and activities as well as the flow of information and roles and responsibilities. Each stage objective should be captured in the e-PPMIS and corresponding template to be developed, inclusive of the workflow approval process.



**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

<b>Level</b>	<b>Stage Name</b>	<b>Stage / Gate No.</b>	<b>Stage Objective (to be automated in Workflows, Forms, Documents, and other input data processes)</b>
<b>PROGRAMME MANAGEMENT LEVEL</b>	<b>Client Approved IAMP</b>	PF-S1	Upload clients approved Infrastructure Asst Management Plan
	<b>Client Programme Management Documents</b>	PR-S1	Upload or capture the following documents / information <ul style="list-style-type: none"> <li>• Procurement Strategy</li> <li>• Programme Management Plan</li> <li>• Programme Charter</li> </ul>
	<b>Programme Initiation</b>	PR-S1-A PR-S1-B	Upload or capture the following documents <ul style="list-style-type: none"> <li>• Approved New Business Form</li> <li>• Instruction Letter from client</li> <li>• IDT Programme Charter</li> <li>• Signed -off Service Level Agreement (SDA)</li> </ul>
	<b>Programme Planning</b>	PR-S2 PR-CP-2	Upload or capture the following documents / information <ul style="list-style-type: none"> <li>• Approved Programme Implementation Plan (IPI)</li> <li>• Programme Schedule</li> <li>• Programme Cashflow</li> <li>• Programme Bank Account</li> <li>• Programme GP (Great Plains) Registration</li> </ul>
	<b>Programme Management</b>	PR-S3	Upload or capture the following documents / information <ul style="list-style-type: none"> <li>• Programme Progress Reports</li> <li>• Programme Financial Reconciliations</li> <li>• Updated Programme Cashflow</li> <li>• Updated Programme Schedule</li> <li>• Updated Programme Risk</li> <li>• Manage Contractual Matters</li> </ul>
	<b>Programme Close-out</b>	PR-S4	Upload or capture the following documents / information <ul style="list-style-type: none"> <li>• Programme Close-out Reports</li> <li>• Updated Programme Financial Reconciliations</li> <li>• Bank Account closure confirmation</li> <li>• Programme Handover Checklist</li> <li>• Client acknowledgement of Programme Handover Documents</li> </ul>
	<b>Project Pre-Initiation</b>	PJ-0	Upload or capture the following documents / information

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

<b>Level</b>	<b>Stage Name</b>	<b>Stage / Gate No.</b>	<b>Stage Objective (to be automated in Workflows, Forms, Documents, and other input data processes)</b>
<b>PROJECT MANAGEMENT LEVEL</b>			<ul style="list-style-type: none"> <li>• Client Instruction confirming Project Budget Allocation per Financial Year</li> <li>• Letter of Appointment – IDT Project Manager</li> <li>• Site Clearance Certificate (if applicable)</li> <li>• Project Charter</li> </ul>
	<b>Project Initiation (Pre-Feasibility)</b>	PJ-S1-A PJ-S1-B PJ-S1-C PJ-CP-1	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Approved Project Initiation Report</li> <li>• Approved Project Pre-Feasibility Report (mega projects)</li> <li>• Updated Project Charter Project Charter</li> <li>• Approved Project Execution Plan (PEP)</li> </ul>
	<b>Project Concept (Feasibility)</b>	PJ-S2-A PJ-S2-B PJ-CP-B	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Develop Project Concept Report</li> <li>• Develop Project Feasibility Report (mega projects)</li> <li>• Approved Feasibility Report (mega projects)</li> </ul>
	<b>Project Design Development</b>	PJ-S3-A PJ-CP3-A PJ-CP3-B PJ-CP3-C	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Drawing Checklist per Project Discipline</li> <li>• Approved Drawing sign-off</li> <li>• Minutes and Attendance Registers for Design Meetings</li> <li>• Municipal Drawing approval</li> <li>• DPWI Drawings Approval</li> <li>• Client Acceptance Drawings</li> </ul>
	<b>Project Documentation and Procurement</b>	PJ-S4-1 PJ-CP4-A	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Construction and Procurement Documentation (Specifications)</li> <li>• Project Health and Safety Requirement</li> <li>• Construction Schedule – Preliminary</li> <li>• Construction Costs and Projections- - Preliminary</li> <li>• Client Approval for Project Documentation</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

Level	Stage Name	Stage / Gate No.	Stage Objective (to be automated in Workflows, Forms, Documents, and other input data processes)
			<ul style="list-style-type: none"> <li>• Submit Construction Approval by Dept. of Labour</li> <li>• Approved Construction Permit</li> </ul>
	<b>Project Works / Construction</b>	PJ-S5	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Site Handover Certificate</li> <li>• Minutes and Attendance Register of site handover certificates</li> <li>• Contractor Health and Safety Plan – approved by H&amp;S Consultant</li> <li>• Subcontractor List</li> <li>• Construction Issue Log</li> <li>• Updated Construction Schedule</li> <li>• Updated Construction Cashflow and Projections</li> <li>• Construction Environmental Management Plan</li> <li>• Progress Reports</li> <li>• Socio-Economic / Empowerment Report</li> <li>• Monthly site-meetings (attendance registers and minutes)</li> <li>• Monthly Technical meetings (attendance registers and minutes)</li> <li>• Interim Payments Reports</li> <li>• Professional Service Provider Payment Report</li> <li>• Manage Change Request (VO / EOT / SCOPE)</li> <li>• Site Inspection Reports</li> <li>• Health and Safety Audit Inspection Report</li> <li>• Professional site inspection monitoring report</li> <li>• Facility Users Training Plan</li> <li>• Training Attendance Registers</li> <li>• Issuing of Practical Completion Certificate</li> <li>• Issuing of Works Completion Certificate</li> <li>• Handover of Facility Keys</li> </ul>
	<b>Project Handover</b>	PJ-S6 PJ-CP6	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Municipality Occupation Certificate</li> <li>• As Built Drawings</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

Level	Stage Name	Stage / Gate No.	Stage Objective (to be automated in Workflows, Forms, Documents, and other input data processes)
			<ul style="list-style-type: none"> <li>• Building Certificates</li> <li>• Asset Register Data</li> <li>• Equipment Maintenance Plan</li> <li>• M &amp; O Manuals</li> <li>• Handover Documentation Checklist</li> <li>• Acknowledgement of Handover documentation report</li> </ul>
	<b>Project Close-out</b>	PJ-S1-A PJ-S1-B PJ-CP1-A PJ-CP1-B PJ-CP1-C	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Project Final Completion List (indicating defects)</li> <li>• Final Completion Report</li> <li>• Latent Defects Report</li> <li>• Project Close-out Report</li> <li>• Final Completion Certificate</li> <li>• Contractor Final Account</li> <li>• Contractor Final Payment Certificate</li> <li>• PSP Final Account</li> <li>• PSP Final Payment Certificate</li> <li>• Approved Close-out Report</li> <li>• Confirmation – closure of projects in IDT Systems</li> </ul>
<b>PROCUREMENT MANAGEMENT LEVEL</b>	<b>Procurement Permission</b>	PG-S1 PG-S2 PG-S3 PG-S4	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Scope pf work for procurement</li> <li>• Procurement Financial Value</li> <li>• Budget Confirmation</li> <li>• Procurement Approval</li> <li>• Procurement Strategy and Permission</li> <li>• Pricing Strategy</li> <li>• Procurement Procedure</li> <li>• Bid Specification Documentation (minutes / attendance registers/ appointments etc)</li> <li>• Cashflow based on anticipated Contractual Obligation</li> <li>• Control Measures for Payments</li> <li>• Procurement Strategy and Permission Approval</li> </ul>



**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

<b>Level</b>	<b>Stage Name</b>	<b>Stage / Gate No.</b>	<b>Stage Objective (to be automated in Workflows, Forms, Documents, and other input data processes)</b>
	<b>Solicit Tenders</b>	PG-S5	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Invitation to Tenders</li> <li>• Receive of Tenders</li> <li>• Closure of Tenders</li> <li>• Records of Tender Offers</li> </ul>
	<b>Bid Evaluation</b>	PG-S6	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Records of all tenders received</li> <li>• Tender Evaluation Report</li> <li>• Risk Analysis Report</li> <li>• Records of Tender Offers</li> </ul>
	<b>Bid Adjudication</b>	PJ-S7	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Tender Adjudication Report</li> <li>• Notification – Successful and Unsuccessful Tenders</li> <li>• Request for Additional Budget (if winning bidder price is above estimated budget)</li> <li>• Records of Tender Offers</li> <li>• Contract Award Data</li> <li>• Notification to Legal Issued</li> </ul>
<b>CONTRACT MANAGEMENT LEVEL</b>	<b>Contract Initiation (Documentation)</b>	CM-S1	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Contract Documentation</li> <li>• Letter of Appointment</li> </ul>
	<b>Contract Management</b>	CM-S2	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Fully signed Contract</li> <li>• Variation Order and Extension of Time Reports</li> <li>• Contract Commitment Report</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

Level	Stage Name	Stage / Gate No.	Stage Objective (to be automated in Workflows, Forms, Documents, and other input data processes)
			<ul style="list-style-type: none"> <li>• Supplier Performance Report</li> <li>• Contract Adjustments</li> </ul>
	<b>Contract Closure</b>	CM-S3	Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> <li>• Updated Contract Commitment Report</li> <li>• Updated Supplier Performance Report</li> <li>• Updated Variation Order and Extension of Time Reports</li> <li>• Contract Close-out Checklist</li> </ul>

As indicated above, the Programme and Project Management process include a process mapping linked to specific role players including internal and external stakeholders. In addition, activities, stages, and processes are linked to deliverables that is supported either by a check list, a template or specific document to be electronically enable inclusive of automated workflows.

The system must have an integration capability across applications with the following minimum requirements for each programme and project stages

- Mobile App Technology (both Android and IOS)
- Encryption Technology
- Automated Process Workflows
- Templates and Forms

## 6. KEY FUNCTIONAL REQUIREMENTS

The proposed Solution is expected to meet the minimum requirements outlined in the table below. Bidders are encouraged to propose a solution that not only meets the minimum functional requirements, but also go beyond to offer innovative solutions in the market such as Artificial Intelligence, Mobile Friendly, Location identifier, Integration Capabilities etc.



**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

<b>APPLICATION</b>	<b>MINIMUM REQUIREMENTS</b>
<p><b>1. Programme and Project Management</b></p>	<p>The programme and project management application should have the following minimum functionality.</p> <ul style="list-style-type: none"> <li>• Programme and Project Management solution aligned to IDMS and FIPDM</li> <li>• Customised to IDT Programme and Project Management workflows outlined above</li> <li>• Application of the PIMBOK 10 Knowledge Areas</li> <li>• Automated workflows for the IDT programme and Project Management with stage gate and checklist approval by relevant delegated officials (process outline above briefly)</li> <li>• Notification Alerts for Activities</li> <li>• Programme and Project Performance with early warning capability</li> <li>• Project Site Reporting, including site meetings, technical meetings, Issues, Actions and Risks tracking</li> <li>• Project Team collaboration</li> <li>• Updating of Project Status</li> <li>• Developing Programme and Project Cashflow</li> <li>• Capturing of Programme and Project Budget Allocations</li> <li>• Integrate with Microsoft Great Plains Dynamics for Expenditure Tracking</li> <li>• Purchase Order Tracking and Adjustment Tracking</li> </ul>
<p><b>2. GIS (Spatial Management)</b></p>	<p>The GIS application should have the following minimum functionality and based on ESRI suite of software applications.</p> <ul style="list-style-type: none"> <li>• Capturing of Project Data on site</li> <li>• Built-in forms for data capturing (to be designed)</li> <li>• Mapping of Programmes and Projects across the country</li> <li>• Update of Project Status</li> <li>• Capturing of Project Images</li> <li>• Viewing Programme and Project Performance</li> <li>• Interactive Application for viewing and querying of Programme and Project Data</li> <li>• Map view of Programme and Projects</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

APPLICATION	MINIMUM REQUIREMENTS
	<ul style="list-style-type: none"> <li>• Mobile responsive with all available native mobile features such as Location / Tracking services, QR Codes and Camera</li> <li>• Dashboard application to interface with External Dashboards</li> <li>• The application should have a Form Engine functionality with capability to generate front-end and no code for data capturing purposes</li> <li>• The Form Engine should also consist of a Workflow defined as per the Programme and Project Management Processes</li> </ul>
<b>3. Dashboards</b>	<ul style="list-style-type: none"> <li>• The Dashboard application should have the following minimum functionality.               <ul style="list-style-type: none"> <li>○ Custom based dashboard</li> <li>○ User based dashboards</li> <li>○ External Dashboards for clients and Public</li> </ul> </li> </ul>
<b>4.1 Internal</b>	<ul style="list-style-type: none"> <li>• Dashboard view for Programme and Project Performance (Cost and Time performance)</li> <li>• Risks, Issues and Action Items Tracking</li> <li>• Flagging of non-performing projects and programmes</li> <li>• Programme and Project Life Cycle view</li> <li>• Programme and Project Status</li> <li>• Early Warnings</li> <li>• Social Programmes Dashboards</li> <li>• Procurement Dashboards</li> </ul>
<b>4.2 External</b>	<ul style="list-style-type: none"> <li>• Viewing application for client departments</li> <li>• Viewing Programme and Project Performance</li> <li>• Programme and Project Status</li> <li>• GIS Dashboard Integration</li> </ul>
<b>4. Mobile Application Development</b>	<p>The Mobile application should have the following minimum functionality.</p> <ul style="list-style-type: none"> <li>• Use of customised mobile Application to access and capture certain features</li> <li>• Capturing site information to be identified within the IDT programme and project management processes</li> <li>• Collaboration between IDT and Principal Agents with Notifications</li> <li>• The application should have a Form Engine functionality with capability to generate front-end and no code for data capturing purposes</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

APPLICATION	MINIMUM REQUIREMENTS
	<ul style="list-style-type: none"> <li>The Form Engine should also consist of a Workflow defined as per the Programme and Project Management Processes</li> </ul>
<b>5. Automated Workflows</b>	<p>The Automated Workflow should have the following minimum functionality.</p> <ul style="list-style-type: none"> <li>Automated workflow capability to be applied in all the information being processed</li> <li>Escalation Capability for unfinished, due, overdue, or neglected tasks</li> <li>Collaboration amongst project and programme internal personnel, including Principal Agents responsible for programmes and projects</li> </ul>
<b>6. Electronic Signatures</b>	<p>Minimum Two-phase Authentication for application of signatures to documents (OTP)</p> <ul style="list-style-type: none"> <li>Cryptographic Digital Signature</li> <li>Parallel, sequential, and mixed routing</li> <li>Approvers, Viewers and Signers</li> <li>API integration</li> <li>Digital Certificates</li> <li>Time Stamping</li> <li>Tamper Evident</li> </ul>
<b>7. Documentation and Records Management</b>	<p>The Documents and Records application should have the following minimum functionality.</p> <ul style="list-style-type: none"> <li>Electronic Document and Records Management to be applied in all application</li> <li>Viewing and Retrieval of Documentation</li> <li>Electronic Referencing of Documents</li> <li>The documentation engine needs to consist of a template-driven administration functionality.</li> <li>The documentation/template should consist of automation to ensure management all document content and processes.</li> <li>Should comprise of a communication and event driven engine</li> <li>The documentation engine should also be fully integrated with an authorised digital signature capability with workflow to allow approvers, viewers, and signers</li> </ul>
<b>8. Electronic Form Builder</b>	<p>The Form Builder application should have the following minimum functionality.</p> <ul style="list-style-type: none"> <li>Electronic Form Development with Automated Workflows for information captured to be reviewed by PIMs and approved by PMs. Unapproved or rejected information to be automatically rerouted to the originator</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

APPLICATION	MINIMUM REQUIREMENTS
	<ul style="list-style-type: none"> <li>• Database Development based on multiple forms</li> <li>• Design, Edit, Capture Functionality</li> <li>• Mobile Forms</li> </ul>
<b>9. Reports</b>	<p>The Reports should have the following minimum functionality.</p> <ul style="list-style-type: none"> <li>○ Custom based Reports</li> <li>○ User based Reports</li> <li>○ External Reports for clients and Public</li> </ul>
<b>17.1 Internal</b>	<ul style="list-style-type: none"> <li>• Standard Reports (Projects, Programmes, Portfolio, Clients, Region and Unit Levels)</li> <li>• PMSU Report (structure to be provided)</li> <li>• Custom Report Builder</li> </ul>
<b>17.2 External</b>	<ul style="list-style-type: none"> <li>• Standard Client Reports</li> <li>• Custom Report Builder</li> </ul>
<b>10. Integration Requirements</b>	<p>The fully implemented Solution must be able to integrate with the following systems and applications within the organisation.</p> <ul style="list-style-type: none"> <li>• <b>MICROSOFT DYNAMICA GREAT PLAINS</b> (used for Project and Programme Registration as well as Financial Transactions for programmes and projects)</li> <li>• <b>SHAREPOINT ONLINE</b> (Publishing of reports and update on other business requirements implemented through SharePoint Online)</li> </ul>
<b>11. AI-Ready Functionality</b>	<p>The programme and project management application should have the following minimum future capability.</p> <ul style="list-style-type: none"> <li>• Performing complex tasks that historically only people within the organisation were able to perform such as making decisions or solving problem</li> <li>• Machine learning and predict the implementation of lifecycle of the projects</li> <li>• Better Monitoring of Projects by anticipating potential problems in the projects</li> <li>• Gather data and use Machine Learning to assist with selecting the best project management method for each project</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

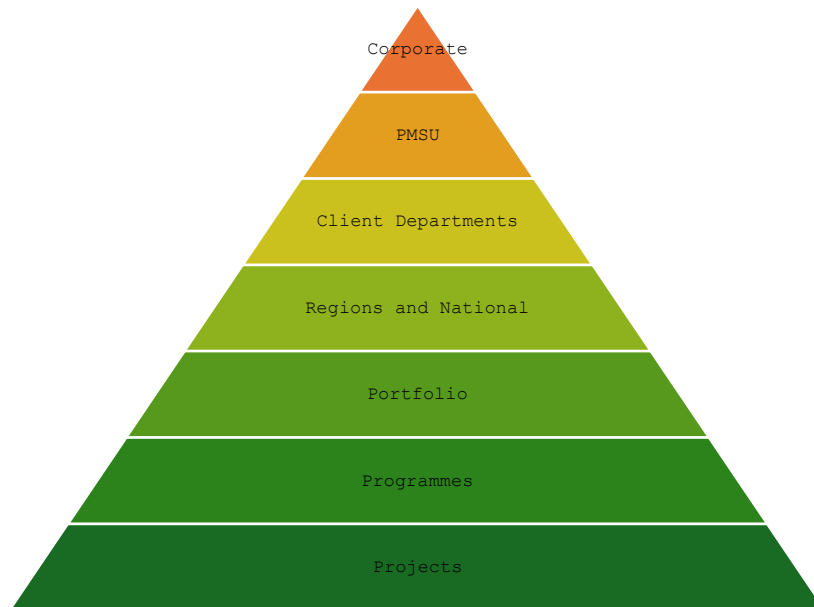
<b>APPLICATION</b>	<b>MINIMUM REQUIREMENTS</b>
	<ul style="list-style-type: none"> <li>• Improve Project and Programme Planning and Reporting</li> <li>• Facilitate Project Scheduling process and draft of details plans and Resource Demands</li> <li>• Automation via Virtual Assistants of support functions such as Status Update, Risk Assessment, Project Budget and Expenditure Trends and Stakeholder Analysis</li> <li>• Automated Reporting with Real-Time Data</li> </ul>
<b>12. System User Manual</b>	<p>The programme and project management application should have the following minimum Functionality.</p> <ul style="list-style-type: none"> <li>• Embedded Static Manuals for Training</li> <li>• Video Manual for Training and On-boarding of new team members with Virtual Assistance</li> </ul>
<b>13. QR Code Integration</b>	<p>The system should have a functionality to output QR Code for all the system generated documents and printable forms, with the code scanned indicating the following minimum information about the document</p> <ul style="list-style-type: none"> <li>• Date of Document Initiative</li> <li>• Originator of the Document</li> <li>• Approver of the Document</li> <li>• Date of Approval</li> <li>• Document Details</li> <li>• Any other information that the client will determine during implementation</li> </ul>



## 7. IDT INFORMATION AND DATA FLOW

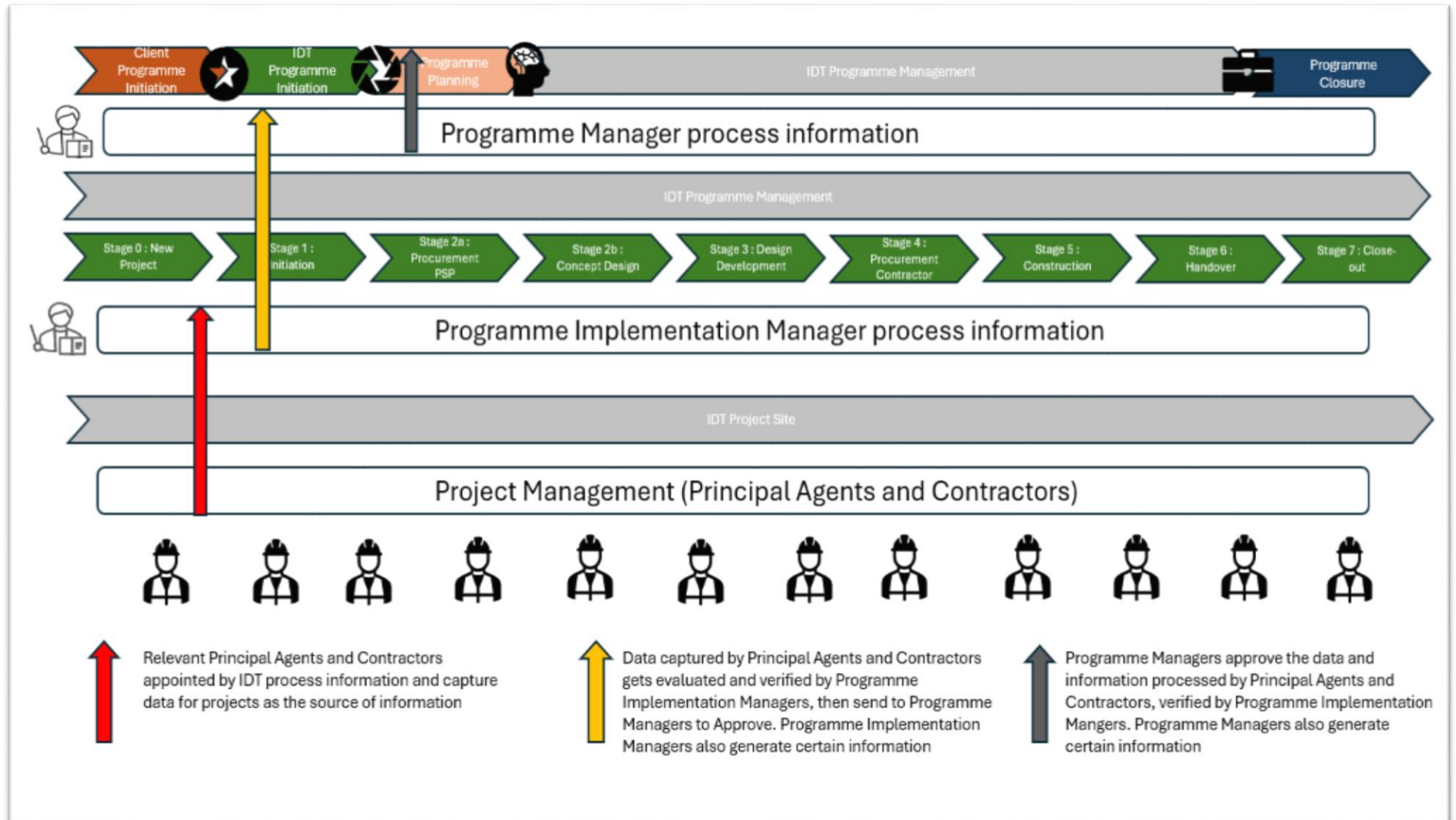
IDT has developed a Standard Operating Procedure for Programme and Project Management within the organisation. Activities within programmes and projects are outlined in the SOP with maximum number of days. This should be used to trigger notification for outstanding tasks. In addition, the document below outlines the minimum number of supporting documents for each and every stage gate (**Annexure A**)

The reporting structure of e-PPMIS is outlined in the figure below with the lowest source of information to the highest level of decision making in the organisation.

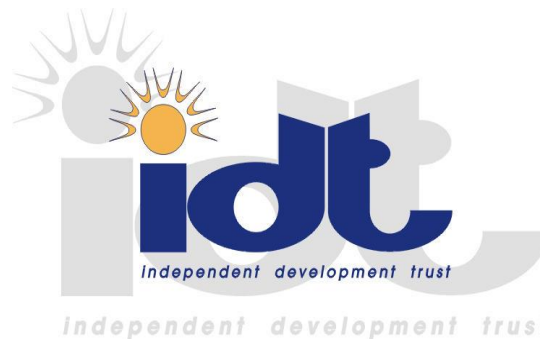


LEVEL	NUMBERS	SOURCE
<b>Projects</b>	Unit is managing +- 2 000 projects on average in a financial year	<ul style="list-style-type: none"> <li>Principal Agents</li> <li>PIMs</li> </ul>
<b>Programmes</b>	On average +- 200 Programmes	<ul style="list-style-type: none"> <li>PIMs</li> <li>PMS</li> </ul>
<b>Portfolio / Clients</b>	On average 15-30 Portfolios	<ul style="list-style-type: none"> <li>PIMs</li> <li>PMS</li> </ul>
<b>Region</b>	9 Regions and 1 National Office	<ul style="list-style-type: none"> <li>PMS</li> <li>Portfolio Managers</li> <li>Regional General Managers</li> </ul>
<b>PMSU</b>	One Unit (Combination of 9 regions and head office programmes unit)	<ul style="list-style-type: none"> <li>Regional General Managers</li> <li>GM PMSU</li> <li>Executive PMSU</li> </ul>
<b>Corporate</b>	Entire IDT	<ul style="list-style-type: none"> <li>ALL Levels</li> <li>CFO</li> <li>CEO</li> </ul>

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**



## 8. GENERAL CONDITIONS OF CONTRACTS



## INDEPENDENT DEVELOPMENT TRUST

---

## STANDARD CONDITIONS OF TENDER

---

## General

### Actions

1. The Independent Development Trust, Independent Development Trust's Representative and each bidder submitting a tender shall act as stated in these Conditions of Tender and in a manner, which is fair, equitable, transparent, competitive, and cost-effective.

The Conditions of Tender and the Tender Data shall not form part of any contract arising from this invitation to tender.

### Communication

2. Each communication between the Independent Development Trust and a bidder shall be to or from Independent Development Trust's Representative only, and in a form that can be read, copied, and recorded. Communication shall be in the English language. The Independent Development Trust takes no responsibility for non-receipt of communications from or by a bidder.

### Independent Development Trust's rights to accept or reject any tender

3. The Independent Development Trust may accept or reject any variation, deviation, tender, or alternative tender, and may cancel the tender process and reject all tenders at any time prior to the formation of a contract. The Independent Development Trust or Independent Development Trust's Representative will not accept or incur any liability to a bidder for such cancellation and rejection but will give reasons for the action. The Independent Development Trust reserves the right to accept the whole of any part of any tender.
4. After the cancellation of the tender process or the rejection of all tenders the Independent Development Trust may abandon the proposed work and services, have it performed in any other manner, or re-issue a similar invitation to tender at any time.

## 2 Bidder's obligations

The bidder shall comply with the following obligations when submitting a tender and shall:

- |   |   |  |
|---|---|--|
| <b>Eligibility</b>  | 1 | Submit a tender only if the bidder complies with the criteria stated in the Evaluation Criteria.   |
| <b>Cost of tendering</b>                                  | 2 | Accept that the Independent Development Trust will not compensate the bidder for any costs incurred in the preparation and submission of a tender.   |
| <b>Check documents</b>                                    | 3 | Check the tender documents on receipt, including pages within them, and notify the Independent Development Trust's Representative of any discrepancy or omissions.   |
| <b>Copyright of documents</b>                             | 4 | Use and copy the documents provided by the Independent Development Trust only for the purpose of preparing and submitting a tender in response to this invitation.   |
| <b>Standardised specifications and other publications</b> | 5 | Obtain, as necessary for submitting a tender, copies of the latest revision of standardised specifications and other publications, which are not attached but which are incorporated into the tender documents by reference.                       |
| <b>Acknowledge receipt</b>                                | 6 | Preferably complete the Receipt of invitation to submit a tender form attached to the Invitation and return it within five days of receipt of the invitation.  |
|   | 7 | Acknowledge receipt of Addenda to the tender documents, which Independent Development Trust's Representative may issue, and if necessary, apply for an extension to the deadline for tender submission, in order to take the Addenda into account. |
| <b>Site visit and / or clarification meeting</b>          | 8 | Attend a site visit and/or clarification meeting at which bidders may familiarise themselves with the proposed work, services or supply, location, etc. Details of the meeting are stated in the Tender Advert.                                    |

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

- Seek clarification** 9 Request clarification of the tender documents, if necessary, by notifying Independent Development Trust's Representative earlier than the closing time for clarification of queries.
- Pricing the tender** 10 Include in the rates, prices, and the tendered total of the prices (if any) all duties, taxes (except VAT), and other levies payable by the successful bidder. Such duties, taxes and levies are those applicable 14 days prior to the deadline for tender submission.
- 11 Show Value Added Tax (VAT) payable by Independent Development Trust separately as an addition to the tendered total of the prices.
- 12 Provide rates and prices that are fixed for the duration of the contract and not subject to adjustment except as provided for in the conditions of contract.
- 13 State the rates and Prices in South African Rand unless instructed otherwise as an additional condition in the Tender Data. The selected conditions of contract may provide for part payment in other currencies.
- Alterations to documents** 14 Cannot make any alterations or additions to the tender documents, except to comply with instructions issued by the Independent Development Trust's Representative or if necessary, to correct errors made by the bidder. All such alterations shall be initialled by all signatories to the tender. Corrections may not be made using correction fluid, correction tape or the like.
- Alternative tenders** 15 Submit alternative tenders only if a main tender, strictly in accordance with all the requirements of the tender documents is also submitted. The alternative tender is submitted with the main tender together with a schedule that compares the requirements of the tender documents with the alternative requirements the bidder proposes.
- 16 Accept that an alternative tender may be based only on the criteria stated in the Tender Data and as acceptable to Independent Development Trust.

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

**Submitting a tender**

- 17 Submit a tender for providing the whole of the works, services or supply identified in the Terms of Reference unless stated otherwise as an additional condition.
- 19 Submit the tender as an original plus and provide an English translation for documentation submitted in a language other than English. Tenders may not be written in pencil but must be completed in ink.
- 20 Sign the original and all copies of the tender where indicated. Independent Development Trust will hold the signatory duly authorised and liable on behalf of the bidder.
- 21 Accept that Independent Development Trust will not assume any responsibility for the misplacement or premature opening of the tender if the outer package is not sealed and marked as stated.

**Note:**

Independent Development Trust prefers not to receive tenders by post and takes no responsibility for delays in the postal system or in transit within or between Independent Development Trust offices.

Where tenders are sent per fax, Independent Development Trust takes no responsibility for difficulties in transmission caused by line or equipment faults.

Where tenders are sent via courier, Independent Development Trust takes no responsibility for tenders delivered to any other site than the tender office.

Independent Development Trust employees are not permitted to deposit a tender into the Independent Development Trust tender box on behalf of a bidder.

**Closing time**

- 22 Ensure that Independent Development Trust has received the tender at the address and in the tender box or fax specified in the Tender Advert no later than the deadline for tender submission. Proof of posting will not be taken by Independent Development Trust as proof of delivery. Independent Development Trust will not accept a tender submitted telephonically, E-mail or by telegraph unless stated otherwise in the Tender Data.
- 23 Accept that, if Independent Development Trust extends the deadline for tender submission for any reason, the requirements of these Conditions of Tender apply equally to the extended deadline.

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

- |   |    |   |
|---|----|---|
| <b>Tender validity</b>                          | 24 | Hold the tender(s) valid for acceptance by Independent Development Trust at any time within the validity period after the deadline for tender submission.   |
|   | 25 | Extend the validity period for a specified additional period if Independent Development Trust requests the bidder to extend it. A bidder agreeing to the request will not be required or permitted to modify a tender, except to the extent Independent Development Trust may allow for the effects of inflation over the additional period.  |
| <b>Clarification of tender after submission</b> | 26 | Provide clarification of a tender in response to a request to do so from Independent Development Trust's Representative during the evaluation of tenders. This may include providing a breakdown of rates or Prices. No change in the total of the Prices or substance of the tender is sought, offered, or permitted except as required by Independent Development Trust's Representative to confirm the correction of arithmetical errors discovered in the evaluation of tenders. The total of the Prices stated by the bidder as corrected by Independent Development Trust's Representative with the concurrence of the bidder, shall be binding upon the bidder |
| <b>Submit bonds, policies etc.</b>              | 27 | If instructed by Independent Development Trust's Representative (before the formation of a contract), submit for Independent Development Trust's acceptance, the bonds, guarantees, policies and certificates of insurance required to be provided by the successful bidder in terms of the conditions of contract.   |
|   | 28 | Undertake to check the final draft of the contract provided by Independent Development Trust's Representative and sign the contract all within the time required by these Conditions of Tender. The Independent Development Trust to sign and issue the contract.   |
| <b>Fulfil BEE requirements</b>                  | 29 | Comply with Independent Development Trust's requirements regarding B-BBEE, Youth-owned, Disabled-owned and Black Women-owned Suppliers.   |

### **3 Independent Development Trust's undertakings**



**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

Independent Development Trust, and Independent Development Trust's Representative, shall:

- |                                 |   |   |
|---------------------------------|---|---|
| <b>Respond to clarification</b> | 1 | Respond to a request for clarification received earlier than the closing time for clarification of queries. The response is notified to all bidders.  |
| <b>Issue Addenda</b>            | 2 | If necessary, issue to each bidder from time to time during the period from the date of the Invitation until the closing time for clarification of queries, Addenda that may amend, amplify, or add to the tender documents. If a bidder applies for an extension to the deadline for tender submission, in order to take Addenda into account in preparing a tender, Independent Development Trust may grant such an extension and Independent Development Trust's Representative shall notify the extension to all bidders. |
| <b>Return late tenders</b>      | 3 | Tenders will be deemed late if they are not in the designated tender box at the date and time stipulated as the deadline for tender submission.   |
| <b>Tender opening</b>           | 4 | Open the tenders in the presence of the bidders' representatives who choose to attend at the time and place stated in the Tender Data. Tenders for which an acceptable notice of withdrawal has been submitted will not be opened.  |
| <b>Non-disclosure</b>           | 5 | Not disclose to bidders, or to any other person not officially concerned with such processes, information relating to the evaluation and comparison of tenders and recommendations for the award of a contract.   |
| <b>Grounds for rejection</b>    | 6 | Consider rejecting a tender if there is any effort by a bidder to influence the processing of tenders or contract award.  |
| <b>Disqualification</b>         | 7 | Instantly disqualify a bidder (and his tender) if it is established that the bidder offered an inducement to any person with a view to influencing the placing of a contract arising from this invitation to tender.  |
| <b>Test for responsiveness</b>  | 8 | Determine before detailed evaluation, whether each tender properly received <ul style="list-style-type: none"><li>• meets the requirements of these Conditions of Tender,</li></ul>   |

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

- has been properly signed, and
  - Is responsive to the requirements of the tender documents.
- 9 Judge a responsive tender as one which conforms to all the terms, conditions, and specifications of the tender documents without material deviation or qualification. A material deviation or qualification is one which, in Independent Development Trust's opinion would
- detrimentally affect the scope, quality, or performance of the works, services or supply identified in the Contract Data,
  - change Independent Development Trust's or the bidder's risks and responsibilities under the contract, or
  - affect the competitive position of other bidders presenting responsive tenders if it were to be rectified.
- Non-responsive tenders** 10 Reject a non-responsive tender, and not allow it to be subsequently made responsive by correction or withdrawal of the non-conforming deviation or reservation.
- Arithmetical errors** 11 Check responsive tenders for arithmetical errors, correcting them as follows:
- Where there is a discrepancy between the amounts in figures and in words, the amount in words shall govern.
  - If a bill of quantities applies and there is a discrepancy between the rate and the line item total, resulting from multiplying the rate by the quantity, the rate as quoted shall govern. Where there is an obviously gross misplacement of the decimal point in the rate, the line item total as quoted shall govern, and the rate will be corrected.
  - Where there is an error in the total of the Prices, either as a result of other corrections required by this checking process or in the bidder's addition of prices, the total of the Prices, if any, will be corrected.
- 12 Reject a tender if the bidder does not accept the corrected total of the Prices (if any).
- Evaluating the tender** 13 Evaluate responsive tenders in accordance with the procedure stated in the Evaluation Criteria. The evaluated tender price will be disclosed only

**PROCUREMENT OF AN AI-READY ELECTRONIC PORTFOLIO – PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS) FOR THE INDEPENDENT DEVELOPMENT TRUST**

to the relevant Independent Development Trust tender committee and will not be disclosed to bidders or any other person.

<b>Clarification of a tender</b>	14	Obtain from a bidder clarification of any matter in the tender which may not be clear or could give rise to ambiguity in a contract arising from this tender if the matter were not to be clarified.
<b>Acceptance of tender</b>	15	Notify the Independent Development Trust's acceptance to the successful bidder before the expiry of the validity period or agreed additional period. Providing the notice of acceptance does not contain any qualifying statements, it will constitute the formation of a contract between Independent Development Trust and the successful bidder.
<b>Notice to unsuccessful bidders</b>	16	After the successful bidder has acknowledged Independent Development Trust's notice of acceptance, unsuccessful bidders must consider their tenders unsuccessful if not contacted one month after date of tender closure.
<b>Prepare contract documents</b>	17	Revise the contract documents issued by Independent Development Trust as part of the tender documents to take account of <ul style="list-style-type: none"><li>• Addenda issued during the tender period,</li><li>• inclusion of some of the tender returnable, and</li><li>• Other revisions agreed between Independent Development Trust and the successful bidder before the issue of the Independent Development Trust's notice of acceptance (of the tender).</li></ul>
<b>Issue final contract</b>	18	Issue the final contract documents to the successful bidder for acceptance within one week of the date of Independent Development Trust's notice of acceptance.
<b>Sign Contract</b>	19	Arrange for authorised signatories of both parties to complete and sign the original contract. If either party requires the signatories to initial every page of the contract documents, the signatories for the other party comply with the request.
<b>Provide copies of the contracts</b>	20	Provide to the successful bidder one copy of the contract on the date of Independent Development Trust's acceptance of the tender.