

Bidder's Information: The Manager/Director

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Dear Sir/Madam

INVITATION TO BID: SCM 11/2023/SANC: APPOINTMENT OF AN ACCREDITED SERVICE PROVIDER FOR THE PROVISIONING OF THE SAGE 300 ENTERPRISE RESOURCE PLANNING (ERP) SOLUTION INCLUDING MAINTENANCE AND SUPPORT FOR A PERIOD OF FIVE (05) YEARS

The South African Nursing Council invites bidders to participate and submit bids/proposals for the above-mentioned bid.

You are requested to complete the tender documents and submit them in accordance with the stipulations mentioned hereunder.

1. The conditions contained in the attached annexures apply.
2. The bid must be deposited in the **tender box** using the following two (2) methods of submission on or before the closing date and time:
 - 2.1 **Envelope 01:** This envelope is for technical/administrative documents only- one (01) original document. **Envelope 02:** This envelope is for pricing only, i.e., pricing schedule and/or the formal quote by the bidder - one (01) original.
 - 2.2 The bidder is also required to submit in a **USB flash drive**.
3. The attached forms/annexures, if completed in detail and returned, will form part of your bid submission.
4. Please take note that, this bid will be evaluated in terms of 80/20 Preference Point System.
5. All communication should be made using an email, the cut-off date for all enquiries will be at **12h00 on 16 June 2023**.
6. **Bid documents must be deposited in the tender box situated at SANC Reception, Cecilia Makiwane Building, 602 Pretorius Street, Arcadia, Pretoria, 0083 before or on the closing date and time on 26 June 2023 at 12h00 South African time.**

 Cecilia Makiwane Building,
602 Pretorius Street, Arcadia, Pretoria 0083
Private Bag X132, Pretoria 0001,
Republic of South Africa

 Tel: 012 420 1000
Fax: 012 343 5400
SANC Fraud Hotline: 0800 20 12 16

 website: www.sanc.co.za

DIRECTIVE TO BIDDERS ON COMPLETION OF STANDARD BIDDING DOCUMENT FORMS OF BID PROPOSAL

1. The purpose of this document is to guide bidders on the completion of standard bidding document forms of the SANC bid.
2. The dates on all standard bidding documents must be a date which is within the bid advertising period.
3. The last column of the table below (this column must be ticked as an indication that each document and its requirements have been complied with by the bidder)

DOCUMENT	DIRECTIVE	COMPLIED/ NOT COMPLIED
Invitation to Bid	The bidder is required to complete this document in full and be signed off. The bidder must tick (circle/erase) "YES OR NO" on this document. The bidder may not ignore any clause and/or write "not applicable (N/A)" unless it is the only option available, e.g., are you a foreign based supplier for the goods/servicers/works offered? If the answer is no, then on the questionnaire to bidding foreign suppliers. The bidder may write N/A.	
Bidder's Disclosure	This document must be completed in full and be signed off. The bidder must tick (circle/erase) "YES OR NO" on this document and indicate not applicable where necessary. The bidder must disclose if the company or any of its directors have an interest in other companies whether they bid or not. Should a bidder have more companies to declare, such information can be provided on a separate sheet in the format prescribed in the form and attached to the bidder's disclosure form. Information captured must be in line with what is captured in the central supplier database.	
Central supplier database report	The bidder must attach a Central Supplier Database report printed from https://secure.csd.gov.za/	
Preference points claim form	The bidder must fully complete this document and sign off. The bidder must allocate correct preference points, the preference points claimed will be verified using the following: <ul style="list-style-type: none"> - Identity Documents - Broad-Based Black Economic Empowerment Certificate (B-BBEE certificate) - Companies and Intellectual Property Commission disclosure certificate - medical report for disability ownership The bidder must submit the documents above to qualify for preference points.	
Pricing schedule	The bidder must complete the supplied pricing schedule and sign-off. The bidder may add other applicable costs which may not be covered by the SANC pricing schedule. In addition, the bidder must submit a detailed price quotation on the company letterhead.	
Bid proposal	The bidder must submit a detailed bid proposal in line with the specifications/terms of reference	

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH AFRICAN NURSING COUNCIL					
BID NUMBER:	SCM 11/2023/SANC	CLOSING DATE:	26 JUNE 2023	CLOSING TIME:	12H00
DESCRIPTION	APPOINTMENT OF AN ACCREDITED SERVICE PROVIDER FOR THE PROVISIONING OF THE SAGE 300 ENTERPRISE RESOURCE PLANNING (ERP) SOLUTION INCLUDING MAINTENANCE AND SUPPORT FOR A PERIOD OF FIVE (05) YEARS				
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Mr PM Makhubedu		CONTACT PERSON	Mr M Makgolane	
TELEPHONE NUMBER	012 426 9570		TELEPHONE NUMBER	012 420 1030	
E-MAIL ADDRESS	tenders@sanc.co.za		E-MAIL ADDRESS	mmakgolane@sanc.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> 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**

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
2. TAX COMPLIANCE REQUIREMENTS
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:

SPECIAL REQUIREMENTS OF REQUEST FOR BIDS

1. CONTRACT PERIOD

- 1.1** The contract period stipulated in the terms of reference/ specification is considered a valid contract period.
- 1.2** SANC reserves the right to extend or cancel the contract, pending available funding and satisfaction with service delivery.

2. ACCEPTABLE BIDS/OFFERS

- 2.1** The SANC may request interviews/presentations/pitching sessions with shortlisted Suppliers/ service providers before the final selection is made.
- 2.2** The SANC will not be liable for any cost incurred by a supplier /service provider in the process of responding to this bid, including on-site presentations and the preparation of the proposal.
- 2.3** The SANC will not consider any late quotations. All bids submitted after the stipulated closing date and time will not be disqualified.
- 2.4** Any effort by the supplier/ service provider to influence bid evaluation members, bid comparisons or bid award decisions in any manner, will result in rejection of the bid concerned.
- 2.5** The successful supplier/ service provider will be informed in writing with an appointment letter or per an official order.
- 2.6** **The bids have a validity period of 120 days from date of closure.**
- 2.7** Where it is discovered that an advantaged company used a disadvantaged person, as a “front” to acquire a bid, such company will be disqualified, and the bid shall be withdrawn.
- 2.8** Only bids complying with all requirements as stipulated in the Terms of Reference/Scope of Work or Specification will be regarded as acceptable.
- 2.9** Bids will be evaluated based on mandatory requirements, functionality (if applicable), Specific goals and other conditions stipulated in the terms of reference/ specification.
- 2.10** The supplier/ service provider must submit all requirements indicated in the bid documents at the closing date and time of the request for the bids. Supplier/ service provider who fail to comply with any of the mandatory and other requirements will be disqualified.

3. SUBMISSION OF BIDS/ RETURNABLE DOCUMENTS

- 3.1** The supplier/ service provider will be required to submit their bids /proposals in a tender box situated at the Reception of the Cecilia Makiwane Building.
- 3.1.1** Tenderers are required to submit a completed request for quotation pack (this documents), including:
 - a) Duly completed and signed bid documents.

- b) Adherence to requirements relating to all returnable documents will prove compliance with specific requirements as stipulated in the terms of reference at the closing date and time.

3.2 Any supplier/ service provider who fails to comply with any requirement of the bid, at the discretion of the evaluation team, will be regarded as non-compliant and as a result be rejected.

4. PAYMENTS

4.1 SANC undertakes to pay delivery validated invoices in full within thirty (30) days from the invoice date or upon agreed payment intervals as accepted in the contract. All invoices should be sent to the following email address: sancinvoices@sanc.co.za.

4.2 No invoices for outstanding deliverables or for any unproductive or duplicated time spent by the service provider will be validated for payment.

4.3 Invoices should be emailed, or hand delivered to SANC timeously.

4.4 The invoices should be original and must be accompanied by an inspection certificate and/or proof of delivery.

5. SUPPLY / DELIVERY VALIDATION

5.1 The certificate and the related report of delivery/installation/ progress milestone/commissioning will be validated by a SANC representative prior to payment of final invoices.

6. TAX COMPLIANCE REQUIREMENTS

6.1. It is a condition of this bid that the tax matters of the successful supplier/ service provider are in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the tax obligations.

6.2. The Tax Compliance status requirements are also applicable to potential foreign suppliers, service providers or individuals who wish to submit the bid.

6.3. It is a requirement that a supplier/ service provider grant a written confirmation when submitting this bid response that SARS may on an on-going basis during the tenure of the contract disclose the tax compliance status and by submitting this bid such confirmation is deemed to have been granted.

6.4. The Suppliers/ service providers are required to be registered on the Central Supplier Database (CSD) and the SANC shall verify the tax compliance status through the CSD or through SARS.

6.5. Where Consortia / Joint Ventures / Sub-Contractors are involved, each party must be registered on the Central Supplier Database and their tax compliance status will be verified through the CSD or through SARS.

6.6. The supplier/ service provider who are not tax compliant will be notified of their non-compliant status and be given seven (7) calendar days to rectify their tax compliance status with SARS, failure

your bid will be disqualified.

- 6.7. The SANC will not award a bid to any supplier/ service provider whose tax matters are not in order.

7. VALUE ADDED TAX

- 7.1. All contract prices are inclusive of 15% Value Added Tax (VAT), except in the case of a person that is not required to register for Value Added Tax. Companies not registered in terms of Value Added Tax, may not claim VAT on invoices.

8. NEGOTIATIONS

- 8.1. The SANC to negotiate with one or more preferred supplier(s)/ service provider(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other supplier(s)/ service provider(s) who have not been awarded the status of the preferred supplier(s)/ service provider(s).

9. PRICE QUALIFICATION

- 9.1. Prices for this contract are firm.
- 9.2. All prices shall be quoted in South African rand (ZAR).
- 9.3. The bid prices shall be given in the units shown and will be awarded as a whole, not per item.
- 9.4. **Prices must be inclusive of delivery cost and all taxes.**
- 9.5. Please note that the foreign exchange risk in case of imported goods and service is for the account of the supplier/ service provider.
- 9.6. Non-firm prices (including prices subject to the rate of exchange variation) will not be considered.
- 9.7. No changes or extensions or additional ad-hoc costs are accepted once the contract has been awarded and/or signed.
- 9.8. Detailed information is optional and is provided as Annexures to the details of the bid.

10. COMMUNICATION

- 10.1. Communication will only be restricted to Supply Chain Management Officials.
- 10.2. The South African Nursing Council may request clarification in writing regarding the information provided by bidders. Supplier(s)/ service provider(s) are to supply the required information within the specified period. Failing to do so will **invalidate** your bid.

11. INTELLECTUAL PROPERTY

- 11.1. All the information contained in this document is intended solely for the purpose of assisting supplier(s)/ service provider(s) to prepare their bid. Any use of the information contained herein for another purpose than those stated in this document is prohibited.

- 11.2. The ownership and intellectual property rights of all designs, specifications, programming code and all other documentation provided by SANC to the supplier(s)/ service provider(s), both successful and unsuccessful, remain the property of SANC.

12. SUPPLIER DUE DILIGENCE

- 12.1. SANC may conduct due diligence to all shortlisted supplier(s)/ service provider(s) to identify their specific capabilities and financial stability.
- 12.2. The SANC may visit the premises of the supplier(s)/ service provider(s) or that of their suppliers.
- 12.3. Some of the key elements that should be documented and included during the comprehensive supplier analysis/due diligence include: the current workload of the supplier, cost structure of the BID, the financial status of the supplier(s)/ service provider(s) the previous customer satisfaction levels, the support capabilities, their relative strength, weaknesses and core capabilities, how SANC fits into the supplier(s)/ service provider(s) business and how the supplier(s)/ service provider(s) is viewed by the public, etc.
- 12.4. Supplier(s)/ service provider(s) may be required to provide names of traceable references who may also be visited to confirm their testimonials.

13. DISPUTES

- 13.1. The relevant bidder agrees that should any dispute arise from the contract, the matter shall be submitted to the relevant authority for a ruling and such ruling shall be final.

14. PREFERENCE POINTS CLAIM (SPECIFIC GOALS)

- 14.1. Proof of Specific goals Ownership and verification may be conducted in various forms including but not limited to the following documents namely: - CIPC documents, valid copy of B-BBEE certificate, copy of Identity document, medical report for disability ownership and declaration letter signed by the tenderer. Failure to attach proof, the tenderer will be allocated 0 points on specific goals.

15. JOINT VENTURE/ TRUST/ CONSORTIUM

- 15.1. A trust, consortium or joint venture must submit an agreement to be recognized as an entity.
- 15.2. A trust, consortium or joint venture will qualify for points for their specific goals as a legal entity, provided that the entity submits their B-BBEE status level certificate. CIPC documents, copy of Identity document, medical report for disability ownership and declaration letter signed by the tenderer. Failure to attach proof, the tenderer will be allocated 0 points on specific goals.

TERMS OF REFERENCE FOR THE APPOINTMENT OF AN ACCREDITED SERVICE PROVIDER FOR THE PROVISIONING OF THE SAGE 300 ENTERPRISE RESOURCE PLANNING (ERP) SOLUTION INCLUDING MAINTENANCE AND SUPPORT FOR A PERIOD OF FIVE (05) YEARS

1. PURPOSE

- 1.1.** The purpose of this document is to invite credible, suitably qualified, capacitated, and experienced bidders, who are current SAGE Business Partners to submit proposals for the provisioning of the required software licensing and deployment of Sage 300 ERP solution at the SANC including maintenance and support contract for a period of five (05) years.

2. OBJECTIVES

- 2.1.** The following objectives are to be met during the execution of the project and will be regarded as key success factors:
- 2.1.1. Improve current business processes to attain the business objectives and achieve maximum compliance to policies, other prescripts, and best practice.
 - 2.1.2. Implemented solution that is scalable to accommodate future growth of the organisation's business.
 - 2.1.3. Implemented solution that is a fit to the business requirements.
 - 2.1.4. Implemented solution which accommodate changes and future system enhancements.
 - 2.1.5. Implemented solution which represents the most recent version of the solution and enables the required functional richness.
 - 2.1.6. The solution integrates to other current and future business applications via standard industry interface protocols.
 - 2.1.7. Data migration is to be accurate and complete.
 - 2.1.8. Ensure data integrity and data security by implementing quality control procedures at data entry levels.
 - 2.1.9. Provide a single view of the SANC information.
 - 2.1.10. Ensure that reports are drawn from a single source.
 - 2.1.11. Provide a secure authentication functionality that allows for login and authorization based on user roles.
 - 2.1.12. Provide well-trained and knowledgeable end-user resources.
 - 2.1.13. Comprehensive reporting is available and, in the format, required.

3. BACKGROUND OF THE PROJECT

3.1. THE TECHNOLOGY ENVIRONMENT OF THE SANC

This section provides the potential bidder with the current ICT capability that is available at the SANC and is in line with the implementation of the SAGE project.

3.1.1. ICT INFRASTRUCTURE:

- 3.1.1.1. Standardised on Microsoft Server 2019,
- 3.1.1.2. Databases – standardised on MS SQL 2019,
- 3.1.1.3. End-User equipment operating system – Windows 10 & 11,
- 3.1.1.4. Data backup solution – VEEAM backup solution, and
- 3.1.1.5. WAN connectivity – 400 Mbps primary link.

3.2. EXISTING CORE APPLICATIONS AT THE SANC:

- 3.2.1. Nurse Register (proprietary solution),
- 3.2.2. Microsoft 365 Enterprise 5,
- 3.2.3. Therefor Records Management System,
- 3.2.4. Modern Assets cloud

3.3. EXISTING SAGE MODULES AT THE SANC:

- 3.3.1. Accounts payable,
- 3.3.2. General Ledger
- 3.3.3. Bank,
- 3.3.4. Employee Self Service (ESS) leave management, and
- 3.3.5. Sage VIP Payroll.

3.4. KEY SUPPORTING INFORMATION:

- 3.4.1. Number of accounts payable entities (active and inactive) – 951,
- 3.4.2. Number of accounts payable receivable entities (active and inactive) – 0,
- 3.4.3. Number of estimated accounts receivable to be created - 350 000,
- 3.4.4. Number of bank accounts / investment accounts – 22,
- 3.4.5. Number of business units and business sections – 11 business units and 41 business sections (these may increase),
- 3.4.6. Number of General Ledger accounts – 2304,
- 3.4.7. Number of General Ledger dimensions required - minimum 4,
- 3.4.8. Number of legacy financial period information to be migrated/taken on – preferably as from 1 April 2010,
- 3.4.9. Number of legacy Employee Self Service period information to be migrated/taken on – preferably as from 1 April 2010, and

3.4.10. Number of legacy payroll period information to be migrated/taken on – preferably as from 1 April 2010.

NB: IT MUST BE NOTED THAT THE SANC WILL MAKE PROVISION THE ON-SITE HARDWARE INFRASTRUCTURE AS REQUIRED BY THE BIDDER

4. SCOPE OF WORK

The proposed on-premises solution by the service provide must be able to address the following requirements of the SANC as standard offering:

4.1. FINANCIAL MANAGEMENT:

4.1.1. ACCOUNTING CAPABILITIES

- 4.1.1.1. The system must be able to do all accounting transactions i.e. (accounting for invoices, credit note, debit note, etc.)
- 4.1.1.2. Uploading/ processing journal Entries
- 4.1.1.3. Posting of journal entries
- 4.1.1.4. System should be able to process bank feeds.
- 4.1.1.5. System should be able to send remittance advices directly to supplier's/service providers.
- 4.1.1.6. Financial reports per Business Unit
- 4.1.1.7. Interpret final trial balance to financial statement format.
- 4.1.1.8. Capture budgets and forecasts
- 4.1.1.9. Reports of all transactions such as (Budget variances, Reconciliations, Trial Balance, Age Analysis, General Ledger per business unit)
- 4.1.1.10. Produce consolidated management accounts as well as for each business units and functions.
- 4.1.1.11. Management accounts should entail comparison of actual expenditure to budgeted/project expenditure for current period (one month only), year to date period and forecast period.
- 4.1.1.12. Produce variances in values and percentage form.
- 4.1.1.13. Option to upload Excel or CSV files for journal entries, budgets, and forecasts.
- 4.1.1.14. Export financial reports (general ledger (GL) dump, trail balance, etc.) in excel or CSV file.
- 4.1.1.15. Drill down trial balance items to GL, to sub-GL and to journal entries
- 4.1.1.16. System should disallow processing of transactions (budgets, journal entries, etc.) in a closed.
- 4.1.1.17. Closed off period should only be opened upon special request by a relevant person.
- 4.1.1.18. System to only allow processing of balancing transactions.
- 4.1.1.19. Trial balance should balance.
- 4.1.1.20. Exception reports on unbalancing transactions

4.1.1.21. General Ledger, All sub-ledgers, Accounts Payable, Accounts Receivable, Purchase Orders, Vendor relationship/Workflow and

4.1.1.22. Cashbook and Bank reconciliation

4.1.2. **TAX MANAGEMENT CAPABILITIES**

4.1.2.1. Capture the VAT types (Input, output VAT, exempt suppliers etc.)

4.1.2.2. Provide reports of tax i.e., VAT 201, EMP501, PAYE

4.1.2.3. Summary of VAT transactions

4.1.2.4. Update tax tables (rates) or as when SARS updates the tax tables.

4.1.3. **ASSET MANAGEMENT CAPABILITIES**

4.1.3.1. Generate asset ID numbers for new assets in a sequence (Asset ID) i.e., SANC00002319

4.1.3.2. Load asset useful life and updated useful life.

4.1.3.3. Accommodate the use of different depreciation methods, ability to apportion the depreciation using numbers of days as well as months.

4.1.3.4. Assets reconciliation with the general ledger

4.1.3.5. Assets reconciliation to agree to the general ledger (integration of the fixed asset and GL)

4.1.3.6. Asset tracking report, this report will be used to do asset verification. This is the report without Asset register report outlining the following: location, user, barcode/serial number, depreciation amount, useful life remaining and carrying value.

4.1.3.7. Asset inventory report (Custodian report)

4.2. **SUPPLY CHAIN MANAGEMENT**

4.2.1. **SUPPLIER DATABASE**

4.2.1.1. Add new vendors and updating information as and when required.

4.2.1.2. Verify vendor banking details via CSD and Tax compliance through SARS.

4.2.1.3. Specify service types for each vendor.

4.2.1.4. Produce database reports (service types, ownership, B-BBEE, etc.)

4.2.1.5. Assign user rights for segregation of duties.

4.2.1.6. Upload supplier catalogues for goods and services.

4.2.2. **PROCUREMENT**

4.2.2.1. Tender Bid Management – Log RFP request, update them after every milestone, upload tender documents and extract reports of open and closed tenders.

4.2.2.2. Log RFQ requests

4.2.2.3. Closed open calls once quotations have been received.

- 4.2.2.4. Attach documents/quotes received (system to have enough space to accommodate documents/quotes received)
- 4.2.2.5. Track and escalate open RFQ calls as per turnaround time provided.
- 4.2.2.6. The system to have sufficient space for the specification to be fully captured.
- 4.2.2.7. Import and export documents in PDF, CSV, Excel, JPG, etc.
- 4.2.2.8. Extract reports in Excel, CSV, etc.
- 4.2.2.9. Capture purchase requisitions
- 4.2.2.10. Capture approval routing for requisitions as per the delegation of authority
- 4.2.2.11. System to set controls of approvals from 1st approver at all times as per delegation of authority.
- 4.2.2.12. System to send alerts to requisition approvers once requisition has been raised.
- 4.2.2.13. System to attach CSV, Excel, PDF files whilst raising a requisition.
- 4.2.2.14. System to generate purchase orders.
- 4.2.2.15. Capture approval routing for purchase orders as per the delegation of authority
- 4.2.2.16. System to set controls of approvals from 1st approver at all times as per delegation of authority.
- 4.2.2.17. System to send out alerts to purchase order approvers once purchase order has been generated.
- 4.2.2.18. Functionality to send Purchase orders directly to suppliers/service providers.
- 4.2.2.19. System to be able to produce procurement reports i.e., Open Order Report, Conversion of requisitions to purchase orders report, requisition and purchase order approval report, receipting days.
- 4.2.2.20. Selection of Item numbers or items of goods or services relating to supplier catalogues
- 4.2.2.21. System to receipt open purchase orders (confirming delivery of purchase order)

4.2.3. CONTRACT MANAGEMENT

- 4.2.3.1. Capture and maintain Service Level Agreements (SLAs)
- 4.2.3.2. Present SLA by business units
- 4.2.3.3. Send out alerts prior to contract's expiry dates.
- 4.2.3.4. Set up reminder dates prior to contract expiry date.
- 4.2.3.5. Extract report of contracts in excel format.
- 4.2.3.6. Attach/upload SLAs/contracts using PDF format.
- 4.2.3.7. System to have enough space to accommodate uploading of SLA's/contract documents.

4.3. HUMAN RESOURCES MANAGEMENT

4.3.1. E-RECRUITMENT AND SELECTION

- 4.3.1.1. Ability to provide report with a list of positions on the annual recruitment plan and ability to extract a progress report against each position.
- 4.3.1.2. Ability to set up the job requisition and incorporate a competency-based job profile consisting of accurate job descriptions that are non-discriminatory and legally compliant.
- 4.3.1.3. Ability to publish jobs to multiple channels including the client's own website and intranet, as well as an extended reach and exposure to leading South African websites for added exposure, ensuring that the client's brand and jobs receive maximum exposure to SA's largest pool of quality candidates.
- 4.3.1.4. Ability to generate our own company 'talent pool' and search for Resumes with advanced search tools. The Resume database will be automatically searched for candidates who match our job requisition requirements.
- 4.3.1.5. The system must be able to save time and increase efficiency with superior response handling tools including online screening, multiple regret, contacting tools and resume shortlist features. The response handling should contain the following functionality: Requisition, job posting, candidate management, searching, screening, and short-listing, interview, selection, offer, reporting, and hiring manager information.
- 4.3.1.6. The system must elegantly accommodate a flexible organizational structure that will be created and will be specifically based on the requirements of the company.
- 4.3.1.7. The system should be flexible to allow for multiple recruitment processes and permissions and takes into account the recruitment process per division and the corresponding approvals framework per process.
- 4.3.1.8. The system should be an interactive system which sends email triggers to the relevant parties (HR and line management) to advise on actions needed to move forward in the process (Including automatic closing of adverts and status changes).
- 4.3.1.9. The system must be able to protect candidate information from unauthorized persons, should be able to use passwords, provide user activities and approvals for the recruitment team, in addition, firewalls and antivirus.
- 4.3.1.10. The system must be able to extract recruitment and selection records into various formats e.g. PDF, Excel, legislative format, SETA requirements, COIDA etc.
- 4.3.1.11. The bidder should provide us with proof that the e-recruitment system adheres to and is in line with all relevant legislation.
- 4.3.1.12. The system should have the functionality to generate reports according to organisational requirements and employment equity requirements. The bidder should as part of the

response attach some of the reports to give a good picture of the “look and feel” of those reports.

- 4.3.1.13. The bidder should provide information on how and where candidate information will be stored, managed, and utilized in the system. Provide guidelines on how to manage this data in the system. An easy-to-use functionality should be provided to search for candidate data and store reports that can be used by the recruitment team.
- 4.3.1.14. The system must allow recruiters to do online reference checking or be linked to such a system or integrate with such a system. This will allow full system utilization and therefore value.
- 4.3.1.15. The system should enable recruitment reports from candidate activities, recruitment activities, recruiter performance management and SLA adherence, and turnaround times to fill vacancies.
- 4.3.1.16. The service provider must provide information on the training that is used to accredit users, different types of users, and related information. In addition, training information such as materials, trainers’ profile and evaluation of training conducted should ideally be shared.
- 4.3.1.17. The e-recruitment system must provide an agency portal for all the agencies on the preferred supplier list, which allows agencies to register on the system their candidates, communication with the organization via the system and to allow the recruitment team to manage issues of which agencies’ candidates. The agency portal must also have functionality for performance management, so that this helps in selecting our preferred suppliers.
- 4.3.1.18. The system must not allow for duplications as we have experienced issues where we do not know nor are not certain of candidates whether candidates are registered with which agency, which agencies send the candidate first and whether the same candidates is registered on our database or applied for positions before.
- 4.3.1.19. The system must have the functionality to allow recruiters to share information on different requisitions, candidates, and line managers. This is process is predominantly managed manually and it is advisable to ensure that it is integrated to the e-recruitment system. In addition, the system must be able to allow e-approval or e-signing of contracts.
- 4.3.1.20. The system must allow for each position to have a unique job code that links to the job description and will provide simplified reporting.
- 4.3.1.21. The system must allow for a document to be formatted for instance to transfer a document PDF to a word document or from html to another format.

4.3.2. PERSONEL MANAGEMENT

- 4.3.2.1. Employee records (e.g., employee file, health records)
- 4.3.2.2. System capability for staff to update personnel records, with approval by supervisor/ human resources capabilities.
- 4.3.2.3. Employee occupational health and safety records
- 4.3.2.4. Employment equity occupational level classification as per statutory requirements.
- 4.3.2.5. Pre- first day preparation and on-boarding process which functions performed by the new employee, Finance, ICT, HR, Facilities, and other departmental.
- 4.3.2.6. Off-boarding process which includes exiting employee (online exit interviews), Finance, ICT, HR, Facilities, and other departments.
- 4.3.2.7. Ability to capture and extract employee training information e.g. qualifications of staff, training attended whilst at the SANC etc.
- 4.3.2.8. Ability to monitor and track resettlement obligations and sent email notification to Human Resources, the line manager/ supervisor and the employee.
- 4.3.2.9. Ability to monitor and track probation period of an employee and assign responsibilities in terms of the SANC Probations Policy.

4.3.3. PERFORMANCE MANAGEMENT

- 4.3.3.1. Enable employee contacting, conduct employee self-evaluation and supervisor evaluations, and complete employee/ supervisor assessments (support attachment of supporting evidence for performance scores).
- 4.3.3.2. Ability to send email reminders to staff members on performance agreement/ assessment submission dates and send reminders on overdue submission.
- 4.3.3.3. Ability to generate report to indicate staff that submitted performance agreements/ assessments.
- 4.3.3.4. Ability to generate previous/ historic and current assessments, implemented individual development plans, performance improvement plans etc.
- 4.3.3.5. The system must be designed according to the SANC performance management cycle.
- 4.3.3.6. Administrator rights to “open and close” the system throughout the different phases in line with entity policy dates
- 4.3.3.7. Customised templates in line with SANC templates including the functionality to view corporate score card.
- 4.3.3.8. Performance contracting, interim review, and final assessment (360-degree assessment)
- 4.3.3.9. Analytics reports, including average performance scores, similar scoring, Divisional/ Departmental/ Sectional performance assessment, bell curve etc.

4.3.3.10. Links to talent management and succession planning functions

4.3.3.11. Links to a competency framework.

4.3.4. ORGANISATIONAL DESIGN

4.3.4.1. Create, update, and maintain positions with a position identification system (load supporting documents)

4.3.4.2. Generate organisational structures etc.

4.3.4.3. To track open positions, filled positions, frozen positions on the approved organisational structure.

4.3.4.4. Extract reports for staff compliments per Division/ Department/ Section.

4.3.4.5. Extract job evaluation information/ reports for all positions aligned to the approved job evaluation system.

4.3.4.6. Extract job profiles with competency requirements, key performance areas and general job information.

4.3.4.7. Establish and maintain salary structures and ranges by grade.

4.3.4.8. Ability to facilitate base salary increases, merit increases and incentives given to Staff members.

4.3.4.9. Ability to extract total cost to company remuneration for individual employees and to facilitate restructuring of salary for new/ existing staff.

4.3.4.10. Ability to automatically generate salary increase letters and provide summarised reports of the same.

4.3.4.11. The system must have capabilities to link approved and budgeted positions in the organisational structure to the available budget per position in each financial year.

4.3.5. LABOUR RELATIONS/EMPLOYEE RELATIONS

4.3.5.1. Capture the nature of the case (disciplinary or grievance process)

4.3.5.2. Capture details of the case (charges/ nature of grievance)

4.3.5.3. Status updates (initiation, investigation, hearing, outcome, appeal, CCMA etc.)

4.3.5.4. Document upload functionality (evidence documents, registers, investigation report)

4.3.5.5. Alert for suspensions via email

4.3.5.6. Provide time frames and progress for grievance and misconduct cases from the initial date until finalisation.

4.3.5.7. Ability to provide reports on progress of grievance and misconduct cases.

4.3.5.8. Ability to automatically track and report on the expiry of a sanction (three months, six months, and twelve months for e.g.).

4.3.5.9. Employee Assistance Programme (EAP) records and ability to initiate EAP referrals by the employee, supervisor, and human resources.

4.3.6. EMPLOYEE SELF-SERVICE (ESS/MSS)

4.3.6.1. Configure entity leave rules.

4.3.6.2. Leave application and deletion.

4.3.6.3. Leave forfeiture alerts.

4.3.6.4. Team leaves overview capability.

4.3.6.5. Management ability to view subordinate's leave records.

4.3.6.6. Alerts/ escalation for unattended leave requests

4.3.6.7. Real-time leave balances

4.3.6.8. High quality e-payslips (download and print)

4.3.6.9. IRP5 viewing and printing.

4.3.6.10. Feeds into Payroll leave management system.

4.3.6.11. Employee self-service to download confirmation of employment letters (for purposes of school admissions, credit applications and visa applications)

4.3.6.12. Capture payroll related claims (subsistence, travel, and overtime)

4.3.7. TALENT MANAGEMENT (TRAINING AND DEVELOPMENT, AND SUCCESSION PLANNING)

4.3.7.1. Capture personal development plans (each employee to have ability to capture and line management with approving rights)

4.3.7.2. Administrator to capture learning and development interventions.

4.3.7.3. Run reports in line with statutory requirements (e.g., gender, race, disability, training intervention, NQF levels, cost, duration occupational level etc.)

4.3.7.4. Succession planning tracking and reporting

4.3.7.5. System capabilities to extract training information to Workplace skills plan and Annual Training report format and SANC reporting requirements.

4.3.7.6. Update/ progress on the implementation of the Workplace Skills plan and individual development plans per occupational levels, per Division/ Department/ Section.

4.3.7.7. Monitor implementation of the bursary and management of employee service obligations.

4.3.7.8. Monitor training expenditure per employee, per Division/ Department/ Section and monitor the service obligation in line with the Training and Development Policy.

4.3.7.9. Ability to schedule approved training through the system and monitor confirmation of attendance.

4.3.7.10. Ability to conduct training needs analysis against the approved job profile and identify suitable training interventions.

4.3.7.11. Ability to capture competency assessment results/ reports and monitor implementation of recommendations.

4.3.8. LEAVE MANAGEMENT

4.3.8.1. Leave dashboards in line with entity leave rules.

4.3.8.2. Customised leave reporting (variance reports, sick leave, annual leave, family responsibility leaves etc.)

4.3.8.3. Integration with ESS/MSS

4.3.8.4. Month to month leave closure and openings, extraction of leave report for specific months.

4.3.8.5. Ability to highlight and prevent submission of duplicate leave transactions.

4.3.8.6. Ability to avoid staff from applying leave during public holidays and special leave periods.

4.3.8.7. Ability to separate accumulated leave carried over from previous financial years per specific financial year.

4.3.9. PAYROLL

4.3.9.1. Employee Records

4.3.9.1.1. Employee personal details record

4.3.9.1.2. Next of kin contacts

4.3.9.1.3. Role details (job title, grade, remuneration- basic salary, allowances, employer contributions, total cost to company)

4.3.9.1.4. Benefits administration (Provident fund, pension fund, medical aid, etc.)

4.3.9.2. Variance report (month to month comparison)

4.3.9.3. PAYE calculations

4.3.9.4. Tax certificates and IRP5 reconciliations

4.3.9.5. Integration of all HR modules

4.3.9.6. Standard template that can be customized using multiple employee details from an excel spreadsheet (e.g., salary increase letters, performance bonus letters etc.)

4.3.10. WORKFLOW

4.3.10.1. Provide built-in approvals for a hierarchy (multiple levels) of approvers.

4.3.10.2. Provide for approval by role, where anyone who is assigned, the role can approve incoming requests.

4.3.10.3. Allows the re-allocation or delegation of tasks from one approver to another.

- 4.3.10.4. Allows the assignment of observers and e-mail recipients to workflow processes.
- 4.3.10.5. Automatically send e-mail notices to approvers to inform them that they have a request that requires attention.
- 4.3.10.6. Automatically sends e-mail notices to the initiator of a request to let him/her know it has been approved.
- 4.3.10.7. Allows users to view outstanding workflow transactions in various states such as pending or complete.
- 4.3.10.8. Allow out of the office delegations to automatically manage workflows during an individual's absence.
- 4.3.10.9. Allow users to cancel pending workflows (e.g., when an employee leaves the service provider).
- 4.3.10.10. Provides wizards to walk managers through work event processes.
- 4.3.10.11. Uses audit trails to capture all modifications to employee information.
- 4.3.10.12. Captures the date and time when a request was approved.
- 4.3.10.13. Captures who approved a request.
- 4.3.10.14. Capture approver comments associated with a request.
- 4.3.10.15. Perform real-time updates to employee information.
- 4.3.10.16. Allows users to make date-sensitive changes, which are applied on the desired date.

4.3.11. OTHER REQUIREMENTS

- 4.3.11.1. Integrated reports
- 4.3.11.2. Develop automated reports and dashboards per module.
- 4.3.11.3. All modules to integrate with each other.
- 4.3.11.4. System should integrate with other systems through API (Application programming interface)
- 4.3.11.5. System processes should be automated through the use of workflows.
- 4.3.11.6. A training plan and training to be conducted for super users and system administrators.
- 4.3.11.7. End user training plan and training for all modules
- 4.3.11.8. Import and Export to excel, CSV, PDF etc.
- 4.3.11.9. Segregation of duties/delegation of authority
- 4.3.11.10. The system should be hosted within SANC environment.
- 4.3.11.11. System to comply with POPIA (Protection of Personal Information Act)
- 4.3.11.12. Accurate and complete data migration
- 4.3.11.13. Human resources analytics
- 4.3.11.14. Render Business analysis and solution architect services

4.4. APPROPRIATE INFORMATION SECURITY FUNCTIONALITIES TO INCLUDE:

- 4.4.1. Must ensure the confidentiality, integrity, and availability of information during processing, at rest and during transmission.
- 4.4.2. Must provide audit logs recording critical employee activities, exceptions, and information security events.
- 4.4.3. Access must be managed via the active directory single sign on.
- 4.4.4. Must provide role-based access to reduce the risk of unauthorised, unintentional, or intentional view of information assets.
- 4.4.5. Must provide and implement software patches or updates for the software to protect against malicious codes.
- 4.4.6. The system should provide disaster recovery capabilities.
- 4.4.7. Regular maintenance which includes the necessary software patches.
- 4.4.8. The solution must display appropriate error alerts.
- 4.4.9. Must provide for segregation of duties.

5. DELIVERABLES

- 5.1.1. The key deliverables and outputs expected from the software solution are as follows:
 - 5.1.1.1. Provision of software licenses and annual renewals over the contract period.
 - 5.1.1.2. The proposed solution must include the financial management, supply chain management, human resources, and payroll comprehensive modules.
 - 5.1.1.3. Perform ad-hoc customization of the system to meet the unique business needs of the SANC.
 - 5.1.1.4. The service provider must provide support and maintenance for a period of five (5) years.
 - 5.1.1.5. As part of the Support and Maintenance, the service provider must perform upgrades of the system in line with Software Assurance.
 - 5.1.1.6. Develop automated reports and dashboards per module.
 - 5.1.1.7. The software solution should have appropriate security functionalities/ features.
 - 5.1.1.8. Accurate and complete data migration from old system to the new one.
 - 5.1.1.9. The service provider should provide the following:
 - 5.1.1.9.1. A skill transfer plan and skill transfer for the system administrators and super users A training plan and training to be conducted for super users and system administrators.
 - 5.1.1.9.2. End user training plan and training for all modules.
 - 5.1.1.9.3. A detailed project plan for the implementation of the software.
 - 5.1.1.9.4. A pro-forma service level and escalation matrix.
 - 5.1.1.9.5. Provide monthly service level reports.

6. REQUIRED COMPETENCIES

- 6.1.1. The service provider must be a SAGE accredited partner to provide and implement solutions.
- 6.1.2. The service provider must have implemented at least two (2) projects in SAGE modules for Human Resources and Finance.
- 6.1.3. The service provider must have resources with the requisite level of skill, integrity, and professional competence to deliver the project successfully at all times.

7. SERVICE PROVIDER FEES

- 7.1. The agreement will consider (but may not be limited to):
 - 7.1.1. The standard fee structures of the software.
 - 7.1.2. Training, education, and skills transfer.
 - 7.1.3. Support and maintenance.
 - 7.1.4. All fees quoted must include VAT.

8. BIDDER PERFORMANCE MANAGEMENT

- 8.1. The successful bidder shall, upon receipt of written notification of an award, be required to conclude a Service Level Agreement (SLA) with the SANC, which will form an integral part of the contract. The SLA will serve as a tool to measure, monitor, and assess the bidder performance to be measured based on milestones and ensure effective delivery of service, quality and value-add to SANC's business.

9. DEPLOYMENT APPROACH

- 9.1. The SANC will require that the successful bidder shall strictly adhere to the SAGE 300 implementation methodology.
- 9.2. The SANC will require that the vendor provide for costs, at its expense, associated with an independent review and reporting to the SANC as to the quality, completeness, effectiveness, scheduling, cost optimisation and fit for purpose/alignment with SANC business requirements monthly.
- 9.3. The SANC will require that the successful bidder shall provide the critical care for a period of three (03) months on in-scope functionality delivered by the bidder.
- 9.4. The SANC will require the successful bidder to provide support and maintenance for a period of five (05) years. SANC expects the service provider to perform the related professional services (e.g., best practices guidance, training, project management, implementation, integration, and report development) in a timely and professional manner. Services should be provided by experienced

experts who have successfully implemented similar solutions with similar requirements for the modules as required.

- 9.5.** The successful Bidder shall be responsible for the final approved design, installation, implementation, and commissioning of the solution, including development of user acceptance testing, end-user training and the required system integration.

10. REQUIREMENTS FULFILMENT

- 10.1.** Only responses from Bidders who can provide all the products, goods and services as well as have the required maintenance and support capability and capacity.
- 10.2.** Only submissions which comply with all the stated requirements will be considered.

11. SPECIAL CONDITIONS

- 11.1.** The South African Nursing Council reserves the right:
- 11.1.1. To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other bidder(s) who has not been awarded the status of the preferred bidder(s).
 - 11.1.2. To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the bid.
 - 11.1.3. To correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process; and
 - 11.1.4. To cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.
 - 11.1.5. To accept part of a tender rather than the whole tender.
 - 11.1.6. Only bids for which all required information was provided will be considered during this evaluation phase.
 - 11.1.7. The SANC retains the right to clarify information provided where it deems necessary.
 - 11.1.8. Thus, the Council has the right to award the contract to the Bidder that did not score the highest total points.

12. CONTRACTUAL OBLIGATIONS

- 12.1.** The service provider contract will be entered into between the SANC and the service provider, and reporting on the progress and implementation of the software will be made to the SANC.

13. PROJECT IMPLEMENTATION TIMELINES

13.1. The project is estimated to run for a period of five (5) years and divided as follows:

13.1.1. Once-off implementation to be completed within twelve (12) months after the contract was signed.

13.1.2. Support and maintenance for a period of Sixty (60) months.

14. DUTIES AND RESPONSIBILITIES OF THE SERVICE PROVIDER

14.1. The Service Provider resources will be expected to:

14.1.1. Work with SANC Information and Communication Technology personnel during and after the conclusion of the service provisioning.

14.1.2. Comply with the requirements Scope of work, deliverables, technical specification, timelines, and budget as contracted.

14.1.3. Provide technical guidance / subject matter expertise to SANC staff where required.

14.1.4. Engage with the client project manager relevant to cost, schedule, quality, scope, and other related matters during the contract finalization and during the execution of the assignment.

14.1.5. Produce and implement a Service Level Agreement document in line with ITIL service management.

14.1.6. Provide SANC with all the detailed schematic / architecture documents and related deployment information for the services / solution deployed as well as the BCP/DRP processes, procedures, and other related information.

15. DESIRED CONFIDENTIALITY TERMS AND CONDITIONS

15.1. The successful bidder should strictly treat all SANC information with a high degree of confidentiality.

15.2. The SANC's information should not be provided by any means to a third party.

16. EVALUATION CRITERIA

16.1. Bids will be evaluated in three (3) steps (Mandatory and Administrative Compliance, Functionality and Price and Specific Goals). The following qualifying criteria will be used:

16.1.1. STEP 1: MANDATORY AND ADMINISTRATIVE COMPLIANCE

Document that must be submitted	Non-compliance with items against which a "YES" is denoted shall result in disqualification	
Invitation to Bid Document	YES	Complete in full and sign the supplied pro forma document
Tax Status	YES	i. Proof of Registration on the Central Supplier Database. ii. The CSD verification outcome will take precedence.
Bidder's Disclosure	YES	Complete in full and sign the supplied pro forma document
Preference Point Claim Form	NO	i. Non-submission of Preference Point Claim Form will lead to a zero (0) score on special goals. ii. Proof of Specific goals Ownership and verification will be confirmed using the following documents namely: ✓ CIPC documents, ✓ valid copy of B-BBEE certificate, ✓ copy of Identity document, or ✓ medical report for disability ownership NB: Failure to attach proof, the tenderer will be allocated 0 points on specific goals
Non-Compulsory Briefing Session	NO	The non-compulsory briefing session will be held as follows: Date: 05 June 2022 Time: 14h00 Venue: Microsoft Platform Please click on the link below to logon: Click here to join the meeting Meeting ID: 394 474 160 177 Passcode: 8CNVkW
Written price quotation	YES	Submit a detailed written price quotation

Document that must be submitted	Non-compliance with items against which a “YES” is denoted shall result in disqualification	
Partner Certificate/ Letter	YES	Submit a partner certificate or letter from SAGE as a Business Partner of Finance or Human Resources.

16.1.2. **STEP 2: FUNCTIONALITY:**

16.1.2.1. Any proposed bid which does not meet a minimum threshold of **70 points out of 100 points** will not be considered further.

Description of Evaluation and Evidence Required	Weight
1. Experience of Technical Team lead in the relevant field (SAGE 300 Human Resources software solution/Consultant) 1.1. Provide detailed CVs of the technical team lead: <ul style="list-style-type: none"> ✓ Experience of proposed team member 0 to 2 years = 0 ✓ Experience of proposed team member 3 to 4 years = 5 ✓ Experience of proposed team member 5 years and above = 15 	15
2. Experience of Technical Team in the relevant field (SAGE 300 Financial Management software solution/Consultant) 2.1. Provide detailed CVs of the technical team: <ul style="list-style-type: none"> ✓ Experience of proposed team member 0 to 2 years = 0 ✓ Experience of proposed team member 3 to 4 years = 5 ✓ Experience of proposed team member 5 years and above = 15 	15
3. Experience of Account/Project Manager (ICT project implementation) 3.1. Provide detailed CVs of the Account/Project Manager: <ul style="list-style-type: none"> ✓ Experience of proposed team member 0 to 2 years = 0 ✓ Experience of proposed team member 3 to 4 years = 5 ✓ Experience of proposed team member 5 years and above = 10 	10

Description of Evaluation and Evidence Required	Weight
4. Experience in implementing Finance (Including SCM) and Human Resources modules of SAGE 300 4.1. Attach 3 or more reference letters of SAGE 300 services with contact details: <ul style="list-style-type: none"> ✓ Zero (0) to one (1) reference letter = 0 ✓ Two reference letters (2) letters = 10 ✓ Three (3) reference letters and above = 15 	15
5. Compliance with the Scope of Work <ul style="list-style-type: none"> ✓ Does not compliance with all the requirements of the scope = 0 ✓ Compliance with part of the requirements of the scope = 15 ✓ Compliance with all requirements of the scope = 25 <p>(NB: The service provider is required to complete the provided SAGE 300 Solution checklist – Annexure A)</p>	25
6. Full compliance of the solution to technical specification <ul style="list-style-type: none"> ✓ Does not compliance with all the technical specifications = 0 ✓ Compliance with part of the technical specifications = 10 ✓ Compliance with all requirements of the technical specifications = 20 	20
TOTAL POINTS	100

16.1.3. STEP 3 - EVALUATION ON PRICE AND SPECIFIC GOALS:

a) Price Calculations

The following formula must be used to calculate points out of 80 for price in respect of an invitation for a tender with a rand value from R 2000.00 to or below R50 millions inclusive of all applicable taxes:

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid or offer under consideration

P_{min} = Price of lowest acceptable bid or offer.

b) Allocation of Preference Points Based on Specific Goals.

The South African Nursing Council tenders will be evaluated on the following specific goals premised on addressing the legacy of apartheid's historical injustices, with a consideration on the following categories (of Historically Disadvantaged People - HDP) using race, gender, youth, and people with disability.

A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender. The points scored for the specific goal must be added to the points for price and the total must be rounded off to the nearest two decimal places. Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

Preferential points will be allocated as per table below:

Specific goal	80/20 Preference Point system
Black Ownership	8
Black Women Ownership	4
Black Youth Ownership	4
Disability Ownership	4
Total Points allocated to Specific Goals	20

Black Ownership points will be awarded to a Tenderer who has a 51% or more black ownership. Black ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for black ownership will be awarded as follows:

Black Ownership	80/20 Preference Point system
Tenderers who have 100% black ownership	8
Tenderers who have 51% to 99% black ownership	5
Tenderer who has less than 51% black ownership	0

Black women ownership points will be awarded to a Tenderer who has a 30% or more black women ownership. Black women ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for black women ownership will be awarded as follows:

Black Women Ownership	80/20 Preference Point system
Tenderers who have 100% black women ownership	4

Black Women Ownership	80/20 Preference Point system
Tenderers who have 30% to 99% black women ownership	2
Tenderers who have less than 30% black women ownership	0

Black youth ownership points will be awarded to a Tenderer who has 30% or more black youth ownership. Black youth ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for black youth ownership will be awarded as follows:

Black Youth Ownership	80/20 Preference Point system
Tenderers who have 100% black youth ownership	4
Tenderers who have 30% to 99% black youth ownership	2
Tenderers who have less than 30% black youth ownership	0

Disability Ownership points will be awarded to a Tenderer who has 20% or more disability ownership owners. Disability ownership will be determined by the % of the enterprise owned by such a person or by the % of shares owned by members who are actively involved in the day-to-day activities of the company or enterprise.

Preferential points for disability ownership will be awarded as follows:

Disability Ownership	80/20 Preference Point system
Tenderers who have 20% or more owners with disability	4
Tenderers who have less than 20% owners with disability	2
Tenderers who have 0% owners with disability	0

PRICE SCHEDULE- FIRM PRICES (PURCHASES)

ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

NAME OF BIDDER _____	BID NUMBER: <u>SCM 11/2023/SANC.</u>
CLOSING TIME <u>12:00</u>	CLOSING DATE: <u>26 JUNE 2023</u>

TABLE 1: PROJECT IMPLEMENTATION ONCE-OFF COSTS

DESCRIPTION	COST PRICE (VAT EXCLUSIVE)	TOTAL PRICE (VAT INCLUSIVE)
1. Provision of all Software licenses (Fixed for year one) – list all software.	R	R
2. Installation and configuration of the following modules:		
2.1. Accounting capabilities	R	R
2.2. Tax management capabilities	R	R
2.3. Asset management capabilities	R	R
2.4. Supplier database	R	R
2.5. Procurement	R	R
2.6. Contract management	R	R
2.7. Personnel management	R	R
2.8. Performance management	R	R
2.9. Organisational design	R	R
2.10. Labour relations/employee relations	R	R
2.11. Employee self-service (ESS/MSS)	R	R
2.12. Talent management (training and development, and succession planning)	R	R
2.13. Leave management	R	R
2.14. Payroll	R	R

DESCRIPTION	COST PRICE (VAT EXCLUSIVE)	TOTAL PRICE (VAT INCLUSIVE)
3. Training	R	R
4. Migration of Data	R	R
5. Other costs	R	R
TOTAL (VAT INCLUSIVE)	R	R

TABLE 2: ANNUAL LICENSE RENEWAL

DESCRIPTION	PERIOD	TOTAL PRICE (VAT INCLUSIVE)
Five-year annual license renewal (Software Assurance) cost. NB: Annual license for year 1 must be included under once off implementation costs in table 1.	YEAR 2	R
	YEAR 3	R
	YEAR 4	R
	YEAR 5	R
TOTAL (VAT INCLUSIVE)	R	

TABLE 3: SUPPORT AND MAINTENANCE

DESCRIPTION	PERIOD	HOURS (INDICATIVE)	HOURLY RATE (VAT EXCLUSIVE)	TOTAL PRICE (VAT INCLUSIVE)
Five-year comprehensive support and maintenance agreement cost (all travel, consumables and other incidental costs included)	YEAR 1	1	R	R
	YEAR 2	1	R	R
	YEAR 3	1	R	R
	YEAR 4	1	R	R
	YEAR 5	1	R	R
TOTAL (VAT INCLUSIVE)				R

NB: Support and maintenance will be provided on a consumption basis.

TABLE 4: PROJECT TOTAL COSTS

DESCRIPTION	TOTAL PRICE (VAT INCLUSIVE)
TOTAL ON TABLE 1	R
TOTAL ON TABLE 2	R
TOTAL ON TABLE 3	R
GRAND TOTAL (VAT INCLUSIVE)	R

Required by (End-User):

Required at (Address):

ICT Department
Cecilia Makiwane Building
602 Pretorius Street
Arcadia, Pretorius 0083

Brand and model (if applicable):

.....

Country of origin (if applicable):

.....

Guarantee period (if applicable):

.....

Does the offer comply with the specification? ***Mark the relevant block with an X**

☐ Yes

☐ No

☐ N/A

If not to specification, indicate deviation(s)

.....

How long it will take for the bidder to deliver goods/services after receipt of a purchase order?
(Only firm delivery period will be considered):

.....

DECLARATION BY THE BIDDER:

Iconfirm that the information furnished is correct and true.

I accept that the South African Nursing Council may act against me should this declaration prove to be false.

Name of Bidder:.....Position:.....

Signature:.....Date:.....

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 000 000.00 (all applicable taxes included).

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

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

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

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

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

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

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

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation.

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20

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

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 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 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 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 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 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	Description of the goals	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Black Ownership	Tenderers who have 100% black ownership	8	
	Tenderers who have 51% to 99% black ownership	5	
	Tenderers who have less than 51% black ownership	0	
Black Women Ownership	Tenderers who have 100% black women ownership	4	
	Tenderers who have 30% to 99% black women ownership	2	
	Tenderers who have less than 30% black women ownership	0	
Black Youth Ownership	Tenderers who have 100% black youth ownership	4	
	Tenderers who have 30% to 99% black youth ownership	2	
	Tenderers who have less than 30% black youth ownership	0	

The specific goals allocated points in terms of this tender	Description of the goals	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Disability Ownership	Tenderers who have 20% or more owners with disability	4	
	Tenderers who have less than 20% owners with disability	2	
	Tenderers who have 0% owners with disability	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses, or damages it has incurred or suffered as a result of that person's conduct;

- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders, and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:
.....

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 interest¹ in the enterprise,
employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

- 2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

- 2.2.1 If so, furnish particulars:

.....
.....

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

- 2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

¹ 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.

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 consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements, or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

² 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.

ANNEXURE A -SAGE 300 ERP TERMS OF REFERENCE (TOR) CHECK LIST

NB: PLEASE SPECIFY COMPLY/ NOT COMPLY ON THIS DOCUMENT

SCOPE OF WORK	COMPLY	NOT COMPLY
ACCOUNTING CAPABILITIES		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
TAX MANAGEMENT CAPABILITIES		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
ASSET MANAGEMENT CAPABILITIES		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
SUPPLIER DATABASE		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
PROCUREMENT		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
CONTRACT MANAGEMENT		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
PERSONNEL MANAGEMENT		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
PERFORMANCE MANAGEMENT		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
ORGANISATIONAL DESIGN		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
LABOUR RELATIONS/EMPLOYEE RELATIONS		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
EMPLOYEE SELF-SERVICE (ESS/MSS)		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
TALENT MANAGEMENT (TRAINING AND DEVELOPMENT, AND SUCCESSION PLANNING)		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		
<ul style="list-style-type: none"> LEAVE MANAGEMENT Provide of all applicable features for the module Provide of all applicable features for the module 		
PAYROLL		
<ul style="list-style-type: none"> Provide of all applicable features for the module 		

OTHER REQUIREMENTS		
<ul style="list-style-type: none"> • Provide of all applicable features 		
WORKFLOW		
<ul style="list-style-type: none"> • Provide all applicable features 		
OTHER REQUIREMENTS		
<ul style="list-style-type: none"> • Provide all applicable features 		
APPROPRIATE INFORMATION SECURITY		
FUNCTIONALITIES TO INCLUDE:		
<ul style="list-style-type: none"> • Provide of all applicable features 		
TRAINING		
<ul style="list-style-type: none"> • Provide training to SANC employees 		