



INVITATION FOR PROPOSALS

APPOINTMENT OF A SERVICE PROVIDER TO IMPLEMENT ENTERPRISE CONTENT MANAGEMENT SYSTEM (FOR AN ESTIMATED DURATION OF 4 MONTHS), SUPPLY LICENCES AND PROVIDE MAINTENANCE SUPPORT (1 YEAR) FOR THE DEPARTMENT OF HUMAN SETTLEMENTS.

BID NUMBER	ZNB 1136/2014HSE
CLOSING DATE	09 JANUARY 2015 @ 11H00
BID BOX NO.	14 (SITUATED AT GROUND FLOOR, SAMORA HOUSE, 2 SAMORA MACHEL STREET, DURBAN)
COMPULSORY BRIEFING SESSION DATE	22 DECEMBER 2014 – <u>NO DOCUMENT WILL BE ISSUED ON OR AFTER BRIEFING SESSION DAY</u>
BRIEFING SESSION TIME	10H00
BRIEFING SESSION VENUE	4TH FLOOR MAIN BOARDROOM, 02 SAMORA MACHEL STREET, SAMORA HOUSE, DURBAN.
TECHNICAL ENQUIRIES	MR THANSEN SINGH 031 336 5285
BID ENQUIRIES	MR S. MTHEMBU 031 336 5169/ MRS R. GAFOOR 031 336 5142/ MR. N. E. NGWENYA 031 3365157

The Department of Human Settlements hereby invites proposals from suitably qualified and experienced service providers with the requisite capacity for appointment as a service provider to implement Enterprise Content Management System (for an estimated duration of 4 months), supply licences and provide maintenance support (1 year) for the Department of Human Settlements.

Documents will be made available as from **05 December 2014 till 19 December 2014**. A non-refundable cash fee of R300-00 will be charged for the bid document. Payment must be made at cashiers office 1st floor, Samora House, 2 Samora Machel Street Durban, from 8h00 – 15h00. A receipt must be produced to the bid section at 5th floor, room 518 for issue of a bid document. **No documents will be issued after 15h30 on 19 December 2014.**

The bidder or a person who is directly employed by the bidder and is suitably qualified and experienced to comprehend the implications of the work involved must represent the bidder at the compulsory briefing session.

Bidders must furnish original bid documents at the briefing session venue as section J will be endorsed by the Departmental official.

The Department of Human Settlements would like to enter into a contract with a reputable and accredited Information Technology Specialist Company with a requisite capacity to supply licenses; implementation of Enterprise Content Management System and provide annual maintenance support.

The KwaZulu Natal Department of Human Settlements is a Microsoft based environment. They are currently filing their physical documents manually and huge intellectual properties in terms of electronic documents are not in a central repository but rather sitting in individual computers or laptops. In this regard, proposals are hereby invited from interested Service Providers capable of delivering an all-encompassing, web-based **Integrated Electronic Document and Records Management software and services.**

The integrated system must offer suitable functionality for the following:

- Electronic Records Management

- and Document and other content Management

The solution must have the capabilities to seamlessly handle other content types as KZNHS's requirements develop in the future. The solution must have the flexibility and portability to ensure ease of transition to be hosted on the "shared service" platform. Documents therefore need to be stored in its native format and not in a proprietary format.

SCOPE

The following tasks will have to be carried out for the identified directorates.

- Assess and evaluate the current state of email handling, records management and content management throughout KZNHS.
- Conduct an information audit in order to identify classifications of documents and emails that are created, received and distributed by the department internally and externally. Recommend where necessary suitable amendments to achieve departmental uniformity and conformity
- Conduct an audit of the department's registry in order to ensure that the department is able to make use of its registry function to meet its information needs.
- Analyse the current IT infrastructure to identify any existing capacity for deploying the solution prior to recommending an investment in infrastructure.
- Identify core documents and core document flows within the department.
- Develop a taxonomy aligned to core document flows within the organisation, whilst also allowing for future expansion. The taxonomy must also include a security framework allowing for management of access to different documents and taxonomies.
- Develop a technical design for the solution.
- Design the equivalent of a centralised electronic registry based on the departments existing file plan.
- Identify functional and technical requirements by analysing the departments file plan, procedures, processes and information gathered from workshop sessions and individual interviews.
- Assess and evaluate the various document formats used to create documents and records in the department, and recommend a standard set of formats for use with the electronic document repository
- Perform an analysis of the environment in which the solution will be deployed and identify key changes that need to be adopted to successfully achieve the objectives detailed above. Develop a change management plan which indicates strategies to effectively manage the changes.
- Develop a detailed project implementation plan with milestones.
- Implement a solution for managing documents the following Directorates at KZN Human Settlements (maximum number of users 100): HR, Office of HOD, Secretariat, Land Legal, IMST, and General Registry. Software licenses must cater for 100 users. Scanning of documents is excluded. The Directorate may be changed by the Department but subject to the maximum of 100 users.
- Deploy an Electronic Enterprise Content Management Solution including the following activities:
 - Creation of users, user group and user permission with secure access control
 - Creation of customized portals
 - Automation of file plan and creation of meta data also applying retention and disposition policies
 - Identifying and creation of workflows and workflow templates
 - Creation of customized reports and audit trails
 - Provide linkages to Microsoft office suite
 - Setup automation scanning facilities.
- Provide technical, training and user procedure manuals for the solution.
- Provide user support for the initial stages of the implementation.
- Provide a skills transfer plan, which will allow application support and enhancement,
- Implement the change management plan

ORAL PRESENTATIONS

- The department, however reserves the right to clarify any information with any bidder regarding the bid
- Bidders who submit a response may be required to give an oral presentation, which may include, but is not limited to, an equipment/service demonstration of their proposal to the department. This

provides an opportunity for the bidder to clarify or elaborate on their proposal. This is a fact finding and explanation session only and does not include negotiation. THE DEPARTMENT shall schedule the time and location of these presentations.

Oral presentations are an option of department and may or may not be conducted. If such presentations are required, then all costs (including Subsistence & Travel / Disbursements) to set up these sessions will be borne by the bidder

The evaluation criteria will be a two stage process. Stage 1 is eligibility criteria with a minimum score of 60% to progress to stage 2. Stage 2 will be evaluated in terms of PPPFA.

1. Bids must be on the official original Bid Document which shall be completed in all respect and all information must be supplied as stipulated on the Bid Document.
2. Bids must be submitted on separate sealed envelope into bid box no. 14 in foyer.
3. The bid number and closing date must be endorsed on the envelope.

STAGE 1 – ELIGIBILITY CRITERIA

IN ADDITION TO ALL REQUIREMENTS A COMPREHENSIVE COMPANY PROFILE MUST BE ATTACHED DETAILING ALL INFORMATION REQUIRED AS PER STAGE 1 OF EVALUATION CRITERIA. FOR PROGRESSION TO STAGE 2, SERVICE PROVIDERS MUST SCORE A MINIMUM OF 60% OF TOTAL POINTS AND PROFILE MUST HAVE TRACEABLE REFERENCES WITH A PROVEN TRACK RECORD. DOCUMENTARY PROOF OF COMPLETED CONTRACTS MUST BE ATTACHED

Key aspect of Eligibility	Basis for points allocation	Score	Max Points
Approach/ Methodology	The approach/methodology that will be used to achieve the objectives listed on “Section N” is clearly defined. Provide supporting documents In respect of above.	Good	13 - 20
	Acceptable (in terms of above)	Fair	9 - 12
	Lacks the appropriate level of experience	Poor	0 – 8
Development Experience	Service provider to possess extensive experience in installation, configuration and support of the tool proposed as well as extensive knowledge and development experience in ECM. Provide supporting documents in respect of above.	Good	19 - 30
	Acceptable (in terms of above)	Fair	13 – 18
	Lacks appropriate, applicable and relevant experience as the developer and business analyst	Poor	0 – 12
Project Plan	Provide a high level project plan that clearly defines deliverables as listed in “Section N”	Good	7 – 10
	Acceptable (in terms of above)	Fair	5 – 6
	Lacks the appropriate level of experience	Poor	0 – 4
Resources	Project team to comprise of trained resources in ECM. Resources to possess extensive knowledge and development experience in ECM. Supporting documents/certificates must be attached.	Good	13 - 20
	Acceptable (in terms of above)	Fair	9 – 12
	Lacks appropriate, applicable and relevant skills	Poor	0 – 8
Economic Viability of the System	Annual support and maintenance <15% of development and implementation cost	Good	13 - 20
	Annual support and maintenance between 15% and 20%	Fair	9 – 12
	Annual support and maintenance >20%	Poor	0 – 8
TOTAL			100

STAGE 2 – 90/10 PREFERENCE POINTS SYSTEM

The 90/10 Preference Points System will be utilized. In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution.