INVITATION FOR PROPOSALS
APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP AND IMPLEMENT AN AUTOMATED LEAVE MANAGEMENT SYSTEM, SUPPLY K2 SOFTWARE FOR AN ESTIMATED PERIOD OF 4 MONTHS AND PROVIDE ANNUAL MAINTENANCE SUPPORT FOR 1 YEAR FOR THE DEPARTMENT OF HUMAN SETTLEMENTS

BID NUMBER	**ZNB 1137/2014HSE**
CLOSING DATE	**12 JANUARY 2015 @ 11H00**
BID BOX NO.	**15 (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	**13H00**
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 an Automated Leave Management System, supply K2 software for an estimated period of 4 months and provide annual maintenance support for 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 necessary software, develop and implement an automated leave application system.

The KwaZulu-Natal Department of Human Settlement is embarking on a project to automate the leave application process based on a Business Process Management (BPM) solution.

An analysis of the business needs was conducted among Human Settlement Management during the development of the IT Strategy. A common business requirement was the need to automate business processes, among them HR process. The Leave Process has been identified for automation due to the many challenges in managing the applications.

The current manual process of leave application and management has been identified to be both inefficient and prone to abuse and possible fraud. A relatively routine process, like leave application was found to have lag times that could be considerably improved by automating the processes. Further risks related to the possibility of leave forms not being sent to HR either intentionally resulting in leave fraud or unintentionally due to forms going astray due to the series of steps and number of people involved in the process.

The KZN Department of Human Settlement has identified a business need to automate their leave process. An analysis has been conducted of their business environment and the associated business processes to determine the complexity of the processes and possible integration requirements. An evaluation was done on various BPM products to identify the most suitable product for their environment. The most suitable product, to meet their business needs both from a cost and functionality perspective is **K2.**

SCOPE
The following activities are required for the Leave Application process
- Re-engineering of current processes;
- Analysis;
- Compilation of User Requirements Documentation and associated documentation;
- Development and implementation of Leave Process using K2 Blackpearl Application, including reporting;
- Integration to Active Directory, Exchange, SMS Gateway and other operational systems
- Deployment on departments production environment;
- Version Control;
- Quality assurance
- Change Control
- Creation of Training Manuals;
- User training;
- Post implementation support and maintenance for 1 year;
- Project Management

FUNCTIONALITY

 The automated leave process must have the following functionality

AUTOMATION
- The analysis is for the automation of a leave process. The leave process will import data from Persal via downloads.
- The solution must have the ability to correspond via email and send SMS's to whomever applicable
- Audit trails
- Web enabled; on Departments Intranet
- Upload of Persal Data
- Integration to future ECM system
- Security and authentication
- SLA tracking
- Seamless integration with Active Directory

IMPLEMENTATION OF LEAVE POLICY AND BUSINESS RULES
a) All aspects of the Leave policy must be implemented as per DPSA requirements, including partial hour leave application.
b) Application for all types of leave
c) Amendment to applied leave
d) Cancellation of leave
e) Upload of attachments
f) Escalations if task is not attended to
g) Auto-populate basic user data
h) Auto-calculate leave balances
i) Relevant alerts at different steps in the process via email and SMS
j) Full audit trail

k) Various reports and dashboards
l) Administration module
m) SMS integration
n) Leave history
o) Service levels at each step
p) Document management integration
q) Calendar with leave applications auto populated with drill down functionality to details of leave
r) Kiosk facilities at some locations
s) Any additional requirements identified that enhances the functionality and ease of use of the system and/or that may arise as a result of policy changes.

ORAL PRESENTATIONS
The department, however reserves the right to clarify any information with any bidder regarding their response.

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. 15 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

CVS OF RESOURCES MUST BE PROVIDED INDICATING THE NUMBER OF YEARS OF EXPERIENCE IN EACH CATEGORY.

Key aspect of Eligibility	Basis for points allocation	Score	Max Points
Qualification	K2 developers and business analyst must possess a relevant Degree/diploma/certificate in IT, Information Systems or Computer Science with software/systems development courses	Good	7 – 10
	Acceptable (in terms of above)	Fair	5 – 6
	No relevant qualification	Poor	0 – 4
K2 Development experience	Developers must have experience in development using K2 Blackpearl	Good	16 – 25
	Acceptable (in terms of above)	Fair	11 – 15
	Lacks appropriate, applicable and relevant experience as the developer	Poor	0 – 10
Dot.net, SQL server	Developers must have experience in development using dotnet and SQL server	Good	10 – 15

experience	Acceptable (in terms of above)	Fair	7 – 9
	Lacks appropriate, applicable and relevant experience as the developer	Poor	0 – 6
Business Analysis Experience	Business analyst must possess experience in Business process management and in using modeling tools, e.g. Visio	Good	16 – 25
	Acceptable (in terms of above)	Fair	11 – 15
	Lacks appropriate, applicable and relevant experience as the analyst	Poor	0 – 10
Project Management experience	Experience in project management using PRINCE 2 and in using MS projects	Good	10 – 15
	Acceptable (in terms of the above)	Fair	7 – 9
	Project plan lacks standard information	Poor	0 – 6
References	Bidders must provide at least 2 customer references for similar projects (automation of business process using business process management (BPM)	Good	7 – 10
	Acceptable (in terms of the above)	Fair	1 – 6
	No references provided	Poor	0
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.