



Request for Proposal: Establishment of an IT system Tender

Integritas, 7 Zulberg Close, Bruma Lake, 2198, Johannesburg P.O. Box 59875, Kengray, 2100

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www.thehopefactory.co.za

The Hope Factory (Association Incorporated Under Section 21) Registration No. 2004/006858/08
EJ Carelse (Chairman), NA Wade, A Jagga, CC Mulder, EA Zambonini, NAN Mehlomakulu, M Naidoo (Company Secretary)

Introduction

The Hope Factory provides training, job creation and empowerment opportunities for the unemployed. As a growing organisation, IT systems need to be implemented, as outlined in the document.

Service Required

The Hope Factory is seeking to appoint a service provider to develop and support, information systems and technology that will add value to its ED and Sales service offering to clients as well as from an administrative view point within the company.

There are 7 areas of focus for the new system:

1. Sales tracking and monitoring system: A centralized server with a database system where all sales activities are captured, from first enquiry through to delivery stage. This system must have input screens accessible to all role players in the sales lifecycle (sales, production) and must ultimately be able to produce management information reports like:
 - i. Tracking sale of products
 - ii. Raw material requirements per orders.
 - iii. Raw materials used on the manufacturing of the products
 - iv. Best selling products
 - v. Worst selling products
2. A customer relationship management system (sales clients): This system will be linked to the sales tracking system and must enable us to:
 - a. Create a "file" for each customer with their information
 - b. Track what products each customer has bought over a certain period of time
 - c. Provide reports on best clients / worst clients
 - d. Record various types of information such as what gift was given to which funder in which year!
3. Client relationship management system (ED Funders): This system will be used to keep record of all ED funders. The management information output required will include:
 - a. Each funder to have a "file" so that we can pull up their information, photos and other
 - b. Track funder's year end
 - c. Track when funder is due to invest further funds
 - d. Record various types of information such as what gift was given to which funder in which year!

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4. Version of CRM for our HF learners and graduates:

- a. Learner database: A system that stores information on the Learners that are entering The Hope Factory in Phase One that can do the following:
 - i. Track the learners from Phase 1 to after they graduate and either move into Phase 2 or other employment and/or into Phase 3 and become entrepreneurs.
 - ii. Photos and stories of each learner, graduate, entrepreneur as they develop over time.
 - iii. All follow up interviews/visits to be captured on this system for future reference.
 - iv. Information for funders' rating agencies that provide proof for ED points. (pull reports)
 - v. Information for public relations and marketing purposes
- b. Part-time/contractual employee database: A comprehensive database of all graduates joining the Job Creation programme. This system must be able to record:
 - i. Days of attendance
 - ii. Employee – eg skills levels in different areas
 - iii. Wage level – to be linked to set processes in this regard
 - iv. Employee information : contact details etc
 - v. Performance management input.
 - vi. Time sheet capturing per job number.

5) Full time employee database: A comprehensive database of all full time HF employees. This system must be able to record/process:

- vii. Employee details including contact details, educational records, ID, date of appointment.
- viii. Performance assessments.
- ix. Skills matrix.
- x. Disciplinary records.
- xi. Leave input and credits

6. Stock management system. A comprehensive database to manage, control, issue and request stock and raw material. This database to include:

- a. A full database of all raw material, all broken down into different categories with drop down functionality to drill down per category to subcategory, details, descriptions etc.
- b. A very simple stock in/stock out input screen by which stock of raw materials is brought on book and issued per job.
- c. All stock of raw materials to be linked to valuation based on invoices when stock is received. This valuation to be able to record all purchases and provide an average value of all raw materials stock.
- d. An online raw materials stock request system, accessible to all employees, by which stock can be requested from store room.

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- e. Real time stock on hand information as well as built in alerts for minimum stock levels on certain items.
- f. Reporting functionality to supply management info on total raw material used per job number as well as the value of this material.

7. Manufacturing cost system: This system must be able to pull information from both the sales system, HR system and stock system to supply the following information:
- a. Determine the actual raw material and man hours spent per job number.
 - b. During the costing process, be able to pull the raw material cost per item used in the manufacturing process to determine the price of products for sale.

This strategy is seen by The Hope Factory management as top priority and we are therefore ready to move forward as soon as possible. We would also appreciate time spent on training staff regarding these new systems.

It is important to note that most staff are not very technical when it comes to IT systems. The system therefore needs to be easy to use, and fast. It will not be worth the man hours if this process is too cumbersome.

Training and after sales support will be vital. This will need to be provided in JHB and PE.

The RFP Process

The tender process will be undertaken as follows:

- Service providers are requested to submit a formal proposal.
- A project team appointed by THE HOPE FACTORY will review the Service Provider Proposals against a set of pre-defined criteria and rate the candidates on their ability to satisfy the requirements.
- **Prospective Service Providers will be required to attend a compulsory briefing session on Friday, 10h00 – 12h00, 07 May 2010 7 Zulberg Close, Bruma Lake, prospective service providers who do not attend this briefing session will not be permitted to respond to this RFP – any such submissions will be automatically disqualified as part of the evaluation process. During the briefing session additional information will be given to prospective service providers, who will be given the opportunity to ask questions.**

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- Prospective service providers may be required to do a 30 minute presentation to the project team and answer questions on their proposals.
- THE HOPE FACTORY will select a suitably qualified service provider. THE HOPE FACTORY and the successful service provider will then negotiate and agree a final contract for delivery of the proposed services.
- Prospective Service Providers are requested to submit a formal proposal in the format requested and as documented in Annexure A Response Sheet, Annexure B Pricing Response Sheet, Annexure C Bidder Declaration Sheet,

Whilst THE HOPE FACTORY is issuing this RFP in good faith, it reserves the right to cancel or delay the selection process at any time without providing reasons therefore, and reserves the right not to select any of the respondents to this RFP.

Proposals

Formal proposals should be sent to the following address:

Mncedi Mabona
c/o The South African Institute of Chartered Accountants
Integritas, 7 Zulberg Close
Bruma Lake
2198

The prospective Service Provider must submit four (4) paper copies and one (1) electronic copy of the proposal. Documents submitted by prospective Service Providers will not be returned. E-mail or fax responses are **NOT** acceptable.

PROPOSALS SHOULD REACH SAICA BY 12H00 ON FRIDAY, 21 MAY 2010

No extensions for submission of the proposal will be granted. **Late submissions, no matter what the cause, will be automatically disqualified.**

Any attempt to gain information on the RFP content and process in a manner deemed to be unfair or disadvantageous to other respondents or any attempt to influence the outcome of the response evaluation will result in immediate disqualification from the RFP process.

All costs associated with any aspect of developing a response to this RFP, including but not limited to collection and delivery, are for the respondent's account.

Assessment of Proposals

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The proposals will be evaluated by a project team appointed by The Hope Factory. This team may include external experts.

Unsuccessful respondents will be notified by e-mail and The Hope Factory reserves the right to reselect prospective service providers should negotiations with any service provider(s) originally selected prove unsatisfactory or non-productive. A contract with the successful service provider(s) will only be deemed to be concluded when reduced to writing in a formal contract signed by the designated responsible persons of both parties.

Prospective service providers are reminded that their submission and costing will form an integral part of the evaluation, selection and contracting process and will therefore be carried through to the contracting stage. The Hope Factory has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

Price is an important component of the evaluation; however, it will not be the most important aspect. The proposal will be judged in terms of all the criteria listed in the next section and the value that The Hope Factory will derive from the services provided. The Hope Factory will not necessarily accept the lowest overall pricing.

Evaluation of the responses will be done in four major categories, based on predetermined weightings. The following defines each major category that will be used for the evaluation of the responses.

1. **DELIVERY AND SERVICES:** Evaluation based on:

- The quality of the response submitted,
- Technological components of the proposed solution, including:
 - Usability: ease of navigation, etc.
 - Accessibility: Software and hardware requirements - State whether trainee must have the latest Macromedia Flash plug-in, etc. as well as graphics cards, sound cards, etc.

Comprises 60% of the overall score.

2. **PRICING:** Ranking of the pricing, estimate of the feasibility and sustainability of service delivery based on the pricing provided. The Hope Factory will not necessarily accept the lowest overall pricing.

Comprises 30% of the overall score.

3. **BEE, HDI, SMME:** The Hope Factory is a signatory to the BEE Charter for the accountancy profession. It also has a procurement policy which is set out on the Hope Factory website (www.thehopefactory.co.za). Compliance with BEE principles as evidenced in a BEE rating will be taken into account by the project team.

Comprises 10% of the overall score.

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PLEASE NOTE:

The following will constitute grounds for immediate disqualification of a submission:

- Incorrect and incomplete submissions, including failure to provide the required statutory and general information
- Late submission of proposals.

Conditions of Tender

Confidentiality

The tender organisation and THE HOPE FACTORY agree to keep the terms of this tender and details of the tender organisation's proposal strictly confidential, including but not limited to any financial information provided, and will not disclose the content thereof to any third party, except as required by law.

Copyright

Copyright of the learning materials, learner guides, facilitator guides and assessment guides will rest solely with THE HOPE FACTORY.

Termination of contract

THE HOPE FACTORY reserves the right, upon 2 (two) weeks written notice to the chosen Service Provider, to terminate the contract during any time and award the contract to an independent third party, due to the Service Provider's non-compliance, either to the agreed service standards or breach of any of the conditions of the contract.

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