ECSA/RFP01/2022
Response template

Replace this page with your own
Cover Page

NOTE THAT BIDDERS ARE REQUIRED TO **WRITE THEIR RESPONSES WITHIN THIS WORD DOCUMENT** USING THE SPACES BETWEEN THE GREEN AND RED LINES AS DEPICTED IN THE EXAMPLE BELOW. HOWEVER, **DO NOT INCLUDE ANY PRICING INFORMATION**. PRICING PROPOSALS MUST BE IN A SEPARATE SEALED ENVELOPE.

Bidder Response:

TABLE OF CONTENTS

[1. COMPULSORY SUBMISSIONS 7](#_Toc101514371)

[2. INFORMATION ABOUT THE BIDDER 8](#_Toc101514372)

[2.1 Bidder's contact person(s) for this proposal 8](#_Toc101514373)

[2.2 About the bidder company 9](#_Toc101514374)

[2.3 About the bidder team 9](#_Toc101514375)

[2.4 Bidder's understanding of the brief 10](#_Toc101514376)

[2.5 Bidder's experience with similar projects 10](#_Toc101514377)

[2.6 Presentations and demonstrations 10](#_Toc101514378)

[2.7 Client references 10](#_Toc101514379)

[2.8 Bidder's terms and conditions, assumptions, riders 11](#_Toc101514380)

[3. THE BIDDER'S PROPOSED SOLUTION 11](#_Toc101514381)

[3.1 Transfer skills to ECSA's in house ICT team 11](#_Toc101514382)

[3.2 Overhaul and extend the ECSA portal 12](#_Toc101514383)

[3.3 Plug the process gaps in the existing system 12](#_Toc101514384)

[3.4 Build and deploy a chatbot on ECSA portal and website 13](#_Toc101514385)

[3.5 Design, build, populate and deploy a data warehouse 14](#_Toc101514386)

[3.6 Develop and deploy reports, visualisations and dashboards 14](#_Toc101514387)

[3.7 Train internal users of the CRM system 15](#_Toc101514388)

[3.8 Ensure data integrity and input validation 15](#_Toc101514389)

[3.9 Verifiable certificates 16](#_Toc101514390)

[3.10 Integrate with PaperTrail DMS 16](#_Toc101514391)

[3.11 Integrate with Sage (Pastel) Evolution ERP 17](#_Toc101514392)

[3.12 Integrate with SHEQsys Quality Management System 17](#_Toc101514393)

[3.13 Integrate with Ocular O!Connect contact centre system 18](#_Toc101514394)

[3.14 Enhance integration with SagePay/Netcash payment gateway 18](#_Toc101514395)

[3.15 Integrate with SMS and WhatsApp 18](#_Toc101514396)

[3.16 Integrate with Social Media Platforms 19](#_Toc101514397)

[3.17 Advanced search options on ECSA portal 19](#_Toc101514398)

[3.18 Compliance with POPIA 20](#_Toc101514399)

[3.19 System performance 20](#_Toc101514400)

[3.20 System security 20](#_Toc101514401)

[3.21 Summary of Deliverables 21](#_Toc101514402)

[4. BIDDER's PLAN OF APPROACH 22](#_Toc101514403)

[4.1 A fixed price for a fixed scope of work 22](#_Toc101514404)

[4.2 Dealing with scope change 22](#_Toc101514405)

[4.3 Onboarding the team and building business knowledge 22](#_Toc101514406)

[4.4 Software development approach 23](#_Toc101514407)

[4.5 Project governance 24](#_Toc101514408)

[4.6 Project timelines 25](#_Toc101514409)

[APPENDIX: OPTIONAL FURTHER INFORMATION FROM BIDDER 26](#_Toc101514410)

THE SUCCESSFUL BIDDER

| (Please do not change the text in this column)**The successful bidder will be one that:** | Bidder complies?Yes/ No/ Partially | Bidder's brief comments on compliance |
| --- | --- | --- |
| 1. Can demonstrate a credible track record in CRM customisation, business process automation, data warehouse design, business intelligence, and systems integration – using Microsoft Dynamics 365 CRM, Power Apps Portals, Sage Evolution, Power Automate, Power Virtual Agents, and Power BI.
 |  |  |
| 1. Provides ECSA with at least two reference clients who are willing to meet with us and answer questions regarding the bidder’s performance on a similar project.
 |  | Names of two or more reference clients: |
| 1. Is a certified Microsoft Silver or Gold partner with competency in Dynamics 365 CRM
 |  |  |
| 1. Has a pool of qualified ICT professionals with the following skillsthat can be deployed full time or part time as appropriate, to deliver ECSA's strategically important project.
 |  |  |
| * 1. Dynamics 365 CRM configuration and customisation. This is where the largest volume of work lies.
 |  |  |
| * 1. Microsoft Power Apps Portals (formerly Dynamics 365 Portals) development.
 |  |  |
| * 1. Software testing, preferably with automated testing experience.
 |  |  |
| * 1. Project management, agile or waterfall or a blend of these as preferred by the bidder.
 |  |  |
| * 1. Data warehouse: design, build, populate and deploy.
 |  |  |
| * 1. Microsoft Power BI report and dashboard development.
 |  |  |
| * 1. Chatbot development, preferably using Microsoft Power Virtual Agents.
 |  |  |
| * 1. Systems integration between Dynamics 365 CRM, Sage Evolution, PaperTrail, SHEQsys, O!Connect, and Power Apps Portal using APIs, Transact-SQL, C#, JavaScript, Power Automate and Fetch XML.
 |  |  |
| * 1. Robotic Process Automation (using Microsoft Power Automate and Power Automate for desktop) to integrate modules where API or custom integration is not feasible.
 |  |  |
| * 1. Azure Data Factory for data warehouse deployment
 |  |  |
| 1. Will allow ECSA to assess the expertise and fit of submitted resources and reject a resource that does not meet ECSA's standard.
 |  |  |
| 1. Is willing and able to commit a core team of *named* individuals to our project for the contract term[[1]](#footnote-2). *See footnote*.
 |  |  |
| 1. Is willing to embed ECSA's analyst-programmer and software developer into their developer team.
 |  |  |
| 1. Proposes a SMART plan to transfer relevant skills to ECSA ICT and business personnel so that they can support and maintain the core systems in house.
 |  |  |
| 1. Is willing to share risk by quoting a fixed price for a fixed scope of work.
 |  |  |
| 1. Agrees in principle to ECSA retaining a percentage of fees for a specified period, to protect itself from the partner's failure to complete functionality. Details for negotiation.
 |  |  |
| 1. Is willing to undertake warranty work in a timely manner and at its own expense should it deliver a defective deliverable that is not the fault of ECSA, or to share warranty work costs where there is shared responsibility for the fault.
 |  |  |
| 1. Is willing (at ECSA's request) to place its full-time resources on site, embedded within ECSA business units. This is to enhance teamwork, learning and communication. Currently, staff are working in hybrid "work-from-home-or-office" mode.
 |  |  |
| 1. Is willing to sign a non-disclosure agreement, POPIA operator agreement, and service level agreement with ECSA.
 |  |  |
| 1. Offers a cogent plan to onboard resources, acclimatise them, and quickly grow their business process knowledge.
 |  |  |
| 1. Upholds a set of core values that are in harmony with those of ECSA.
 |  |  |
| 1. Will work constructively, fairly, and respectfully with ECSA to quickly resolve any misunderstandings or disagreements that may arise.
 |  |  |
| 1. Meets ECSA's supply chain requirements and passes the 80% thresholds in stages 2 and 3.
 |  |  |
| 1. Achieves the highest score in stage 4: Financial and BBBEE evaluation.
 |  |  |

# 1. COMPULSORY SUBMISSIONS

Submissions from bidders **must contain 4 bound volumes** and a **memory stick** containing identical documents in PDF format:

Kindly indicate in the boxes below whether you comply and make any clarifying comments.

1. **This response template document**. Bidders must *strictly* usethis Word-format template. Please do NOT change the order of the headings. This is to speed up ECSA's evaluation of bidder proposals by making them easier to compare side by side.

This volume MUST NOT include any financial information.

|  |  |
| --- | --- |
| Complies? Yes/No/Partial | Bidder comments (if any) |
| Type your response here | Type your response here |

1. **The separate financial proposal**. Provide a fixed price for the project, plus the day rates for the roles to be assigned to the project. ECSA will use these day rates to calculate the cost of a scope changes. This proposal must be delivered in a sealed envelope, separate from the RFP response document.

|  |  |
| --- | --- |
| Complies? Yes/No/Partial | Bidder comments (if any) |
| Type your response here | Type your response here |

1. **Other SCM documents**

Please supply the following documents, *in this sequence*, in a separately bound volume.

* SBD1
* SBD 2 Tax clearance
* SBD 4 form declaration of interest
* SBD 6.1 form preferential points claimed
* SBD 8 form past SCM practices
* SBD 9 form declaration of determination-rigging​
* BBBEE certificate
* Bank account confirmation letter
* SARS tax clearance

|  |  |
| --- | --- |
| Complies? Yes/No/Partial | Bidder comments (if any) |
| Type your response here | Type your response here |

1. **CVs of the team** that will be assigned to the project. Include copies of qualifications and certifications that demonstrate their capacity to deliver. These do not need to be certified copies – ECSA may ask for certified copies during the evaluation process.

|  |  |
| --- | --- |
| Complies? Yes/No/Partial | Bidder comments (if any) |
| Type your response here | Type your response here |

# 2. INFORMATION ABOUT THE BIDDER

*Any information that the bidder believes is important but does not belong into one of the headings below, may be included in the Appendix at the end of this document.*

## 2.1 Bidder's contact person(s) for this proposal

List the names and contact details of bidder personnel that ECSA may contact.

Bidder Response:

## 2.2 About the bidder company

Bidders should use this section to tell ECSA about their company and why the company is the right one to deliver this project. Please summarise your company history, philosophy, and value proposition.

Does your company adhere to a set of core values? What are they? How do you promote them? How do you ensure that your people abide by those values?

Bidder Response:

## 2.3 About the bidder team

Bidders should indicate the **roles** they propose from the project team, and the name(s) of the people you commit to the project, assuming a start date between 01 July and 01 August 2022.

Remember that ECSA wants you to name the team that will actually perform the work. ECSA reserves the right to assess proposed team members and accept or reject them based on ECSA's own criteria.

A short bio should be included below. Full CVs and certificate copies should be included in a separate document.

Bidder Response:

## 2.4 Bidder's understanding of the brief

Bidder Response:

## 2.5 Bidder's experience with similar projects

Bidder Response:

## 2.6 Presentations and demonstrations

Bidder proposals will be evaluated in 4 stages. More details are provided in RFP section 8, EVALUATION CRITERIA.

During stage 3, qualifying bidders will be asked to present their credentials and demonstrate their capabilities by demo'ing similar systems they have developed.

Please describe briefly the demonstrations and presentations you plan to give during stage 3.

Bidder Response:

## 2.7 Client references

Please list two or more reference clients who are willing to meet (remotely) with ECSA and comment honestly on your company in relation to relevant work performed for them recently.

Bidder Response:

## 2.8 Bidder's terms and conditions, assumptions, riders

ECSA will negotiate a service level agreement with the successful bidder. Bidders should indicate any terms and conditions in force during the period before an SLA is in place.

Bidder Response:

# 3. THE BIDDER'S PROPOSED SOLUTION

In this section, bidders should describe under each heading their proposed solution to meeting ECSA's requirements as set out in the ECSA/RFP01/2020 document.

## 3.1 Transfer skills to ECSA's in house ICT team

We have placed this item first to emphasise its importance. ECSA is determined to build in-house capacity to maintain and support its core systems. Bidders should present a credible plan with SMART goals to transfer expertise and knowledge to the ECSA team.

**S**pecific

**M**easurable

**A**chievable

**R**elevant

**T**ime-based

Bidders should indicate the skills that an in-house ICT team will need to support ECSA's implementation of Dynamics 365 CRM, the Power Apps portal, the new data warehouse, as well as the integrations with other systems. Measurement is very important. How will ECSA measure the skills levels achieved?

To facilitate skills transfer, ECSA wishes to embed its analyst-programmer and software developer within the partner’s development team. Loading will be at 75%. In their response, but without quoting specific Rand amounts, bidders should indicate in principle how this will affect their bid pricing.

Bidder Response:

## 3.2 Overhaul and extend the ECSA portal

*Note that the ECSA portal will become the primary interface for submission of applications. However, a small percentage of applicants will want to submit via email or courier. In such cases, ECSA staff will need to capture the application directly into the CRM.*

The ECSA portal is built using Microsoft Power App Portals (formerly known as Dynamics 365 Portals). Stakeholders (e.g. engineers) complain that **the portal is difficult to use**. Consequently, only 20% of applications for registration arrive via the portal. The remaining 80% of traffic arrives by courier or email. ECSA wants to reverse those figures.

ECSA also wants to **expand the functionality offered by its stakeholder-facing portal** to serve Higher Education Institutions, Voluntary Associations, Academies, Licensed Bodies and CPD Service Providers. Currently, only engineers are served – they can submit applications for registration and upload CPD activities.

The renovation partner will review the portal with CPD, Education and Registration business units, understand their problems and agree a redesign that greatly improves the user experience.

Bidder Response:

## 3.3 Plug the process gaps in the existing system

Currently, much work is performed off the system because either, a) the process was never built, or b) the process was partially built but the business will not use it until the process runs end-to-end on the system. The partner will **renovate the system to complete the missing functionality** in each business process.

This is where the bulk of the application development work lies.

Bidders should indicate how they propose to meet this requirement. Please refer to the RFP document, section 6.3, Plug the process gaps in the existing CRM system as well as its Appendix A for more detailed coverage of the business processes. You may also wish to view the recording of the system demo from the compulsory briefing session.

Bidder Response:

## 3.4 Build and deploy a chatbot on ECSA portal and website

ECSA wishes to reduce the workload on contact centre and Finance staff by deploying a chatbot that can handle routine queries 24/7. The added benefit will be a superior experience for the engineer, academy, CPD service provider, voluntary association, licensed body, or educational institution that wants an answer to a routine question.

With support from the renovation partner, subject matter experts will be able to identify the types of queries that a chatbot can reliably handle. With guidance, they will prepare trigger phrases, describe topics, entities, synonyms, conditions, and dialogues needed for the partner to build the chatbot.

The **chatbot must integrate with Dynamics 365 and Sage Evolution** to get answers to person-specific queries such as account balance, next renewal date, renewal status, etc. Consideration must be given to ensuring that, when divulging person-specific information such as an account balance, the person interacting with the chatbot is in fact who they say they are.

The chatbot must provide for real-time hand off to a contact centre operator during office hours. The chatbot will also take a message for the contact centre and create or update a query in the O!Connect call centre system. A complaint logged via the chatbot must generate a record in SHEQsys. A stakeholder should be able to see the status of their query or complaint via the chatbot.

Bidders should set out their proposed solution below.

Bidder Response:

## 3.5 Design, build, populate and deploy a data warehouse

ECSA maintains an operational database of approximately 52 000 registered persons. Being stored in Microsoft Dynamics 35 CRM (in the Dataverse), the database model is complex and difficult for business users to understand. Running analytics against a transactional database also risks a performance hit that will slow down response times for users.

A centralised data warehouse will provide business users with easy-to-understand, high performance reporting and analytics without compromising operational performance.

Requirements are set out in the RFP section, 6.5 Design, build, populate and deploy a data warehouse.

Bidders should set out their proposed solution, including but not limited to:

* what data warehouse model and architecture will be used
* what technology platforms and tool will be used, and any licenses that ECSA will need to buy (their cost should be itemised in the separate pricing proposal)
* how business requirements will be collected
* how data will be extracted from each source system and how the extracted data will be cleaned, transformed and loaded
* how the data warehouse will be kept fresh
* how access rights will be determined and implemented
* how staff and leadership will be trained to make the most of the data in the warehouse
* a description of the skills ECSA ICT staff will need to support and maintain the data warehouse
* the name of the consultant(s) who will do the work, and a link to their CV(s).

Bidder Response:

## 3.6 Develop and deploy reports, visualisations and dashboards

The table below lists the minimum system report requirement for the purpose of scoping the work. It is not exhaustive; more report requirements will be discussed during user requirements workshops and handled via project scope change control. The system must provide for pre-defined and run-time-defined reports, paginated reports, visualisations and dashboards.

The handful of existing Power BI dashboards need to be updated to get data from the DW instead of from Excel.

Bidders will need to gather detailed requirements from product owners and reach consensus on whether a report is better presented as a visualisation on a dashboard, or as a paginated report that can be emailed to an external stakeholder. Reporting needs are listed in the RFP section 6.6 Develop reports, visualisations and dashboards. There are likely to be further requirements as the project progresses. Any new items will be handled under project change control.

Besides Power BI, what tools, if any, does the bidder propose to meet ECSA’s reporting needs? How will the bidder approach the report specification and development work?

Bidder Response:

## 3.7 Train internal users of the CRM system

As modules are released into the production environment, the renovation partner must work alongside the BU managers to ensure that key users are trained in the operation of the released module.

How do you propose to handle this?

Bidder Response:

## 3.8 Ensure data integrity and input validation

The renovation partner will work with Executive: Regulatory Functions and with business stakeholders to establish the delegations of authority . Once approved by Executive: Regulatory Functions, the partner will operationalise the DoA within the CRM system.

In addition to the above controls, the system must validate data at time of capture and include data lookups to prevent typing errors on fields that should not be free format text.

When a user enters a physical address, the system must **ensure that the correct postcode is also entered by means of an intelligent look up facility**.

The system should, if feasible, integrate with systems at, or approved by, the **Department of Home Affairs** to verify living status and name for a given South African ID number.

For a fuller description, refer to RFP section 6.8, Ensure data integrity and input validation.

Bidder Response:

## 3.9 Verifiable certificates

A minor change is needed to the existing approach to make it easier to check the validity of a certificate. Currently the certificate includes a long, printed URL linking to the certificate stored in PaperTrail. A shorter URL will make for easier typing, and a label reading “Verify this certificate at:” would help too. Bidders may proposal other solutions that will protect against fraudulent certificates. ECSA will directly engage the PaperTrail vendor to make any changes defined by the renovation partner.

Bidder Response:

## 3.10 Integrate with PaperTrail DMS

CRM already integrates with PaperTrail but this needs to be tighter. The CRM system and ECSA portal must have two-way integration with the PaperTrail Document Management System (DMS) to store and retrieve documents. Documents include but are not restricted to invoices, statements, applications (in the sense of an engineer applying to be registered with ECSA), supporting documentation, evaluation reports, South African identity document or foreign passport (scanned as image or PDF), etc.

Bidder Response:

## 3.11 Integrate with Sage (Pastel) Evolution ERP

The system must be more tightly integrated with the Sage Evolution ERP that ECSA uses for financial accounting. Sage maintains a set of APIs which may assist. The CRM must trigger the creation of an applicant’s debtors account, as well as for invoicing – both *ad hoc* and annual (every April).

A custom developed middleware module (C# and Javascript) currently passes billing information to the ERP which then raises invoices. This needs to be improved so that Finance can conduct the annual billing without routine ICT intervention.

The chatbot must be able to pull an account balance for a registered person and trigger a request for statement.

Bidder Response:

## 3.12 Integrate with SHEQsys Quality Management System

ECSA currently uses the SHEQsys Quality Management System (QMS) to handle stakeholder complaints. The CRM system must easily display related complaints recorded in SHEQsys when viewing a person record in the CRM. A stakeholder must be able to log or view a complaint in SHEQsys from within their portal page or from the chatbot.

To access SHEQsys via its API, the SHEQsys vendor would need to develop a custom endpoint. Bidders may propose a simpler solution.

Bidder Response:

## 3.13 Integrate with Ocular O!Connect contact centre system

ECSA currently uses Ocular's O!Connect cloud-based contact centre solution to handle stakeholder queries. The CRM system must easily display related queries recorded in O!Connect when viewing a person record in the CRM. A stakeholder must be able to log a query from the ECSA portal or chatbot, and have it automatically created in O!Connect. Similarly, they must be able to view the status of a query or complaint they have logged.

Bidder Response:

## 3.14 Enhance integration with SagePay/Netcash payment gateway

ECSA uses SagePay and Netcash to accept online payments in respect of applications and annual fees. The billing system and portal must continue to integrate with our existing payment gateway, Netcash, for credit card and EFT processing in ZAR currency.

The gateway already works via a QR code on the invoice. The portal implementation of the gateway requires some renovation.

Bidder Response:

## 3.15 Integrate with SMS and WhatsApp

For bulk and individual communication to applicants, registered persons and all ECSA stakeholders, the system must have integration with SMS and WhatsApp.

ECSA also wishes to deploy WhatsApp chat capabilities similar to those of a chatbot.

Bidder Response:

## 3.16 Integrate with Social Media Platforms

ECSA is present on Twitter, Facebook, Instagram, LinkedIn and YouTube. The system must be able to pick up and record queries and comments raised within these platforms.

If feasible, the system should post a response back to those platforms under the original post. If not feasible, the partner should advise SRM business unit how to create a generic response on the platform.

Bidder Response:

## 3.17 Advanced search options on ECSA portal

The public part of the ECSA portal must provide advanced search functionality to look up/filter: registered persons, voluntary associations, CPD activities, CPD service providers, and licensed bodies.

The website currently provides for a member of the public to search for a registered person, a validated CPD activity, a licensed body and voluntary association. Except for the [registered persons search](https://www.ecsa.co.za/SitePages/Who%20is%20Registered.aspx), behind the scenes, the website simply links to the [public part of the ECSA portal](https://engineeringcouncilsa.microsoftcrmportals.com/cpd-activities/). However, the search options are limited to a simple search on one field. An advanced search/filter is needed to provide a richer more functional search experience using a variety of search/filter fields. The registered persons search should be moved from the website to the portal. Changes to the links on the website will be handled outside this RFP.

See the current search at <https://engineeringcouncilsa.microsoftcrmportals.com/cpd-activities/>

Bidder Response:

## 3.18 Compliance with POPIA

The system must support ECSA's compliance to the Protection of Personal Information Act (POPIA).

Bidders should indicate in their response what experience they have in these areas.

On the portal where we collect a data subject's personal information, data subjects must consent to ECSA processing their personal information. A link to our privacy policy and POPIA forms must be displayed.

Bidder Response:

## 3.19 System performance

System performance expectation for renovated modules: screen transitions and response times to be equal to or faster than average pre-renovated values. New modules' performance to be no worse than renovated modules on average.

How would you measure and manage this?

Bidder Response:

## 3.20 System security

If custom integrations are developed, good cybersecurity practices should be implemented to prevent malware injections, data leaks and breaches.

Bidder Response:

## 3.21 Summary of Deliverables

The renovation partner will deliver the following:

1. Skills and knowledge of Dynamics 365 CRM, portal, chatbot and integration components transferred from the renovation partner to ECSA ICT staff such that ECSA's core systems can be maintained in house to limit dependence on external service providers.
2. Documents that demonstrate for each business process a shared understanding by the partner and ECSA product owners of the detailed requirements (and definition of done) for each business process, so that components are built and tested to an agreed specification.
3. A clear definition of the delegations of authority (obtained from Executive: Regulatory Functions) pertaining to the ownership of registered person records so that there is a single point of responsibility for approving, cancelling, and reinstating a registration.
4. A Dynamics 365 CRM system integrated with Sage Evolution such that routine ICT intervention to support annual billing is no longer required.
5. A renovated and extended Dynamics 365 CRM system that handles business processes operated by Education, Registration, CPD, QMP, and Legal business units.
6. A renovated ECSA portal that is user-friendly and secure, and is expanded to include Higher Education Institutions, Voluntary Associations, Licensed Bodies, Academies, and CPD Service Providers.
7. A case management system that handles Legal cases arising from complaints/allegations of improper conduct by registered persons.
8. A Dynamics 365 CRM system and portal integrated with Sage Evolution, PaperTrail, SagePay, Netcash, O!Connect and SHEQsys.
9. An "intelligent" chatbot accessible from the ECSA portal and ECSA website that provides registered persons with immediate answers to simple queries and can hand off to a human contact centre operator during office hours.
10. A centralised data warehouse or data mart, refreshed daily, that supports strategic and operational decision-making.
11. Power BI reports and dashboards that provide predefined visualisations but allow filtering, slicing and dicing across key dimensions including the time dimension.
12. Power BI services that provide power users with self-service reporting capabilities.
13. Paginated reports that satisfy current business needs – that can be extracted in either Excel or PDF format.
14. Users trained to operate the renovated system.
15. Source code and customisations written for ECSA that are needed to maintain ECSA's customised CRM and integrations with other ECSA systems.

Bidders do not need to repeat themselves here. But if you have any comments not covered elsewhere, you should mention them below.

Bidder Comments (if any):

# 4. BIDDER's PLAN OF APPROACH

## 4.1 A fixed price for a fixed scope of work

ECSA asks bidders to quote a fixed price for a fixed scope of work. The business requirements set out in the RFP document provide this fixed scope.

**PLEASE DO NOT INCLUDE ANY PRICING INFORMATION IN THIS DOCUMENT. THE FINANCIAL PROPOSAL MUST BE IN A SEPARATE SEALED DOCUMENT.**

## 4.2 Dealing with scope change

Bidders should expect the scope to change as the project progresses, and such scope changes will be handled according to an agreed change control process.

To control its project budget ECSA may choose to trade an increase in scope in one process with a scope reduction in another process. A fair, efficient, low-friction mechanism for this trading needs to be put in place.

Bidders should propose a process for project change control, including how a scope "trading" mechanism would work.

Bidder Response:

## 4.3 Onboarding the team and building business knowledge

Bidders should propose a cogent plan to onboard their resources at ECSA, acclimatise them, and quickly grow their business process knowledge and professional relationships. The successful bidder will have access to the following resources to assist with this:

* the [ECSA website](https://www.ecsa.co.za/)
* PaperTrail DMS – policies, procedures and standards for each business process
* Process experts from the business units and ICT

Bidder Response:

## 4.4 Software development approach

ECSA asks bidders to set out their approach to managing the software development.

Bidders should explain how they propose to:

1. Approach the renovation using plan-driven (waterfall) and/or agile methods to deliver value incrementally.
2. The phases, epics, sprints or stages of the project.
3. Validate and groom the requirements from business.
4. Document, store and make visible the product backlog, issues and roadblocks.
5. Provide tool support. Does ECSA need to license any tools to support the project? If so, name them here but include costs in the separate pricing proposal.
6. Help ECSA decide what changes are not cost-effective and should be rejected.
7. Test the deliverables and obtain sign-off from the product owner.
8. Process a new requirement from a business unit. Would you accept it without challenge? What steps would you go through before developing the change?
9. Handle a requirement that cannot be implemented within the Dynamics 365 CRM but requires custom development.
10. Get approval from ECSA for work done so it can be billed.
11. Handle a difference of opinion between bidder and ECSA so that any conflict is managed and resolved.

Bear in mind that a variety of requests need to be handled, including Dynamics 365 CRM customisation, chatbot co-development with users, C# programming to build new (and modify existing) specialised components, using REST APIs, Power Automate, and other methods to integrate the Dynamics 365 CRM, Sage Evolution, PaperTrail, chatbot, O!Connect, SHEQsys and ECSA portal.

Bidder Response:

## 4.5 Project governance

ECSA proposes the following ECSA representation on a project board or steering committee.

* **Project Director/Chairperson (ECSA):** Brings an ECSA-wide perspective, weighs business unit priorities, makes the tough decisions, and approves delivered work for payment.
* **Product Owner: Education BU**. Will sign off delivered work on behalf of the BU.
* **Product Owner: Registration BU**. Will approve delivered work on behalf of the BU.
* **Product Owner: CPD BU**. Will sign off delivered work on behalf of the BU.
* **Product Owner: Legal BU**. Will sign off delivered work on behalf of the BU.
* **Product Owner: Finance BU**. Will sign off delivered work on behalf of the BU.
* **Product Owner: Quality Management BU**. Will sign off delivered work on behalf of the BU and ensure that a quality management process is in place.
* **Product Owner: QMP BU**. Will sign off delivered work on behalf of the BU and ensure that a quality management process is in place.
* **Product Owner: SRM BU**. Will sign off delivered work on behalf of the BU and execute the project communications plan set out in the project charter.
* **Human Resources representative**: Will address the project's impact on job roles and job content.
* **Manager, ICT:** Will represent ICT unit's interests – security, skills transfer, policy adherence, production releases.
* **Manager, ICT Strategic Interventions:** Review project management and software deliverables from the partner. Deputise for the project director/chairperson.
* **Ad hoc ECSA representatives** on a need-to-attend basis.

ECSA asks bidders to propose a project governance framework that considers ECSA's need for an oversight committee. Bidders should indicate which roles they propose to add to the committee, as well as their proposals for effective project governance and risk management.

Bidders should also name the **account manager** who will be the escalation point for issues that cannot be resolved by the project manager.

Bidder Response:

## 4.6 Project timelines

ECSA hopes to appoint the winning bidder by mid-June 2022. In their proposals, bidders should indicate by when they will be able to start, and set out their expected timelines for each phase of the project. A monthly granularity is sufficient.

Bidder Response:

APPENDIX: OPTIONAL FURTHER INFORMATION FROM BIDDER

Bidders may use this appendix to add further information they wish to convey.

Bidders may also provide hyperlinks to relevant information on their website.

1. The Partner shall apply reasonable endeavours to avoid churn in the core team. If the Partner replaces a member of the team, ECSA reserves the right to vet and approve/decline the replacement; and the Partner will bear the entire cost to ECSA of bringing the replacement up to speed. Unless shown otherwise, this cost is assumed to be **two person-months** of effort. [↑](#footnote-ref-2)