



RTIA

Road Traffic Infringement Agency

Justice in Adjudication

BID NUMBER:	RFP01/2022/23
DESCRIPTION:	TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING <u>CLOUD BASED</u> INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS.
VALIDITY PERIOD:	120 Days from the closing date.
CLOSING DATE:	30 May 2022 @11:00am
PROPOSALS MUST BE HAND DELIVERED/ COURIERED TO:	Road Traffic Infringement Agency Head Office (at the reception) Waterfall Edge B, Howick Close Waterfall Office Park Bekker Road Midrand 1685
ATTENTION:	Supply Chain Management Office: Mr Kwena G Moloko
Enquiries	bids@rtia.co.za and kwena.moloko@rtia.co.za
Proposals must be deposited inside the RTIA bid box situated at building mentioned above on or before closing date and time.	
Compulsory Clarification Session: Visual Meeting using the below link; Join Zoom Meeting https://us06web.zoom.us/j/88360660424?pwd=YWEzM04rd0RmV1hhUXFpTTV2c21lZz09 Kindly connect using the company name when joining the meeting. Date: 10 May 2022 Time: 11: 00am	
COMPANY NAME:	

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

1. PURPOSE

The Road Traffic Infringement Agency (RTIA) would like to invite bid proposals from competent service providers to provide an existing cloud based integrated Customer Relationship Management (CRM) System and call-centre solution on a leasing basis, including maintenance and support for a period of five (5) years.

2. BACKGROUND

The Operations and Information Management Unit amongst other matters related to AARTO, provide a Call Centre Service to infringers who have been issued with AARTO notifications. Following the issuance of such AARTO notifications, the infringers may make contact with the AARTO Call Centre in order to enquire on a way forward to effectively deal with whatever notification has been dispatched and received by the infringer.

From time to time, the Call Centre agents will also interact Issuing Authorities in order to provide the caller a 360-degree service in order to resolve the query or problem registered by the infringer.

Currently, the limited call-center software in use, functions separately from any other system utilized by the Agency, including the most important system of them all, the National Traffic Information System (NaTIS). This arrangement does not allow the call-center agents to access quickly and in real-time, customer relevant NaTIS information in order to supply such information during the telephone and other support channels.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

As per the approved Annual Performance Plan (21-22), through Programme 4 under Governance & Sustainability, which provides for improved Accessibility & Voluntary Compliance, the RTIA is to ensure that the Call-Centre CRM System is introduced and implemented within the 21/22 financial year.

By implementing the Call-Centre CRM System which is cloud based, the Agency will be in a better position to provide callers and in particular infringers, with an optimal, effective and more professional service on all AARTO related matters. A customer experience that bridges the gap between CRM Systems and call-centre processes is required.

By outsourcing the CRM integrated call-centre system, the Agency is more likely to avoid large up front investments and other expenses associated with internal deployment in favor of a flatter and more predicable monthly fee.

The biggest advantage will be that the Agency will be placed better to deal with the cost of variable demand in customer demand volume.

In essence, the Agency wishes to procure the following based on the following principles (bidders to motivate where applicable):

- 1) Two solutions: Call/Contact Centre & Client relationship management.
- 2) Both solutions must be provided by the successful tenderer to ensure a single point of responsibility.
- 3) Integrated system security measures
- 4) 24 hours per day, 7 days per week reliable and available systems
- 5) 99% uptime
- 6) The Solutions must be integrated.
- 7) Costing to be provided for each solution separately as number of users for each will be different.
- 8) Costing to be based on a rate per active user for a month. I.e. a user that did not use the system for that month must not be charged for. I.e. a rented solution.
- 9) Only one solution may be selected.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- 10)If applicable, a single fee for the public who may access the CRM to view feedback.
Not per member of the public.
- 11)The current call sharing number (086 662 8861) as provided by Telkom must be integrated into the solution.
- 12)Cloud based solution to avoid physical installation of hardware and software on site.
- 13)Access to the system to be provided via the Internet.
- 14)Using the latest industry standard technologies and using Chrome web-browser to access the solution
- 15)Must already be fully functional and working and used by a variety of different customers.
- 16)No special user equipment should be required except for audio port, industry standard headsets, speakers and microphone. The Agency will provide the required user equipment. The service provider need to provide the specified number of headsets.
- 17)Agreement to provide for earlier termination after a notice period three (3) months.
- 18)Force majeure clause to be included in the actual contract to deal with unavoidable catastrophes such as court cases etc.

3. SCOPE OF WORK

3.1 General Services Required

- **Application software** – service provider need to deliver a centralised integrated CRM / Call-Centre solution which is “Cloud” based and hosted and which is also capable of integration with NaTIS and other RTIA systems via API's.
- **Hardware** - the service provider will be responsible for the hosting and maintenance of the hardware as a cloud based solution.
- **Software Configuration-** the service provider will be responsible for installing and configuration of the chosen application software.
- **Network Access** – The solution will be accessed via the Internet using standard https encryption. The bandwidth requirements per user should not exceed one (1) Mbps. Mobile access via 3G must be sufficient to use the solution effectively.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- **Data Transfer, conversion and mapping** - the service provider will be responsible for extracting and migration of data from the existing repositories, converting and / or mapping the data as per RTIA's IT requirements
- **Testing** - the service provider will assist RTIA staff with user acceptance testing of the integrated CRM system solution and correct any components that fail to meet the agreed specifications
- **Total Costing-**
 - CRM: 20 active users per month
 - Call Centre: 30 active users per month
- **Costing separation-** CRM / Call Centre costing to be separated due to the number of user access accounts that will differ

3.2 Specific Requirements

The appointed service provider must provide an integrated CRM / Call-centre solution that caters for the following functionalities:

Call Centre:

- **Contact Management** – stores contact information such as names, addresses and telephone / cellular numbers of clients. The storage solution must allow for an easy searchable database. Fields must be logically organised. The updating of information fields also required.
- **Email Integration** - integrate with email such as Gmail, Outlook, Yahoo, etc. allowing for the management and segmentation of contact lists as well as a central hub for internal cross-collaboration. Must also allow for the retrieving of previous interactions with the client best possible experience and care.
- **Reporting and Analytics-** allow for own and specific generation of Call-Centre Agents performance reports (daily, weekly, monthly, quarterly and annually)
- **Multimedia Integration-** inbound, proactive outbound, Email, fax, SMS, WEB and social media
- **Recording capability-** A voice recording system with storage media capability

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- **Quality Assurance Management**- allow for Call-Centre Agents to be evaluated and scored through online templates that is integrated with the recording of the number of calls handled, dropped or ignored.
- **Integration Capability** - must be able to integrate with NaTIS that will allow for the viewing on one central screen by the Call-Centre Agent
- **Work from home capability**- must allow the option for the Call-Centre Agent to work from home
- **Dashboards** - call-centre agents performance must be provided a highly visible (tv screen) dashboard functionality and must be updated in real-time. The dashboard must be accessible from various portals that improves the ease of access.
- **Marketing Automation** - target clients with useful automated AARTO marketing information
- **Chat Integration** - directly from CRM, allow for a chat platform with clients and employees
- **Call-Centre Automation & Integration** - must allow for the controlling of the call-centre from the CRM platform or any other current 3rd party system utilised by the Agency
- **Web Analytics Integration** - allow for the analysing of raw website data, identify problem areas and suggests ways to improve. Must have the capability to collect and access web usage statistics.
- **Role Based Views capability** - allow for access restrictions based on the role in the Call-Centre process in order to prevent and protect against data-leaks (Protection of Personal Information in terms of POPIA – Protection of Personal Protection Act)
- **Testing Environment** - allow for a testing environment for call-centre agents to get use to the functionalities before commissioning
- **Security** - allow for the creation and maintaining of user activity and audit trail
- **Contact Centre landline number – the current Telkom based landline number (086 122 7861) must be retained with the CRM / Call Centre system offered**
- **Interactive Voice Recordings** – allow to change interactive voice recordings within a very short period of time. Mus also allow to override or amend routing strategies when emergencies or other unexpected situation occur.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- **Automatic Call Distributor** - allow for the automated routing of calls to available call-centre agents and also cater for the caller to select assistance for a specific category
- **Computer Telephony Integration** - allow for the displaying of customer details on the desktop of the call-centre agent and also allocate reference numbers for calls attended to (must be retrievable- including voice call recordings)
- **Activity Codes** - allow the call-centre agent to capture activity codes in order to have accurate statistics on the calls attended to (infringement notice query, courtesy letter query, enforcement order query etc.)
- **Survey Capability** - allow for an option for the caller to select (after the call) would like to participate in a short survey – either all callers or randomly selected)
- **Headsets – 50 units** to be supplied by the successful bidder and be connected to the PCs/Laptops of the staff
- **Up-time guarantee** – there should be an uptime guarantee of at least 97% during standard business hours and at least 90% during afterhours.
- **Performance** – the solution must respond within two (2) seconds when changing screens or querying a specific record.
- **PABX functionality** - the call-centre solution must include PABX functionality
- **Installation and configuration-**
 - the appointed service provider shall install and configure the Call Centre system as per the call-centre requirements listed.
 - The system should be hosted by the Service Provider and any services to be hosted within the borders of South Africa.
 - The Call-Centre application should be accessible via different end-user devices (computer, mobile phones, tablets and any other end-user tool)
 - The Call-Centre application should be accessible with all currently available browsers (Edge, Chrome, Safari and Firefox). No specific applications need to be installed on user equipment.
 - The Call –Centre system should be world-class highly available, cost effective and hosted and managed by the Service Provider.
- **Enhancements** - Any enhancements should be continuously deployed with zero effort from RTIA IT department

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- **Maintenance-** Maintenance for a period of five (5) years on the application and user licenses
- **Professional Services-** Contractor services / support for the implemented solution to cater for specific integration requirements not included as part of standard maintenance
- **License Growth** – the contracting model must cater for license growth in terms of as and when requirement
- **Training** - On ad-hoc basis or as and when required and must include training related to the system, first line support and in-depth training for up to six (6) staff members. All training manuals related to the system, to be provided by the service provider
- **Documents and Handover** – the service provider needs to deliver all solution specification documents to the RTIA, including business and technical resources

CRM requirements :

- **Document Management** – collect, upload, store and share documents in a centralised location making it easier for everybody involved to access the information
- **Workflow automation-** AARTO notification management – allow for the sending of AARTO notifications generated by the National Contravention Register that forms part of NaTIS , through email whilst the customer is still on the line.
- **Cloud-based CRM** –make use of a highly – customized Cloud-based hardware and software systems that require software licenses to store customer data
- **Public Access-** A single fee for the public who may access the CRM. Not per member of the public.
- **License Growth** – the contracting model must cater for license growth in terms of as and when requirement
- **Professional Services-** Contractor services / support for the implemented solution to cater for specific integration requirements not included as part of standard maintenance
- **Enhancements** - Any enhancements should be continuously deployed with zero effort from RTIA IT department

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- **Up-time guarantee** – there should be an uptime guarantee of at least 97% during standard business hours and at least 90% during after-hours.
- **Performance** – the solution must respond within two (2) seconds when changing screens or querying a specific record.
- **Maintenance-** Maintenance for a period of five (5) years on the application and user licenses
- **Installation and configuration-**
 - the appointed service provider shall install and configure the CRM system
 - The system should be hosted by the Service Provider and any services to be hosted within the borders of South Africa.
 - The CRM application should be accessible via different end-user devices (computer, mobile phones, tablets and any other end-user tool)
 - The CRM application should be accessible with all currently available browsers (Edge, Chrome, Safari and Firefox). No specific applications need to be installed on user equipment.
- The CRM application should be world-class highly available, cost effective and hosted and managed by the Service Provider
- **Security-** allow for the creation and maintaining of user activity and audit trail
- **Testing Environment** - allow for a testing environment for users to get use to the CRM functionalities before commissioning
- **Role Based Views capability-** allow for access restrictions based on the role in the CRM process in order to prevent and protect against data-leaks (Protection of Personal Information in terms of POPIA – Protection of Personal Protection Act
- **Mobile CRM-** all call-centre agents have access to smart-phones and therefore the CRM must be able to be accessible on a remote device making use of programs and apps.
- **Files Sync and Share** – allow for a synchronised platform – upload emails, from outlook, sync with Google Drive, and import spreadsheets.

4. PROJECT DELIVERABLES

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

Link deliverables of the project with the scope of work and timeframe:

Deliverables	Timeframe
1 Planning	1 Week
2 Requirements Analysis	1 Week
3 Customisation	2 Weeks
4 Implementation	1 Week
5 Training & Commissioning	1 Week
6 Fully functional and working solution	Throughout the contract period

5. MANDATORY REQUIREMENTS

Bidders must comply with the requirements and submit all required document(s) indicated hereunder with the bid documents at the closing date and time of bid. This phase is not scored and bidders who fail to comply with all the mandatory criteria will be disqualified.

5.1. Bidders are required to be registered on the Central Supplier Database and the Road Traffic Infringement Agency shall verify the bidder's tax compliance status through the Central Supplier Database. 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 Central Supplier Database. It is therefore a condition of this bid that the tax matters of the bidder be in order at any point in time from the closing date of the bid. This bid will only be awarded to a bidder(s) whose tax status on Central Supplier Database is compliant. Compliance should remain valid for the duration of the contract.

5.2. Bidders are required to attend a compulsory briefing session.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

6. EVALUATION CRITERIA

- 6.1. Only bidders who have complied with mandatory requirements will be evaluated for functionality. Bidders must, as part of their bid documents, submit supportive documentation for all functional requirements as indicated hereunder. The Bid Evaluation Committee (BEC) responsible for scoring the respective bids will evaluate and score all bids based on their submissions and the information provided.
- 6.2. The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These marks will be added and expressed as a fraction of the best possible score for all criteria.
- 6.3. Functionality will be evaluated on the basis of the supporting documentation supplied by the bidders in accordance with the below functionality criteria and values.
- 6.4. The evaluation of the functionality will be evaluated individually by Members of Bid Evaluation Committee in accordance with the below functionality criteria and values.
- 6.5. The applicable values that will be utilized when scoring each criterion ranges from: **1 being Poor, 2 = Average 3 = Good, 4 = Very Good & 5 = Excellent.**

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
Maintenance Plan	<p>Inclusion by the service provider of a five (5) year maintenance and support of the proposed solution developed:</p> <ul style="list-style-type: none"> • Five-year maintenance and support plan included – Scoring 5 • Four-year maintenance and support plan included- Scoring 4 • Three-year maintenance and support plan included- Scoring 3 • Two-year maintenance and support plan included – Scoring 2 • 1 Year maintenance and support plan included- Scoring 1 	10

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
CV's	<p>Bidders must provide the CV's of the project management team together with an indication of the number of years' applicable experience of each person;</p> <ul style="list-style-type: none"> • 10 years combined applicable experience – Scoring 5 • 9 years combined applicable experience – Scoring 4 • 8 years combined applicable experience – Scoring 3 • 7 years combined applicable experience – Scoring 2 • 6 years or less combined applicable experience –Scoring 1 	20

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
Company experience	<p>Bidders must provide the experience of the company with respect to the solution required together with an indication of the number of years' applicable experience;</p> <ul style="list-style-type: none"> • 10 years applicable experience – Scoring 5 • 9 years applicable experience – Scoring 4 • 8 years applicable experience – Scoring 3 • 7 years applicable experience – Scoring 2 • 6 years or less applicable experience –Scoring 1 	20

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

<p>METHODOLOGY/ APPROACH</p>	<p>Bidders must provide full details of proposed installation for the provision of a Call-Centre / CRM Management System to the RTIA:</p> <p>Detailed project plan that highlights:</p> <ul style="list-style-type: none"> (1) Proposed Risks (2) Proposed Timeframes for delivery of solution from awarding of contract (3) Analysis (4) Customisation (5) Implementation (6) Commissioning (7) Training (8) Architectural design of solution (9) Solution for recording of calls (10) Solution for automatic call distribution to call-centre agents (11) Solution that cater for strong data protection (12) Provide guarantee for at least 97% uptime (13) Solution for customers to rate the quality of services (14) Solution for the providing of webchat facilities <p>All project highlights addressed in 6 weeks – Scoring 5</p> <p>All project highlights addressed in 8 weeks – Scoring 4</p> <p>All project highlights addressed in 9 weeks – Scoring 3</p>
---	--

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
	All project highlights addressed in 3 months – Scoring 2 All project highlights addressed in 4 months – Scoring 1	
TOTAL POINTS ON FUNCTIONALITY MUST ADD TO 100		100

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

Scoring Criterion	1 Poor	2 Average	3 Good	4 Very Good	5 Excellent
Maintenance Plan	The Bidder was able to demonstrate and provide for the Inclusion of a one (1) year maintenance and support of the proposed solution developed	The Bidder was able to demonstrate and provide for the Inclusion of a two (2) year maintenance and support of the proposed solution developed	The Bidder was able to demonstrate and provide for the Inclusion of a three (3) year maintenance and support of the proposed solution developed	The Bidder was able to demonstrate and provide for the Inclusion of a four (4) year maintenance and support of the proposed solution developed	The Bidder was able to demonstrate and provide for the Inclusion of a five (5) year maintenance and support of the proposed solution developed
CV's	The bidder was able to demonstrate that the CV's of the proposed project team indicate a combined 6 years or less applicable experience	The bidder was able to demonstrate that the CV's of the proposed project team indicate a combined 7 years applicable experience	The bidder was able to demonstrate that the CV's of the proposed project team indicate a combined 8 years applicable experience	The bidder was able to demonstrate that the CV's of the proposed project team indicate a combined 9 years applicable experience	The bidder was able to demonstrate that the CV's of the proposed project team indicate a combined 10 years applicable experience

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

Company experience	The bidder was able to demonstrate that the experience of the company is relevant and applicable: 6 years or less applicable experience supported by at least three reference letters	The bidder was able to demonstrate that the experience of the company is relevant and applicable: 7 years or less applicable experience supported by at least three reference letters	The bidder was able to demonstrate that the experience of the company is relevant and applicable: 8 years or less applicable experience supported by at least three reference letters	The bidder was able to demonstrate that the experience of the company is relevant and applicable: 9 years or less applicable experience supported by at least three reference letters	The bidder was able to demonstrate that the experience of the company is relevant and applicable: 10 years or less applicable experience supported by at least three reference letters
METHODOLOGY/ APPROACH	The Bidder was able to demonstrate with the Methodology/ Approach provided that all project highlights will addressed within 4 months	The Bidder was able to demonstrate with the Methodology/ Approach provided that all project highlights will addressed within 3 months	The Bidder was able to demonstrate with the Methodology/ Approach provided that all project highlights will addressed within 2.5 months	The Bidder was able to demonstrate with the Methodology/ Approach provided that all project highlights will addressed within 2 months	The Bidder was able to demonstrate with the Methodology/ Approach provided that all project highlights will addressed within 1.5 months

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

6.6. The Bids that fail to achieve a minimum of 70 points out of 100 points for functionality will be disqualified. This means that such bids will not be evaluated on the Preference Points System stage.

6.7 Second Stage – Evaluation in terms of Price

Only bids that achieve the minimum qualifying score for functionality will be evaluated further in accordance with the price.

7. COMPULSORY INFORMATION SESSION

7.1. A compulsory briefing and site inspection session will be held at RTIA as detailed in the Advert. The compulsory Briefing and Site Inspection session provides bidders with an opportunity to clarify aspects of the process as set out in this document and to address any substantive issues that bidders may wish to raise. Any Briefing Notes which may be issued by the RTIA to the Service Providers should be considered as part of this project.

7.2. Firms may ask for clarification on this ToR or any of its Annexures up to close of business forty-eight (48) hours before the deadline for the submission of bids. Any request for clarification must be submitted by email to the Bid Office. Copies of questions and answers will be emailed to all firms that register at the briefing session.

8. SUB-CONTRACTING, PARTNERSHIP/CONSORTIUM/JOINT VENTURE AND COMPANY REQUIREMENTS

8.1. The successful bidder must obtain prior RTIA approval to sub-contract, and/or amend the sub-contracting arrangements.

8.2. A proposal submitted by a company, close corporation or other legal person must be accompanied by a resolution or agreement of the directors or members and be signed by a duly authorised person.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- 8.3. A proposal submitted by a partnership must be accompanied by a written partnership agreement.
- 8.4. A proposal submitted by a consortium or joint venture of two or more parties must be accompanied by a signed memorandum of understanding between the parties to such consortium indicating:
- 8.4.1 the conditions under which the consortium will function;
 - 8.4.2 its period of duration;
 - 8.4.3 the persons authorised to represent it;
 - 8.4.4 the participation of the several parties forming the consortium;
 - 8.4.5 the benefits that will accrue to each party; and
 - 8.4.6 any other information necessary to permit a full appraisal of its functioning.

9. SECURITY AND CONFIDENTIALITY OF INFORMATION

No material or information derived from the provision of the services under the Contract may be used for any purposes other than those of RTIA, except where authorised in writing to do so. All information will be held strictly confidential. The successful Service Provider may be required to sign a Confidentiality Agreement with RTIA.

10. TERMS AND CONDITIONS

- 10.1. The RTIA reserves the right to amend, modify or withdraw this Terms of Reference (ToR) document or amend, modify or terminate any of the procedures or requirements set out herein at any time and from time to time, without prior notice except where required by law, and without liability to compensate or reimburse any Service Provider.
- 10.2. Neither the RTIA, nor any of its respective, officers, or employees may make any representation or warranty, expressed or implied in this ToR document, and nothing contained herein is, or shall be relied upon as, a promise or representation, whether as to the past or the future.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

- 10.3. The costs of preparing proposals and of negotiating the Contract will not be reimbursed.
- 10.4. The RTIA also reserves the right to call interviews with short-listed Service Providers before final selection, and to negotiate price with the Preferred Service Providers.
- 10.5. Firms may not contact RTIA on any matter pertaining to their bid from the time when bids are submitted to the time the Contract is awarded. Any effort by a Service Provider to influence bid evaluation, bid comparisons or award decisions in any manner, may result in rejection of the bid concerned.
- 10.6. Bid submission requirements must be completed in sections and appendices provided in the bid document.
- 10.7. ALL BIDDERS MUST BE REGISTERED ON THE CENTRAL SUPPLIER DATABASE AT NATIONAL TREASURY. More information in this regard is available on www.ocpo.treasury.gov.za. Proof of registration must be submitted together with the technical proposal.
- 10.8. Bidders may provide any additional information deemed important for the RTIA to consider.
- 10.9. Prospective Bidders must at all times comply with the RTIA's Supply Chain rules and processes with regard to all projects and payments.

11. PAYMENT

- 11.1. **Invoice.** The Contractor's Project Manager shall at the end of each month submit a consolidated invoice, certified as correct by the Contractor's Project Manager, showing the actual work performed, hours worked, and manpower inputs for the task and associated costs accompanied by all supporting documents.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

11.2. Detailed Pricing. Service Providers must complete the required SBD Pricing documents and ensure that Prices are:

11.2.1 Firm and inclusive of all costs, including disbursements;

11.2.2 Inclusive of VAT, if applicable;

11.2.3. Correctly calculated and identical to the financial proposal;

11.2.4. Pricing should be detailed, with proper cost breakdown, in line with milestones.

11.3 Fees

Domestic hotel accommodation may not exceed R 1440, inclusive of VAT per night per person. (incl. dinner, breakfast and parking), air travel must be restricted to economy class, and travel claims per kilometre may not exceed the rates approved by the Automobile Association of South Africa.

11.4 Rates

According to the 23 October 2013 Cabinet Resolution as defined in the National Treasury Instruction 01 of 2013/14: Cost Containment Measures sub-paragraph 4.2; the Consultants (or Service Provider) will only be remunerated on the following rates regime:

11.4.1. The 'Guidelines for fees' issued by South African Institute of Chartered Accountants (SAICA);

11.4.2. The "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or

11.4.3. Based on the body regulating the profession of the Consultant.

11.5 Payment information

11.5.1 An invoice only becomes due and payable:

- a. When the Project Manager signs-off on the specific deliverable and submits the invoice for payment;
- b. When the invoice is correct with regards to calculations, information contained, banking details and supporting documents.

TERMS OF REFERENCES FOR THE APPOINTMENT OF A SERVICE PROVIDER /CONSULTANT TO PROVIDE AN EXISTING CLOUD BASED INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND CALL-CENTRE SOLUTION ON A LEASING BASIS INCLUDING MAINTENANCE AND SUPPORT FOR THE ROAD TRAFFIC INFRINGEMENT AGENCY (RTIA) FOR A PERIOD OF FIVE (5) YEARS

11.5.2 It is important to ensure that invoices are correctly submitted and reference the project name, and Order Nr.

11.5.3 Non-compliance will delay the payment process.

12. CONTACT DETAILS

Administrative Contact	Technical Contact
Bidding /Quotation Office	Project Manager
Name: Mr Kwena Moloko	Name: Mr. Peter Baloyi
Supply Chain Management	Business Unit : AARTO Operations and Information Management
E-mail: Bids@rtia.co.za Kwena.moloko@rtia.co.za	and E-mail: peter.baloyi@rtia.co.za

**PRICING SCHEDULE – FIRM PRICES
(PURCHASES)**

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

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of bidder.....	Bid number. RFP01/2022/23
Closing Time 11:00	Closing date: 30 May 2022

OFFER TO BE VALID FOR.....DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)
----------	----------	-------------	---

- Required by:
- At:
- Brand and model
- Country of origin
- Does the offer comply with the specification(s)? *YES/NO
- If not to specification, indicate deviation(s)
- Period required for delivery
- *Delivery: Firm/not firm
- Delivery basis

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

*Delete if not applicable

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

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.

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

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

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.

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