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| **Request for Proposal (RFP)** |
| **for**  ***“Microsoft Dynamics 365 ERP System for icddr,b”***  ***Acquisition and On Premises Implementation***  **OPEN TENDER METHOD**  **Bid Ref: icddr,b/SCM/OTM/05/2020**  ***Date : 06 February-2020*** |

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****SECTION 1: INFORMATION TO BIDDERS****

A guideline for ERP Acquisition and On Premises Implementation project procurement

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# Introduction

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The International Centre for Diarrheal Disease Research, Bangladesh (icddr,b) is a non- profit health research institution located in Dhaka, Bangladesh.

Dedicated to saving lives through research and treatment, icddr,b addresses some of the most critical health concerns facing the world today, ranging from improving neonatal survival to HIV/AIDS. In collaboration with academic and research institutions throughout the world, icddr,b conducts research, training and extension activities, as well as program-based activities, to develop and share knowledge for global lifesaving solutions. The annual budget of the organization in the most current fiscal year is around US$70M.

With the current ERP (Microsoft Dynamics) system becoming obsolete very soon, it is imperative to replace this system, and it has become essential that all of our business processes and information systems be integrated into a single technology platform using a common database and common development environment.

icddr,b invites all eligible entities which fulfil the mandatory eligibility criteria to compete in the bidding process.

# Statement of purpose

The first step in this progression is to establish a common set of processes throughout our organization. This strategy is particularly focused on implementing a wide Enterprise Resource Planning package or ERP software system, which will form (define) the core technology, database, and development environment to be utilized by the organization.

The purpose of this document is to solicit proposals for supplying an ERP software solution to icddr,b. This solution is intended to form the basis for all future systems and programs within icddr,b for the next 10 years. Most of the existing systems within icddr,b will be replaced by the selected ERP system except for those which can be interfaced.

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# PROJECT SCOPE

The following high-level business processes (but not limited to) will be under the scope of ERP implementation project:

1. **Finance**
   1. Accounts (including Project-based accounting)
   2. Budget, Planning and Forecasting
   3. Budget and Costing
   4. Project/Grant Management and Compliance
   5. Fixed Assets
   6. Inventory management
   7. Invoice and Financial Report
   8. Payroll
   9. Treasury
   10. Financial Analysis & strategy development
   11. Provident Fund Management System
2. **Human Resources**
   1. HR Planning
   2. Recruitment and Staffing (Internal and External)
   3. Training & Development
   4. Performance Management
   5. Staff Administration
   6. Compensation & Classification
3. **Research Management**
   1. Donor Management
   2. Grant Management
   3. Subcontracts Management
   4. Research/Protocol & Activity Workflow
   5. Funding Opportunities
4. **Supply Chain Management**
   1. Advance planning and sourcing
   2. Planning to Contract Management
   3. Procure to Pay process
   4. Vendor Management
   5. Warehouse and transportation
   6. Fixed Assets Management
   7. Stock and non-stock Item Management
   8. Inventory Analysis
   9. Asset Management / Inventory Management
   10. Self-Service Procurement in ERP
5. **Facilities management** 
   1. Lease Administration
   2. Bio-Medical engineering services management
   3. Civil Engineering services management
   4. Cafeteria Management
   5. Guest House management
   6. Electrical Engineering services management
   7. General Services management
   8. Travel Services Management
   9. Transport and Fleet Management
   10. Conference room booking
   11. Mail and Laundry Management
   12. Utility bills management
6. **Legal and contracting**
   1. Grant Monitoring Process
   2. Sub Grant Monitoring & Assessment Process
   3. Tracking of Contract Approval Form
7. **IT**
   1. User & Role Management
   2. Workflow Management
   3. Integration/interfacing management
   4. Audit and log management
   5. Administration through Interface
   6. Data Warehouse management
   7. Business Intelligence
   8. Backup & Recovery Management
   9. Job and scheduling management
   10. System change request management
8. **Audit** 
   1. Audit management
9. **Laboratory Services**
   1. Biorepository management including auto-collection of charges
   2. Media requisitioning and auto-collection of charges
   3. Bio-repository system for archiving specimens
   4. Notification for periodical report submission for different Projects to the Donors /Stakeholders
   5. Auto alerting for financial reporting (sending the invoice to Donors) and Technical Report Submission to Donors/Other Stakeholders from Finance/P.I.
10. **Digital Signature Solution**
11. **Development and Communications**
12. Audio-visual, creative work, translation/editing, visiting card
13. Communications work (audio-visual requisition)
14. Donor management and reporting
15. Auto internal memo
16. Contact Management
17. Hospital Appeal
18. Fundraising activities
19. **Interfaces will be required with the following systems but not limited to:**

* Hospital Management System (Dhaka & Matlab)
* Laboratory Information Management System
* Document Management System
* Employee Time Attendance Management System
* Different Web-Based Applications (icddr,b intranet, Web portal)

The ERP Scope of Work and ERP module details are spelt out in Appendix - B; however, during the discovery, icddr,b may make its modifications if necessary.

# CURRENT COMPUTING ENVIRONMENT IN ICDDR,B

icddr,b uses Microsoft Outlook 2019 in its organization-wide e-mail application. Microsoft Office suite is the corporate standard desktop application. The majority of laptop/desktops are running different versions of the Windows operating system (Windows 7/8/10).

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**Current icddr,b locations and employee numbers**

* **icddr,b facilities** are located as follows:

**Head Office**: Mohakhali, Dhaka 1212, Bangladesh

**Matlab Health Research Centre:** Chandpur, Bangladesh

(Matlab Hospital, Surveillance system, Research support platforms).

**Satellite Offices**: Mirpur, Chakaria, Teknaf and field offices in various locations throughout Bangladesh.

* **icddr,b employee numbers**:

Around 5,000 full-time employees for all locations.

**Limitations of current ERP:**

* icddr,b’s current ERP system unable to meet the latest business processes and needs of the organization in the following areas:
* The systems consist of a series of non-interconnected applications in which the same information is often keyed-in manually into multiple systems.
* The information generated by the system for the same items is available from different parts of the system and, sometimes varies with that generated from some other portion of the system.
* Several modules are not integrated, and reporting is made difficult.
* icddr,b current system has been identified by donor reviews with several deficiencies in meeting management and donor requirements

# EXPECTATIONS FROM NEW / PROPOSED ERP

1. Define a single enterprise-level (dynamic application like complete setup/configure by UI based) technology platform, including infrastructure as well as application and database, which will define the basis for supporting the business processes and objectives of the organization
2. To ensure interfaces are provided with current systems as identified.
3. An efficient and faster system which meets all business requirements through end-to-end automation and accessible from anywhere.
4. Improve our ability to meet our donors and stakeholders and thereby achieve a competitive advantage
5. Improve operational efficiencies and reduce operational costs .
6. To increase efficiency and effectiveness by eliminating manual and duplicate work.
7. To take decision using artificial Intelligence enabled Business Intelligence tools for all modules (i.e. Finance/ HR/ Supply chain/ Inventory Analytics etc.) with predictive analysis.
8. Ensure compliance with the standards and applicable policy in financial reporting and disclosures
9. Putting controls in place for ensuring compliance with organizational policies and procedures, and mitigating risk of occurring fraud and error.
10. Paperless business processes with digital signature

The desired corporate-wide business system will be targeted for the following infrastructure and platform environment:

* Converged infrastructure (VMware vSphere 6.5, Hyper-V)
* Network equipment Cisco ( Firewall, Router, Switch)
* Antivirus and IPS (Trend Micro Security)
* Spam and web firewall (Barracuda)
* Email (Microsoft Exchange 2010)
* Domain and SSO (Microsoft Active Directory)
* Backup and recovery (EMC networker and Data domain)

We are looking for an ERP software system that uses a web interface and mobile application.

# PRODUCT REQUIREMENT

Microsoft Dynamics 365 for icddr,b ERP Solution.

# LICENSES REQUIREMENT

In terms of an integrated business system, it is estimated that our organization-wide profile of system users **would consist of 1000 concurrent users** (i.e., 1000 individuals would be simultaneously accessing the ERP application), considering following business users numbers:

|  |  |  |
| --- | --- | --- |
| **User types** | **Number** | **Entry/Approval/View Access** |
| Functional PI (Principal Investigator) | 148 | Both Entry and Approval |
| PI | 198 | Approval |
| Assigned Officer | 15 | Both Entry and Approval |
| Office Manager | 203 | Entry |
| Division Director | 7 | Approval |
| Finance User | 46 | Both Entry and Approval |
| HR User | 28 | Both Entry and Approval |
| SCM User | 23 | Both Entry and Approval |
| FMS User | 60 | Both Entry and Approval |
| RA User | 8 | Both Entry and Approval |
| Legal | 5 | Both Entry and Approval |
| Division Support Coordinator | 6 | View Reports |
| Supervisor | 494 | Approval |
| Employees | 5000 | Employee Self Service |

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# INSTRUCTIONS TO BIDDERS

1. The information provided within this RFP, or any other document supplied by icddr,b is to be considered strictly confidential and shall be considered proprietary to icddr,b. Unless required by the action of a court of law, the bidder agrees that all material which has and will be disclosed regarding icddr,b its donors, programs, suppliers, activities finances, and the like are the confidential and proprietary information of icddr,b. As such, Bidder agrees to maintain the confidentiality of this information. This information is not to be shared with individuals outside of your organization unless icddr,b has specifically provided either written or verbal consent.

In the event that your organization chooses not to respond to this RFP, all material provided within this RFP shall be immediately returned to the listed icddr,b contact individual.

1. We are open to holding a Discovery session with the eligible bidders to give them a high-level understanding of our current ERP system, business processes and business requirements prior to submission of a formal proposal.
2. **Bidders are advised to go through the eligibility requirement carefully before expressing their willingness for the bid. Only the bidder meets the eligibility criteria will be allowed to attend the discovery session.**
3. The bidder may attend the discovery session physically in icddr,b Dhaka office or skype and in both cases, icddr,b should be notified **at least 3 days prior** to the proposed session.
4. We would also like to have a high-level understanding from the bidder on the potential solutions that may best fit icddr,b’s requirements, and extent of customization to be needed and/or the business process (s) that may need to be redesigned.
5. icddr,b is flexible to receive suggestions / recommendations, if any for the sake of receiving a comprehensive and competitive bid from the potential bidders. We may address your suggestions / recommendations during the RFP stage or during the project implementation phase if deem necessary.
6. The RFP document has mostly covered the icddr,b’s business requirements. However, there might be few areas where the requirement not addressed or partially covered or interpreted differently. The bidders shall have the flexibility to address such limitations of the RFP document and shall ensure the appropriate suggestions and actions in their proposal so that the total solution is ensured for icddr,b.

# RFP document:

The RFP document consists of the following:

* A guideline for ERP Acquisition and On-Premises Implementation project procurement (Section 1,2 & 3)
* ERP Scope of Work (SoW, APPENDIX A)
* ERP Module Details & Questionnaire (APPENDIX B)
* Forms and Formats (APPENDIX C)
* Master Service Agreement Template (APPENDIX D)

We strongly encourage the bidders to thoroughly read the documents listed above to have a proper understanding of the project requirement and the documents to be submitted with the proposal during bid submission.

# RFP preparation

1. Information and documents to be provided for all sections shall be submitted as per the guideline mentioned in the RFP document. Please provide your responses using the forms and format attached with the RFP documents, where suggested. You may include supplementary information as part of your proposal if required. However, it should be clearly separated from your spreadsheet responses.
2. **Clarification of RFP document**

Our objective is to ensure that we provide you with all the required information you need in order to provide the best possible complete response to this RFP. As such, we welcome any queries in writing before the proposal submission. Questions or requests for clarification for shall reach to us by 20 February 2020 through e-mail ([erp.procurement@icddrb.org](mailto:erp.procurement@icddrb.org)).

1. **Bid & Performance Security:**
2. No Bid security is required for submission of this bid.
3. Within seven (7) days from the date of acceptance of the Notification of Intent (NOI), the successful bidder shall furnish the Performance Security in the form of a Bank draft, pay order or an irrevocable Bank Guarantee (valid until a date twenty-eight (28) days beyond the Intended Completion Date) for an amount of 10% (Ten) per cent of the Total Contract Price.
4. **Offer Validity**

As guided by this RFP, the proposal for software and services must remain valid for a minimum period of six (6) months from the last date of proposal submission. During this period, the Bidder is expected to keep available, at his own cost, the professional staff proposed for the assignment. icddr,b will make the best effort to complete negotiations within this period. If icddr,b wishes to extend the validity period of the proposals, the Bidder shall agree to the extension.

1. **Expenses**

Any costs incurred by you in preparing and providing a response to this RFP are solely the responsibility of your organization. In addition, if your organization be chosen as one of the organizations asked to provide an onsite demonstration of your proposed solution, the costs associated with that process will similarly be the sole responsibility of your organization.

1. **Bidder Background**

In this section, we are seeking information regarding the background of your organization in order to access the ability of your organization to bring the project to a successful conclusion. Bidder should provide the general information in **Form 2: Bidder’s General information** and attach with technical proposal.

1. **Contents of Technical proposal:**

The Technical Proposal shall provide the following information:

1. A brief description of the firm’s organization and an outline of recent experience on assignments of a similar nature. For each assignment, the outline should indicate inter alia, the profiles of the staff proposed, duration of the assignment, contract amount and firm’s involvement. Please use the attached spreadsheet (**Form 3A**: **ERP Implementation Project Information.xlsx**)
2. Any comments or suggestions on the Terms of Reference, a list of services and facilities to be provided by the Bidder.
3. A description of the methodology and the work plan on the assignment would be performed.
4. The list of the proposed staff team by their specialty, the tasks that would be assigned to each staff member, and their recent signed CVs endorsed by the authorized representative submitting the proposal. Key information should include the number of years worked for the firm/entity and degree of responsibility held in various assignments during the last ten (10) years. (**Form 8: Personnel Capabilities)**
5. Estimates of the total staff input (professional and support staff-time) needed to carry out the assignment supported by bar chart diagrams showing the time proposed for each professional staff team member.
6. **The Technical Proposal shall not include any cost proposal related information. Failure to meet the condition will lead to the disqualification of the bid.**
7. **Contents of Financial proposal:**

In preparing the Financial Proposal (**Form 10**), the Bidder is expected to take into account the requirements and conditions outlined in the RFP documents. It should list all costs associated with the assignment including;

1. remuneration for staff (in the field and at headquarters), and;
2. Reimbursable expenses such as subsistence (per diem, housing), transportation (international and local, for mobilization and demobilization), services and equipment, office rent, insurance, the printing of documents, surveys, and training, if it is a major component of the assignment. If appropriate, these costs should be broken down by activity. Bidders shall express the price of their services in US dollars.
3. In each case in which a specific configuration (of the system software, network, etc.) is provided, you should quote a price for the defined configuration only. While you may recommend, and we may ultimately end up with, a configuration substantially different than what is defined within this document, we want to achieve a specific “apples to apples” comparison of pricing. This will help us to ensure that every organization is judged against exactly the same set of criteria.

In addition, you should provide your most competitive pricing related to the various components of this RFP. It is the intent of icddr,b to use this pricing both as a key element in the ultimate decision regarding the selection of a Bidder, as well as a part of the determination of the budget for the project. Please use **the Form 10** for financial proposal submission.

1. List of Forms and Documents need to be submitted by the Bidder:

|  |  |  |
| --- | --- | --- |
| **SL#** | **FORMS and Documents** | **Forms / Documents** |
| **TECHNICAL PROPOSAL** | | |
| 1 | Cover Letter from Prime Bidder/Implementer | **Form 1** |
| Bidder’s General Information | **Form 2** with documentary evidence asked in the form (e.g. all legal documents, registration, licenses, organizational structure and other requirements necessary) |
| Mandatory eligibility criteria assessment | **Form 3** with documentary evidence as mentioned in the form (e.g. proof of experience, Details of Consortium of Vendors (if any), responsibility matrix, partnership certificate, auditor’s report, CMMI certification, CV of PM) |
| ERP Implementation Project Information (Excel Form) | **Form 3A** |
| Financial Capability Information | **Form 3B** |
| 2 | OEM Authorization | Form 4 |
| 3 | Undertaking from OEM on Commitments | Form 5 |
| 4 | Non-malicious Code certificate | Form 6 |
| 5 | CMMI Certification level | Form 7 |
| 6 | Implementation, Training, Support Plan & Methodology | Proposal Document |
| 7 | Resource Plan, supported by CV for all proposed positions | Proposal Document, Form 8 |
| 8 | ERP Module Details & Questionnaire | **Appendix B** |
| 9 | Conflict of Interest Declaration | Form 9 |
| **COMMERCIAL PROPOSAL** | | |
| **10** | **Commercial Proposal** | **Form 10** |

# RFP submission

It is expected that all proposals submitted would be in accordance with what has been clearly outlined in the RFP. Once a bid proposal has been submitted, it is final. Once you have completed your proposal, your signature or that of a duly authorized individual of your company must be affixed, in order for us to acknowledge the fact that you have read the RFP thoroughly and have completed the proposal within the stipulated guidelines.

The Technical & Financial proposals shall be submitted separately in sealed envelopes. The Technical should be submitted in original hard copy form along with one digital copy. One Digital Media drive must carry the technical proposal only scanned with properly sealed and signed. Please do not include financial proposal copy in the digital media drive

If delivering the proposal in physical, they shall be deposited in the tender box located in Chiller Building Ground Floor (through icddr,b Hospital Entry) addressed to the following, **mentioning the bid name and bidder name on top of the envelope.**

Director, Supply Chain & Facilities Management

icddr,b

68 Shaheed Tajuddin Ahmed Sharani

Mohakhali, Dhaka 1212, Bangladesh

All RFP responses (in hard copy and digital media including any supplementary information) must be submitted no later than **at 4:00 PM (GMT+6)** **on** **6th April 2020.**

**The overseas bidders are advised to courier the proposal to the above-mentioned address keeping adequate time in hand so that the proposal reaches to icddr,b within the submission deadline.**

**Document Indexing:**

Bidders are requested to maintain forwarding letter, proper index at the beginning of the document, section separator, page & index number.

**Important Due Dates**

|  |  |
| --- | --- |
| **Date** | **Items** |
| 4:00 pm 20th Feb 2020 | Last date of receiving questions and clarification request on RFP scope and terms |
| 23rd Feb – 23th Mar 2020 | Discovery Session |
| 4:00 pm 6th April 2020 | RFP Proposal Submission |

# RFP Opening:

The **Technical Proposal** shall be opened immediately after the deadline for submission of RFP in the presence of the SEC. There will be no public opening for the RFP. **The financial offer shall not open with Technical offer and shall be kept unopened at the custody of the Director, SC&FM or his Authorised Officer (AO).**

# RFP evaluation and Negotiation:

1. The proposal will be evaluated following three stages:
2. **Stage 1: Mandatory eligibility evaluation**
3. **Stage 2: Technical evaluation and POC**
4. **Stage 3: Commercial evaluation**

The evaluation in Stage 1 will be on a yes/no basis. The bidder fails to fulfil the mandatory eligibility requirement set in Stage 1 will not qualify for next stage evaluation.

The evaluation at Stage 2 and Stage 3 will be done following the Quality and Cost Based Selection (QCBS) method (70/30). The technical bid will be assigned a technical score out of a maximum of 70 marks. The commercial bid will be assigned a commercial score out of a maximum 30 marks. Only the bidders who get a technical score of 50 per cent or more in each section and 70 per cent (49) or more overall will qualify for the commercial evaluation stage. Failing to secure minimum marks shall lead to technical rejection of the bid.

**Stage 1: Mandatory eligibility evaluation**

The bidders must comply with the eligibility requirements mentioned below:

1. Bidder must have experience of at least twenty (20) MS Dynamics ERP implementation services and technical support within the last ten (10) years with a minimum value of US$ 2 (two) million or equivalent for at least one of the contracts and is fully operational for at least 2 (two) years.
2. In case of Joint Venture, the partner in charge, i.e. lead partner must meet the point # 1, and the collaborating partner must have been in operation in IT sector (ERP software or ERP implementation, Support Services business) for a minimum of last eight (08) years.
3. Bidder must have Microsoft Gold Partnership for last consecutive three (03) years.
4. Bidder (Single or Joint Venture) shall demonstrate average annual business turnover of at least US$ 10.00 (Ten) million or equivalent calculated as total certified payments received for the contract in progress or completed within last 5 (five) years. In the case of the joint venture, one partner must meet at least 40% requirement, and each of the remaining partners must meet at least 25% requirement, but all partners together meet 100% requirement.
5. Bidder (Single or Joint Venture) must demonstrate a minimum US$ 2 (two) Million or equivalent present liquid asset and/or line of credit. In the case of the joint venture, one partner must meet at least 40% requirement, and each of the remaining partners must meet at least 25% requirement, but all partners together meet 100% requirement.
6. Bidder must have a valid certification for SEI-CMMI or equivalent following the industry best practices
7. The proposed Project Manager of the Bidder must be a PRINCE2 Practitioner, or PMP Certified having a minimum of 10 (ten) years’ experience in IT sector with at least 2 (two) successfully completed projects using MS Dynamics 365.

**The eligibility requirements will be on a yes/no basis. The bidder must submit Documentary evidence in support of the above mandatory requirements; failure to comply will lead to rejection of the proposal and shall not be considered for further evaluation.**

**The bidders must take note that in no way they would get a chance to submit the documents after bid submission, so any missing documents against the mandatory eligibility requirement will cause the bid rejected.**

icddr,b reserves the right to verify the authenticity of the submitted documents. If any submissions found fabricated or misinterpreted will also be a cause of rejection of the bid and icddr,b’s decision is final on that which shall be binding the parties involved.

The mandatory eligibility requirement is part of the technical evaluation, and as such, all documentary evidence shall be attached with the technical proposal only.

**Stage 2: Technical evaluation**

Only the Bidders who qualify in stage 1 will be considered for this stage (Technical evaluation). Technical evaluation will start with a **Demonstration and POC** (Proof of Concept) session to be attended by the bidder upon invitation from icddr,b, followed by other evaluation criteria explicitly mentioned in **Table 2**. In the POC session, the bidders will be asked to demonstrate their understanding of icddr,b business process and requirement and how their proposed solution will best fit icddr,b requirement under this ERP solution. **SCM, HR, and Research Administration** processes will be mainly demonstrated by the bidders. However, icddr,b reserves the right to add any other process for POC demonstration and the bidder has to agree on it.

Some technical responses will be measured qualitatively using the following criteria:

1. 100% = Bidder exceed expected criteria of requirement
2. 80% = Bidder meet expected criteria of requirement
3. 60% = Bidder does not meet some minor criteria which are within acceptable limit
4. 0% = Bidder do not meet expected functional criteria

icddr,b reserves the right to check/validate the authenticity of the information and documents submitted against the Technical evaluation criteria, and the bidder shall provide necessary support in this regard. **Table 1** shown below demonstrates how the section-wise technical scoring would be done.

**The bidders must take note that in no way the bidder would get the chance to submit the documents after bid submission. To achieve the maximum scoring in the technical evaluation, (both section-wise and overall), the bidders are advised to carefully review the scoring criteria shown in Table 1 and Table 2 and submit the documentary evidence accordingly.**

icddr,b reserves the right to verify the authenticity of the submitted documents.

***Table 1:***

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Section** | **Total Marks** | **Minimum Qualifying Marks** |
| 1 | Successful Customer References with installation (License sold and Installation) history of Microsoft Dynamics Products | 5 | >= 2.5 (50%) |
| 2 | Customer Reference on implementation of Microsoft Dynamics Navision product | 10 | >= 5 (50%) |
| 3 | Implementation, Training, Support Plan & Methodology | 18 | >= 9 (50%) |
| 4 | Resource Plan | 10 | >= 5 (50%) |
| 5 | Product Demonstration & POC (Proof of Concept) | 10 | >= 5 (50%) |
| 6 | Qualification Questionnaire and Detailed Module & Reports | 15 | >= 7.5 (50%) |
| 7 | SEI-CMMI or Equivalent Certification | 2 | >= 1 (50%) |

The below **Table 2** shows the detailed scoring criteria, methodology and the marks distribution:

***Table 2:***

| **Category** | **Section** | **Scoring Criteria:** | **Scoring Methodology:** | **Maximum**  **Score** | **Total** |
| --- | --- | --- | --- | --- | --- |
| 1. **Installation (License sold and Installed) of Microsoft Dynamics Product**   **(5 marks)** | Successful Customer References with the installation history of Microsoft Dynamics Products | The bidder has installation history with evidence (Work order, PO, Contract) | >=20 and <40 number of installations – 1 Mark  > = 40 and <80 number of installations – 2 Marks  >=80 number of installations – 3 Marks | 3 | 5 |
| Installation of at least one with a value of US $200,000 | If value < US $200,000 – 0 Mark  If value >= $200,000 – 2 Marks | 2 |
| 1. **Project Implementation (65 Marks)** | Customer Reference on implementation of Microsoft Dynamics Navision product(s) | Bidder should have a successful implementation of Microsoft Dynamics ERP product | ≥ 20 and <40 number of implementations – 1 Mark  ≥ 40 and <80 number of implementations – 2 Marks  ≥ 80 number of implementations – 3 Marks | 3 | 10 |
| Successful implementation using D365 | ≥ 2 and < 3 D365 implementations - 1 Mark  ≥ 4 and <6 D365 implementations - 2 Marks  ≥ 6 D365 implementations - 3 Marks | 3 |
| MS Dynamics implementation with one of 300 number of transactional users or more | < 300 transactional users – 0 Mark  ≥ 300 and <500 transactional users - 1 Mark  ≥ 500 transactional users - 2 Marks | 2 |
|  | Core Modules implementation (Finance, HR, SCM, Project) | ≥ 20 Finance Module Implementations – 0.5 Marks  ≥ 20 HR Module Implementations – 0.5 Marks  ≥ 20 SCM Module Implementations – 0.5 Marks  ≥ 20 Project Module Implementations – 0.5 Marks | 2 |  |
| Implementation, Training, Support Plan & Methodology | Requirement Gathering and Elicitation plan | Qualitative score | 2 | 18 |
| Build (Design, development, configuration, customization) & Deployment Plan | Qualitative Score | 4 |
| Test Plan (Solution Test and UAT etc.) | Qualitative Score | 1 |
| Data Migration Plan | Qualitative Score | 2 |
| Documentation Plan (Business BluePrint, Technical specification, Codebook, Test case, Test Script, UAT doc, User Manual, Fit Gap Analysis Report, Online Manual, Training Manual) | Qualitative Score | 2 |
| Project Management Methodology | Qualitative Score | 2 |
| Technical Training Plan | Qualitative Score | 1 |
| End-user Training Plan | Qualitative Score | 1 |
| (a) Support Plan Considering onsite and offsite support. Detail plan with support level by severity and time-bound  (b) Response time (according to urgency)  (c) Resolution Time (according to urgency) | Qualitative Score  For (a) – 1 Mark  For (b) – 1 Mark  For (c) – 1 Mark | 3 |
| Resource Plan | ***Project Manager****: Project Manager and Peer Project Manager with 10 years’ experience in Microsoft Dynamics implementation with PRINCE2 Practitioner or PMP certification* | Qualitative Score | 2 | 10 |
| ***Functional Team***   * *2 HR consultant with a minimum of 10 years of experience in HR module implementation in Microsoft Dynamics* * *2 Finance consultant with a minimum of 10 years of experience in Finance module implementation in Microsoft Dynamics* * *2 Supply Chain and Facility Management consultant with a minimum of 10 years of experience in SCM and FM module implementation in Microsoft Dynamics* * *2 Research Project Consultant with a minimum of 10 years of experience in Project module implementation in Microsoft Dynamics* | Qualitative Score | 4 |
| ***Technical Team***   * *1 Solution architect and a peer Solution Architect with a minimum of 10 years of experience in Microsoft Dynamics Implementation* * *Minimum 2 Developers for each functional area (HR, Finance, SCM and FM, Research Project) with a minimum of 8 years of experience in Microsoft Dynamics Implementation* * *QA team Composition* * *2 Database Administrator with 8 years of Microsoft SQL server administration experience* * *System Engineers* * *Data Migration Expert with a minimum of 8 years of experience in Microsoft Dynamics Implementation* | Qualitative Score | 4 |
| Product Demonstration & POC (Proof of Concept) | Live demonstration on the following process:  1. Procure to Payment (P2P) 2. Recruitment to Retirement  3. Research Administration (RA) (High Level) | Qualitative Score | 10 | 10 |
| Qualification Questionnaire and Detailed Module & Reports | Confirmation & validation of statement given by the bidder on "Qualification Questionnaire." | Qualitative Score based on Comments/Feedback | 3 | 15 |
| Response in “Detailed Module & Reports” worksheet using Standard (S), Customization (C) | Qualitative Score | 12 |
| 1. **Certification** | SEI-CMMI or Equivalent Certification | Bidder should have SEI-CMMI or Equivalent | SEI-CMMI or Equivalent Certification Level 3 = 1  SEI-CMMI or Equivalent Certification Level 3 > 2  No SEI-CMMI or Equivalent Certification Level 3 = 0 | 2 | 2 |

The bidder must obtain a technical score of 50 per cent or more in each section and 70 per cent (49), or more overall will qualify for the commercial evaluation stage. Failing to secure minimum marks in each section and in overall shall lead to technical rejection of the bid. **Therefore, Bidders who achieve this score or higher will proceed to the commercial bid evaluation.**

**Stage 3: Commercial evaluation:**

After the technical scores have been determined, the financial scores will be ranked. The formulae (method) for determining the Financial Score (FS) shall be as follows:-

FS = 100 X Fm / F

where FS is the financial score; Fm is the lowest priced financial proposal and F is the price of the proposal under consideration

In the final evaluation, proposals will be ranked according to their combined technical and financial scores using the weights given to the Technical Proposal and weight given to the financial score. The bidder(s) achieving the highest combined technical and financial score will be invited for negotiations.

1. **Negotiation**:

icddr,b reserves the right to negotiate the technical and commercial offer with the highest scorer (s) in combined (technical plus commercial) scoring to obtain the best value for money. Negotiations may be held with the selected bidder prior to the award of the contract and negotiation process shall be documented properly.

Bidder will confirm their official negotiator and signatory for who is authorized to represent the bidder in the negotiation of this offer in response to this RFP.

List Names of Authorized signatories:

* + 1. (Name & Designation):
    2. (Name & Designation):

These individuals can be reached at:

Address :

Telephone/Fax :

Email address :

1. **Formal Presentation**

Based upon an evaluation of all of the proposals received, icddr,b may invite the qualified Bidder (s) to make a formal presentation as per mutual convenience prior to the final selection.

**Notification of Intent:**

After successful negotiation, icddr,b will issue ‘Notification of Intent’ to the most competitive bidder(s). Please be advised that this Notification of Intent does NOT constitute the formation of a contract between icddr,b and the [partner organization] unless certain conditions (e.g. formal acceptance, resource commitment, submission of performance guarantee) are fulfilled. The sole purpose of this NOI is icddr,b’s willingness to the acquisition of the service subject to the execution of a valid MSA/Contract and/or issuance of a signed purchase order.

**Master Service Agreement:**

The Master Service Agreement will be the guiding document for the ERP implementation process. The MSA Template is attached as Appendix-D. The signing of the MSA will be considered as the official agreement between icddr,b and the Bidder.

**Acceptance or Rejection**

icddr,b at its sole discretion, reserves the right to either accept or reject any and all proposals. The existence of this request for proposal shall not, in any way, obligate icddr,b to take any action regarding any response submitted by a Bidder to this request.

**Responsibilities as an Independent Contractor**

Any personnel provided by Bidder shall be considered to be personnel or agents of the Bidder. Under no circumstances, will said personnel to be considered to be agents or personnel of icddr,b. However, icddr,b reserves the right to demand the removal and potential replacement of anyone or group of individuals provided by Bidder to work on the project.

If your organization intends to utilize a third-party organization to perform any of the tasks associated with any aspect of the proposal, this intent must be disclosed as part of the proposal. For example, if it is your intent to have an organization other than your own perform implementation and project management services as part of the proposed engagement, you must indicate this as part of the proposal. In addition, responsibility for any items or activities provided by any subcontracting or third party entity must be assumed by your organization. For purposes of this engagement, icddr,b intends to contract exclusively with your organization for the support functions required to ensure a successful implementation. This means that your organization will be the sole contact concerning contractual matters, invoicing and associated payments.

**Staffing**

As part of this engagement, it is assumed that your organization will assign project personnel that possess the necessary skills to make significant contributions to the completion of the project. Which personnel are assigned to the project shall be completely at the discretion of your organization. However, icddr,b reserves the right to require the Bidder to remove and possibly replace personnel who are not meeting expectations or who do not interact in a positive manner with other project personnel.

**Insurance**

In order to provide services to icddr,b, your organization must maintain the Worker’s Compensation and Employer’s Liability Insurance in accordance with the applicable laws of the state in which the contractor is obligated to pay compensation to employees engaged in the performance of the work.

This policy shall be endorsed to cover the contractual liability assumed by the contractor under the indemnity agreement set forth below. If any of the work is sub-contracted, independent contractor’s liability providing coverage in connection with such portion of the work, which may be sub-contracted, broad form property damage liability, and personal injury liability.

**Liquidated Damages:**

The Liquidated Damages will be counted as 0.10 per cent of the Contract Price per day of delay of Completion of the Services. The maximum amount of the Liquidated Damages for the whole Contract is a maximum of 10% (ten per cent) of the Total Contract Price.

**ERP Infrastructure Requirements**

As part of this proposal, the Bidder will be required to submit a quote for Server operating systems, Database Management Systems and other infrastructure requirements to smooth running of MS Dynamics 365. The various configurations are defined in the spreadsheet ***ERP Module Details & Questionaire.xlsx, APPENDIX B***  *(ERP Infra Requirements sheet)* which accompanies this document. We understand that this may not be the operating environment which is ultimately chosen. However, in order to provide a direct comparison between the various Bidder proposals, it is important that the specified configurations be quoted. Unless specifically stated, you can choose any Bidder you want for the equipment, so long as the quoted equipment meets the stated specifications.

icddr,b reserves the right to purchase any and all required operating systems, database, and infrastructure-related hardware, software and services from a Bidder of its choice. Awarding of the business for the ERP system to a given Bidder should not be construed as an award for procurement of the hardware and associated services from that Bidder.

**Intent to bid**

Unless required by the action of a court of law, Bidder agrees that all material which has and will be disclosed regarding icddr,b its donors, programs, suppliers, activities finances, and the like are the confidential and proprietary information of icddr,b. As such, Bidder agrees to maintain the confidentiality of this information. In the event that your organization chooses not to respond to this RFP, all material provided within this RFP should be immediately returned to the listed icddr,b contact individual.

**Contract Item Costs**

We regard this process as one in which icddr,b will choose a partner to assist it in implementing a new business information system. As such, icddr,b will look to the chosen Bidder to actively and aggressively pursue those practices which will serve to minimize the cost to icddr,b both during implementation and in the future operation of its business. Sub-contracting is not permitted to another provider (unless made under an exceptional arrangement whereby both parties agree) as icddr,b would like to work directly with the chosen partner.

**Price Protection**

The rates for software and services provided by Bidder in response to this RFP must be valid for a period of six (6) months from the date of proposal submission. Furthermore, once a proposal has been accepted, all defined rates for services to be provided under any resulting agreement must be guaranteed at the proposed rate for a period of two (2) years from the date of project initiation.

**Penalty Clause**:

In the event that the offeror is unable to meet conditions for the Purchase Order and the contract in particularly quality & timelines, icddr,b reserves the right to penalize the awardee. The Liquidated Damages will be counted as 0.10 per cent of the Contract Price per day of delay of Completion of the Services. The maximum amount of the Liquidated Damages for the whole Contract is a maximum of 10% (ten per cent) of the Total Contract Price.

If the awardee is unable to comply with the Purchase Order & Contract within the agreed timeline, in addition to the Liquidated Damages, the Purchaser reserves the right to cancel the Purchase Order and forfeit the contract performance security.

****SECTION 2: SCOPE OF THE BID****

# SCOPE OF THE RFP

This RFP is a solicitation for information regarding the purchase, implementation, and maintenance of an ERP software system. As such, our objectives are as follows:

* Identify the software product that has the best “out of the box” fit to our defined business requirements for a new business information system accessed through a quantitative features and function evaluation process.
* Identify the organization which we feel will represent the best “partner” for our organization in implementing a new business information system by conducting quantitative interviews with current customers.
* Utilize the core business processes inherent within the chosen software to provide the basis for changing our existing internal business processes.
* Purchase and implement new software, including re-engineering of the necessary business processes to be in line with the processes of the new system.

As you prepare your proposal, it is also important for you to understand that it is our objective to have the option of operating independently of the software supplier at some point in the future, should we desire to do so. This would include the ability to add new sub-systems onto the existing application as well as (potentially) customizing the application itself.

**Product Software Pricing**

This section of your response should define the detail of how you define the price for your product. It should include the price to purchase the software as well as any costs associated with the installation of the software and training of both users and technical personnel in the use, operation, and maintenance of the proposed product(s). Software license costs should be provided with no restrictions on the number of installations of the application within our organization in consideration of 5,000 staff numbers.

Also, the Bidder should include any costs associated with other products (integration tools, development tools, operating system software, database etc.) that you believe are required in order to implement and efficiently operate the new business information system.

The warranty period associated with the software should also be defined within this section. Make sure to specify not only the duration of the warranty period but also the relationship between the warranty period and the onset of a maintenance and support agreement.

**Project Management**

The activities to be provided by the Bidder’s project manager shall include the following:

* Development of an overall implementation strategy
* Development of technical standards for modifications, security, conversion, and system administration for all modules
* Development of a comprehensive implementation plan, including the allocation of needed resources
* Project timeline, staging and scheduling
* Task management and tracking
* Project meetings and documentation

**Mentoring technical staff**

As part of the implementation process, we would like our technical personnel to become familiar with the application in the following areas:

* Application programming, including but not limited to development tools, utilities, queries, interfaces etc.
* System and infrastructure administration especially in the initial stages of testing and implementation
* Database and application administration, during the initial stages of implementation and subsequent performance tuning later in the implementation
* Workflow report and application customization if applicable.
* Release management support

**Functional expertise**

Vendor’s functional experts should do the following:

* Review all the feedback collected by icddr,b team from the process owners/stakeholders to understand the holistic need
* Gap analysis between existing processes and standard best-practise processes supported by any benchmarked ERP of global standard with documentation.
* Identify the areas where features of the ERP of the global standard can be used better to map the business processes.
* Risk Analysis and mitigation plan supported with documentation.
* Determine segregation of duties and degree of redundancy of processes/tasks.
* Identify the extent of automation and manual data capturing with a gap analysis in existing ERP Navision.
* Based on the comparison from gap analysis, risk analysis, process identification and integration; prepare a report on % of customization needed, % of automation/dynamism required.
* Review the identified the IT Infrastructure capability prepared by icddr,b internal team and suggest component-based capacity (RAM, CPU, IO, SDD speed, bandwidth, etc.) .

In order to continue with process improvement exercises after the completion of the implementation, our personnel must develop knowledge in these areas:

* Assistance and guidance with the development of the business rules and applying them to the software
* Fit and gap analysis and systems analysis
* Assistance in the development of data interfaces to/from external entities
* Assistance in the conversion of existing data

**Optional Services**

In addition to the standard items listed above, we may need assistance in a variety of other areas. These may include, but will not necessarily be limited to, the following:

* Where needed and justified, customized design and programming for supported modifications
* Any other implementation support required for the on time, on budget, and successful completion of the project

**Customer Base and References**

Provide a list of references that you have been contracted for the same or similar services. icddr,b may contact these references during the selection process as part of the due diligence . Please fill up the Excel file **Form 3A:** **ERP Implementation Project Information.xlsx**. The identified customers should be willing to answer questions concerning your company's performance and services.

**Pricing Structure**

All pricing information should reflect a five (5) year cost. Show costs for each of the five years for each cost element, as well as a total five-year cost of ownership.

**Product Software Pricing**

In this section, please define the pricing structure for the associated software costs, which includes license fees or other pricing methods, and other required features such as maintenance, upgrades, consultation and support fees, and post-implementation training costs and services. Identify a breakdown of the pricing elements over the life of the contract.

**Implementation & Consulting Costs**

Since icddr,b intends to utilize the selected software supplier heavily throughout the implementation process; costs associated with the implementation are expected to represent a significant fraction of the total cost. Please make sure that your cost is both reasonable and verifiable.

**Infrastructure Pricing**

icddr,b is currently operating VMware based HCI in both their DC and DR with adequate resources. Bidders are requested to provide the VM sizing for the ERP infrastructure with the high-level design of the proposed solution considering high availability (DC and DR). For details, please check the spreadsheet (***APPENDIX B :***ERP Module Details & Questionaire.xlsx)

**Implementation Services**

**Methodology**

In this section, we ask that you provide information regarding the implementation methodology of your organization will utilize. This should be framed in terms of the various stages associated with the implementation (e.g., process definition, assessment, build, UAT, deployment, release management, training, post-implementation support including SLA, Annual Maintenance Contract etc.). In addition, you should identify the tools which your organization will utilize for maintaining the project schedule and required resources.

**Technology Transfer**

As part of the implementation process, it is the hope of icddr,b that its existing information systems personnel can gain significant expertise in both the technology used by the application as well as the inner workings of the application itself. Within this section, please identify the steps involved in getting our IT personnel and functional experts familiar with all aspects of your application. This should include any recommendations which your organization might have regarding training programs.

**Documentation**

In this section, you should define the type of documentation that is available within your system. Specifically, is there on-line documentation at both the screen and field level? Is there a data dictionary available for the system? To what extent can icddr,b modify the help text? Are data flow and process flow diagrams available? Is the software user manual along with application administration and database administration SOP available? Are the module and submodule wise detail functional document available? Are system (HW) and infrastructure including back up restoration SOP available?

**Data Migration**

This section should define the approach you plan to take relative to the migration of existing icddr,b data to the new system.

This should include:

* Database analysis and data mapping
* Conversion program writing
* Data integrity checking and audit methodology
* Post-conversion cleanup
* Methodologies used to keep data in sync between the new and legacy systems during implementation

**Project Management**

icddr,b will assign an internal project manager who will be responsible for the overall project management of this process. The icddr,b designated individual, in consultation with the selected bidder Project Manager(s) will provide the oversight to ensure the successful implementation of the system. This will include the necessary scheduling of icddr,b resources to ensure their availability at the appropriate time throughout the duration of the project.

**icddr,b Resources**

Within this section, we ask that you identify the recommended resources (both technical and functional user areas) that icddr,b should consider for the successful completion of this project.

This should include:

* By job category, the number and percentage of dedicated full-time employees (FTE’s) for all icddr,b employees recommended for this project.
* The minimum and optimum recommended resources
* A comprehensive organizational chart and anticipated team reporting structure reflecting both bidder and icddr,b staffing
* Identify the physical resources needed and any other requirements of icddr,b

**Technology**

Define the technology platform(s) used by the proposed solution.

This should include:

The application development environment

* The database(s) supported
* Database server operating system(s) supported
* Client or end-user operating system(s) supported and plug-in (like browser or apps for mobile device)
* Network environment(s) supported
* Complete hardware (Servers, Storages, network equipment, load balancer etc.)
* Required component-based capacity (RAM, CPU, IO, SDD speed, bandwidth etc.)

**Mode of payment:**

Licensing cost: progress payment shall be made as follows:

|  |  |  |
| --- | --- | --- |
| Milestone 1 | At the initiation phase: No. of licenses required for development and UAT | 30% |
| Milestone 2 | **At the go-live phase:** Rest of the licenses | 70% |

Implementation cost: progress payment shall be made as follows:

|  |  |  |
| --- | --- | --- |
| Milestone 1 | **Completion and signoff Assessment** (System Requirement Study, System Analysis report including above-mentioned study detail documentation) | 20% |
| Milestone 2 | Customization & Build and User Acceptance Test Signoff | 40% |
| Milestone 3 | Data Migration and Deployment | 20% |
| Milestone 4 | Training and Documentation (Technical, Online Manual, Training Manual) | 20% |

**Invoicing**

icddr,b’s standard payment term is net 30 days. Make sure to identify any differences between payment terms and conditions associated with software purchases compared to implementation services, hardware. Within this section, also define any “acceptance” period during which icddr,b has the opportunity to exercise the software and receive a full refund on software payments made in the event that the software does not perform as specified during the sales process.

**CONFLICT OF INTEREST:**

The bidder shall not receive any remuneration in connection with the assignment except as provided in the contract. The firm shall not engage in consulting or other activities that could potentially result in a conflict of interest.

**ANTI-CORRUPTION CLAUSE:**

No offer, gift or payment, consideration or benefit of any kind, which constitutes an illegal or corrupt practice, has or will be made to anyone, either directly or indirectly, as an inducement or reward for the award or execution of this contract. Any such practice will be grounds for terminating this contract or taking any other corrective action as required. A breach of this clause shall be deemed a material breach of the agreement entitling icddr,b to terminate the contract immediately.

**CONFIDENTIALITY AND OWNERSHIP:**

The bidder and staff members shall be held responsible for maintaining the confidentiality of any information obtained in connection with and also prior to the review.

Submission of the proposal indicates acceptance by the firm of the conditions contained in this request for proposal, unless clearly and specifically noted in the proposal submitted and confirmed in the letter of engagement. icddr,b reserves the right to request additional information and to reject any and all proposals submitted.

All documents (including the soft-copies) submitted related to this bid, will remain under the ownership of icddr,b.

**Anti-Terrorism**

icddr,b does not engage in transactions with, or provide resources or support to, individuals and organizations associated with terrorism including those individuals or entities that appear on the Specially Designated Nationals and Blocked Persons List maintained by the US Treasury.

* (online: http://www.treasury.gov/resourcecenter/sanctions/SDNList/Pages/default.aspx) or the
* <https://sam.gov/SAM/>
* United Nations [Security designation list

(online:http://www.un.org/sc/committees/1267/aq\_sanctions\_list.sht ml)\

This provision must be included in all part of MSA, including any sub-awards or contracts issued under this bid.

# 

SECTION 3: APPENDIX AND FORMS

# Appendices:

|  |  |  |
| --- | --- | --- |
| **SL. No.** | **Description:** | **Attachment:** |
| 1 | ERP Scope of Work (SoW, APPENDIX A) |  |
| 2. | ERP Module Details & Questionnaire (APPENDIX B) |  |
| 3. | Forms and Formats (APPENDIX C) | |
|  | * 1. Cover Letter |  |
|  | * 1. Bidder’s General Information |  |
|  | * 1. Mandatory eligibility criteria assessment |  |
|  | * 1. ERP Implementation Project Information (Excel Form) |  |
|  | * 1. Financial Capability Information |  |
|  | * 1. OEM Authorization |  |
|  | * 1. OEM Undertaking |  |
|  | * 1. Non-malicious Code certificate |  |
|  | * 1. CMMI Certification and Details |  |
|  | * 1. Personnel details |  |
|  | * 1. Conflict of Interest |  |
|  | * 1. Commercial Proposal Template |  |
|  | * 1. Performance Guarantee template |  |
|  | * 1. NDA Form |  |
| 4. | Finance and IT Requirement Document |  |
| 5. | Master Service Agreement Template (APPENDIX D) |  |