

Final

**Proposal for Implementation of ERP Solution at GIK
(ODOO Based Enterprise Version)**

GIK Institute invites bids for the implementation of ERP Solution (ODOO Based Enterprise Version) from local/international companies having relevant experience under Single Stage-Two separate envelope bidding process. Modules/details can be viewed from the GIK website. The proposal must be submitted by December 23, 2019 at 1500 Hours at the Institute and will be opened at 1530 Hours on the same date.

The contract will be awarded to a firm(s) as per the Award of Contract Criteria mentioned in the RFP document, which can be downloaded from www.giki.edu.pk.

ERP Project is to be completed in 90 days (or as mutually agreed considering the scope of work) from the date of award of the contract. The pay order for the tender fee of Rs. 2000/- and bid security at the rate of 2% of the bid price should be submitted with the proposals, which should be addressed to:

**Deputy Director, Procurement Department, GIK
Institute, Topi, Swabi (KP)**



Ph: 0938-281026 Ext. 2213, Email: procurement@giki.edu.pk

GHULAM ISHAQ KHAN (GIK) INSTITUTE OF ENGINEERING SCIENCES & TECHNOLOGY, TOPI, SWABI.



Request for Proposals

Procurement of consultancy services for Odoo based Enterprise Resource Planning (ERP) for acquisition and implementation

Procurement Ref: No	
Date & Time	December 23, 2019 at 1500 Hrs
Venue	GIK Institute Topi, Swabi

Published on 4th December, 2019

**REQUEST FOR PROPOSALS FOR THE ODOO BASED ERP SOLUTION
(ENTERPRISE VERSION)**

Table of Contents

1. PROJECT OVERVIEW
2. GENERAL REQUIREMENTS AND INFORMATION
3. THE GIK INSTITUTE
4. TERMS OF REFERENCE
 - 4.1 OBJECTIVES AND BACKGROUND
 - 4.2 SCOPE OF WORK
 - 4.3 PROJECT METHODOLOGY
 - 4.4 PROJECT SCHEDULE / TIMELINE
 - 4.5 ELIGIBILITY CRITERIA
 - 4.6 PROPOSAL REQUIREMENTS
 - 4.7 AVAILABLE BUDGET/CONTRACT
 - 4.8 BID SECURITY
 - 4.9 PERFORMANCE GUARANTEE
 - 4.10 AWARD CRITERIA
 - 4.11 SELECTION CRITERIA

1 PROJECT OVERVIEW

GIK Institute of Engineering Sciences & Technology is requesting proposals from qualified firms to provide ODOO based Enterprise Resource Planning (ERP) Solution (Enterprise Version), for Financial Management, Procurement & Stores Management and as detailed below 3.2 (c) iv. Qualified firm should have strong understanding of ERP packages (preferably odoo) and extensive experience with academic institutions of large size.

2 GENERAL REQUIREMENTS AND INFORMATION

For a Vendor to be considered, GIK must receive four (4) copies of the proposal by 15:00 hours by December 23, 2019 at the following address:

GIK Institute of Engineering Sciences & Technology, Procurement Department, Topi, Swabi, Khyber Pakhtunkhwa Pakistan.

Please send one printable and searchable PDF copy of Technical Proposal simultaneously via email to the following email addresses:

procurement@giki.edu.pk

The pre bid meeting and opening of technical proposals will be held at the H.U. Beg Conference Room in Admin Block, GIK, Topi on the same date after 30 mins of receipt of proposals.

All proposals complete in all respects and properly sealed and on prescribed form must be clearly marked separately for both technical and financial proposals: "Sealed TECHNICAL / FINANCIAL Proposal – Enterprise Resource Planning (ERP) Odoo Based (Enterprise Version)." Sealed Technical and Financial proposals should be submitted in two separate envelopes placed and sealed in one big envelope (as per single stage – two envelopes bidding procedure). The bid should contain all the relevant information and desired enclosures in the prescribed format along with Earnest Money equivalent to 2% of the total cost of offered bid price. Each copy of the bid should be a complete document with Index & page numbering and should be bound as a volume. Different copies must be bound separately.

There is no expressed or implied obligation for the GIK to reimburse responding vendors for any expenses incurred in preparing proposals in response to this request.

GIK reserves the right to retain all proposals submitted, and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Vendor of the conditions contained in this request for proposal, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between GIK and the Vendor selected.

3 THE GIK Institute of Engineering Sciences & Technology

The Ghulam Ishaq Khan Institute of Engineering Sciences and Technology (GIK) is one of the most prestigious engineering institutes of Pakistan. GIK is known the world over for setting a standard of excellence in the field of engineering sciences. Over the years, the institute has produced bright, innovative graduates employed at some of the most respectable firms all over the world. It is autonomous and independently chartered university and is predominantly funded by the private sector. It strives to attract faculty of outstanding talent and ability to provide the students a supporting and enabling environment. It hopes to produce graduates who distinguish themselves by their professional competence, humanistic outlook and ethical rectitude, pragmatic approach to problem-solving, and organizational and managerial skills. Given these attributes, they should be able to respond adequately to the needs of Pakistan and be the vanguard of its techno-industrial transformation.

Today, businesses all around the world are increasing their reliance on ERP systems as a cost efficient alternative to other software applications in view of tremendous benefits of ERP being administered by organizations for their businesses effectively using latest technology. It believes that ERP would incorporate every aspect of the business's operation into an easy-to-use system and provide the Institute with a solid foundation, incorporating and covering all fundamental aspects of running the center of excellence like GIK for automating the Manual processes for running it more efficiently, service improvement, competitive advantage and other gains; including efficient reporting system as a means for enhancing and evaluating the performance of the entire system.

GIK Institute, being fully conscious of automation of its entire processes for reaping the such benefits and in order to better align itself with stakeholders and students' for better meeting their expectations, has embarked upon an ambitious plan to introduce a robust and well integrated software and desires to procure a State-of-the Art and open source solution to automate the entire realm of its business processes.

It is widely believed that ERP solutions play an important role in operating, designing, and planning the academic resources and implementation of such systems can help enhance the efficiency of different education processes. The Institutes has opted for seeking services for development and implementation of Application through Enterprise Resource Planning on popular educational open source platform by incorporate global best practices and streamlining the processes for efficiency as well as improvement of Institutes world ranking. This project has been conceived in this background and also evaluating other perceived outcomes of technological solutions in the modern era.

The GIK Institute basically intends to procure an odoo based off-the-shelf, web based and scalable Enterprise Resource Planning (ERP), at its Campus in Topi, District Swabi with the major deliverables such as;

- (1) Conduct Gap Analysis for system/ modules
- (2) Configure software as per the GIK requirements
- (3) Installation and deployment of software
- (4) Training and Users Acceptance Test of the Software Application
- (5) Implementation and live run of the Software Application
- (6) Technical support services up-to one year

4 TERMS OF REFERENCE

4.1 Objectives and Background

The purpose of this project is to identify and select a professional firm with proven experience in Enterprise Resource Planning implementation projects, preferably ODOO based. The VENDOR will conduct a comprehensive needs assessment, develop and manage the RFP process, and provide assistance with the selection of an ERP Software and adequate solution for the GIK's ERP system. The required services (in terms of implementation) and performance conditions are described in the Scope of Services below.

The GIK's objective for this project include:

- (a) Selecting & Implementing Odoo based organization wide, robust, comprehensive and well integrated ERP Solution for its entire Admin and Finance related services including the modules mentioned at para 3.2 – (c) iv. below at the most competitive terms & conditions.

For this purpose, GIK may require establishment of project office in or around the campus.

4.2 SCOPE OF WORK

The Vendor will review relevant documentation to obtain background information on the current manual processes and desired ERP environment to identify key strategic options and recommendations. Project tasks shall include, but are not necessarily limited to, the following items. The proposal should include a sufficient level of detail on each task. If the Vendor feels that additional tasks are warranted/customized, they must be clearly identified in the proposal.

Deliverables: In addition to the actual deployment/ implementation of ERP solution at the GIK Institute, following deliverables are expected from this project:

- i. Software modeling
- ii. Project Governance including a project plan for the project execution
- iii. Requirements Specification Document(s) and their sign-offs

iv. Gap identification document(s) and their sign-offs

1. Modules based on Requirements Specification and Gap Analysis

v. User Guides and Training Manuals as per business processes designed for GIK

vi. License keys of the software solution and all its components as to meet all the functional requirements

vii. Installation, configuration, customization, and integration covering the scope of the project

viii. Procedures for User Acceptance Test(s)

ix. System's documentation in the form of installation and configuration guides, end- users and administration manuals etc.

x. Simultaneously Data Entry for the entire ERP for the initial One Year.

xi. Change Management

The proposal will not be limited to above points but also it will discuss:

- (a) Work and meet with GIK's relevant departments staff to refine the scope, purpose, uses and goals of the Institute's ERP Selection to ensure that the solution is both adequate and appropriate to meet the Institute's needs. Review project schedules and answer any questions pertaining to the review of the scope defined in this RFP. The proposal shall fully identify and describe the Institute's expectations for this project and provide an adequate solution.
- (b) Develop an **ERP Needs Assessment Report (Pre – Implementation)**, including, but not limited to, the following major components:
 - (i) Off the shelf ERP (based on odoo Enterprise Version) software with licenses, solution implementation, including configuration, customization and integration with other Applications.
 - (ii) Identify effectiveness, weaknesses or inefficiencies of the current process and existing system in meeting the business needs of the Institute. Offer options and alternatives for the Institute to consider and whether they would allow responding quickly and cost-effectively to changing business and technical needs.
 - (iii) Evaluate the pros and cons of the current system hardware (servers, backup appliance and firewall); propose opportunities and equipment for improvement, wherever needed.
 - (iv) Benchmark project budget, support and on-going maintenance costs to similar-sized academic entities immediately and in medium term.
 - (v) Assist the Institute in developing a refreshed vision for the Institute's ERP and business-related technology strategies and paper less system for both the current- and long- term as they relate to financial management, procurement tracking, student life Inventory and Fixed Assets, HR management, Project Management, Monitoring & Evaluation System, including the following;

1. Procurement
 2. Budget & Finance
 3. HR Management
 4. Project Management
 5. Customer Relation Management for various stake holders including Faculty, Students, Alumni, Parents, HEC, PEC, SOPREST, vendors, etc.
 6. Maintenance & Works
 7. Dashboard Management
 8. Facilitation & Administration
 - a. Hostel Management
 - b. Fleet Management
 - c. Mess & Café Management
 - d. Events Management
 - e. Stores and Inventory Management
- (c) Prepare and deliver presentation to the ERP project management team and Institute management to facilitate their understanding of the ERP and implications for the Institute.
- (d) Propose ERP solution with service level. This should include any current service areas, as well as areas of needs, including cost analysis, initial, ongoing, maintenance and support/training) for 4-5 years.
- (e) Proposal should include clear timeframe for implementation, including time to make necessary adjustments/debugging/troubleshooting. The RFP should include any current service areas, as well as areas of needs. This detailed comparison should include, but is not limited to, Hardware, Software, services, infrastructure (Hardware, Hoisting, Networking, Data Center, Disaster Recovery, Backups, Security, etc.), flexibility, ease of customization, etc. Service levels, support (internal and external), hoisting, scalability, availability, performance and day-to-day performance (speed/user experience) of main use-cases should be among the elements covered.**
- (f) Vendor shall undergo a comprehensive contract agreement with the Institute.
- (g) Proposal will include the very need that arose to defend Institute's records requests, audits, or other challenges.
- (h) Proposal will encompass any need during time of ERP development, implementation and Trial, as per mutually decided approach the client reserves the right for any addition, alteration in ToR/Scope of the project that will require to provide support and address all issues raised up.

4.3 Project Methodology

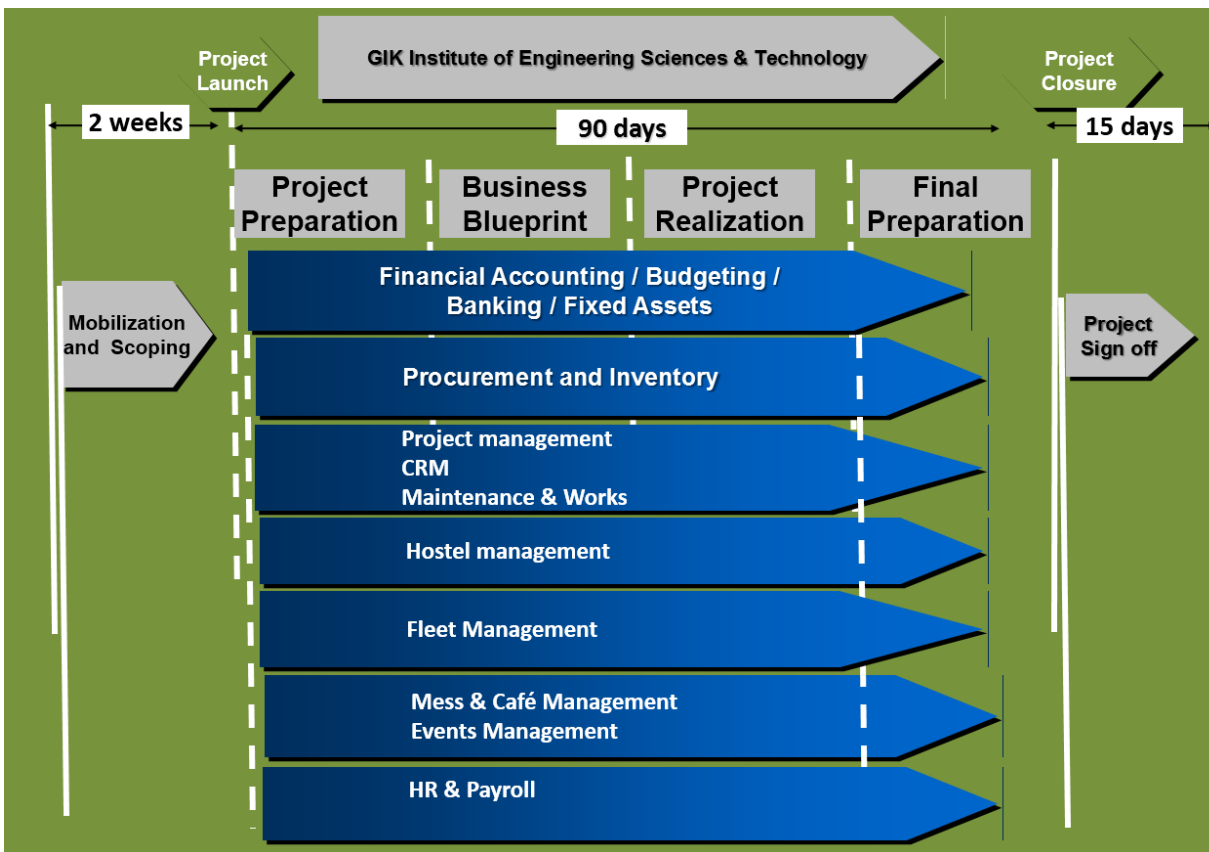
The successful firm in the tender process will be required to implement the solution for the

GIK Institute. The solution being sought will primarily be off-the-shelf Enterprise Level solution in which the core components of ERP shall be only configured as per the requirements. However, in order to meet the complete requirements as laid out in this RFP, SRS or as subsequently required by the GIK Institute, selected bidder may be allowed for desired customization and/ or development. Other than the core components of ERP, selected bidder is encouraged to propose Free-and-Open-Source modules/Applications which is fully integrated with the core odoo ERP while taking all the responsibility of enterprise-wide integration services in the proposed automated environment.

4.4 PROJECT SCHEDULE / TIMELINE

The following is a tentative time schedule related to the requested ERP Needs Assessment project:

Project Timelines (TENTATIVE) Odoo Enterprise Solution



4.5 ELIGIBILITY CRITERIA

This RFP is open to reputed IT firms/ Odoo system Implementers registered with **Income Tax and Sales Tax Departments, who are on Active Taxpayer List of FBR**, Government of Pakistan for supply and provisioning of such services.

Bidders shall not be under a declaration of ineligibility for corrupt and fraudulent practices.

2% bid security must be attached by the bidder along with their financial proposals, the proposals will be consider invalid, in case the bid security is not attached.

4.6 PROPOSAL REQUIREMENTS

The Proposal should include the minimum information requested below in the order listed. Emphasis should be on completeness and clarity of content. Please do not include sales and marketing brochures. Additional information, if provided, should be separately identified in the proposal.

(a) **Section One – Transmittal Letter**

- A covering letter signed by the owner or an official specifically authorized to solicit business and enter into contracts for the Vendor. The covering letter should introduce the firm and summarize general qualifications, including the firm's legal entity name, address, email address, phone number of contact person, and short synopsis of the proposal and credentials to deliver the services sought under the RFP.

(b) **Section Two – Experience and Qualifications**

- (i) A description summarizing the Vendor's experience over the past five years in performing similar services as listed in this RFP, particularly pertaining to educational institutions giving scope of work, project, timelines, year of completion, total project cost and actual services performed. The company shall provide supporting documents. Please include the year, key scope objective(s), and ERP solutions implemented (particularly ODOO based) that vendor's firm recommended and include the names of the Project Manager, team members and their roles and responsibilities in the project.
- (ii) The Technical proposal should demonstrate the bidders' knowledge of project requirements and its understanding of the tasks set forth in the scope/ToRs.
- (iii) Demonstrate Vendor's successful track record in managing ERP processes and system implementation.
- (iv) A statement identifying the names and designation of key personnel that will be assigned to this project, including their titles, length of relevant experience and qualifications (attach as appropriate).

(v) The firm's ability to complete the work specified in this RFP and produces the required products in a timely fashion and the ability to present any necessary reports and recommendations to GIK. This section should contain the description of three (3) successfully completed projects in the last five (5) to seven (7) years, including the name of institution for which work was performed, general description of the scope of work, budget, name and contact information of responsible person for the project.

(c) **Section Three – Outline Strategies and Options**

- Outline methodology, planning and design strategies that will result in the development of recommendations that are practical to the Institute. Include a detailed plan for the services to be provided, implementation plan/Road Map along with deliverables to be provided at each step, with a corresponding timeline, including meetings with Institute staff (Procurement & Finance) etc. The work plan should be consistent with the scope of work presented above, however, the Vendor may suggest changes where appropriate.

(d) **Section Four – References**

- Provide a minimum of two (2) references from two different clients from within the past five (5) years, preferably of a University/Educational Institute similar in size to GIK. Include the entity name and website URL, and title, email address and telephone number for a contact person from each reference, as well as scope of work and project start/end dates.

(e) **Section Five – Estimated Project Timeline and Pricing**

- (i) Provide an estimated project timeline required to conduct a comprehensive ERP needs assessment. Provide pricing estimates that include planning, development, and delivery services.
- (ii) Project plan indicating schedule for each activity, milestone, and deliverable.
- (iii) The proposal shall be inclusive of all applicable taxes and should include all costs (direct or otherwise), overheads and contingencies and there will be no additional payment admissible on part of the Institute.

4.7 Available Budget/Contract

Selected prospective solution implementer may be asked to participate in negotiations with the institute and execute a contract.

Any observation on ToRs must be brought to the notice of GIK at least three days before filing of bids. The Institute reserves the right to reject all proposals without assigning any reason. The bidder shall provide undertaking that:

- Key staff should not be substantially employed in other projects during currency of the assignment and any violation may lead to termination of project.
- The client reserves right to execute delayed work at bidders 'risk and cost.

4.8 Bid Security

- (a) The Bidder shall furnish, as part of its bid, a bid security of 2% of the total bid price.
- (b) The bid security is required to protect the Purchaser against the risk of Bidder's conduct which would warrant the security's forfeiture.
- (c) Any bid not secured, will be rejected by the Purchaser as nonresponsive.
- (d) Unsuccessful bidders' bid securities will be discharged or returned as promptly as possible.
- (e) The successful Bidder's bid security will be discharged upon the Bidder signing the contract and furnishing the Performance Security guarantee or on completion of the contract.
- (f) The bid security may be forfeited:
 - If a Bidder:
 - (i) withdraws its bid during the period of bid validity specified by the Bidder, or
 - (ii) does not accept the correction of errors; or
 - (iii) in the case of a successful Bidder, if the Bidder fails:
 - to sign the contract; or
 - To furnish performance security or complete the job as per agreed schedule.

4.9 PERFORMANE GURANTTEE

The supplier whose quotation is accepted will be required to submit a performance bond in the form of bank guarantee as a professional liability issued by the first class recognized bank, the amount of which will be not less than ten percent (10%) of the total contract amount to guarantee faithful performance and completion of the Agreement. If the Contractor fails for any reason to execute the Agreement, the said bond will be forfeited to GIK. The performance bond shall remain in effect for six (06) months from the date of issuance.

The Bid Security submitted by the bidder at the time of submitting its bid shall be returned to the Bidder upon submission of Performance Guarantee.

Failure to provide a Performance Guarantee by the Bidder is a sufficient ground for annulment of the award and forfeiture of Bid Security. In such event GIK as procurement agency, may award the contract to the next lowest evaluated bidder or call for new bids, as deemed appropriate by the Institute.

4.10 AWARD CRITERIA

As per the prevailing procurement rules of GIK read with this document.

4.11 SELECTION CRITERIA

A single stage two envelope procedure will be applied for evaluation of the proposals, with evaluation of the Technical Proposal to be completed prior to any financial proposal being opened and compared. Only those financial proposals of the Vendors will be considered for opening that score at least 60% marks in technical evaluation.

The selection process shall be based on the received bids. The process may include discussion and clarification thorough any mean as notified. Criteria for evaluation shall include:

Factors	Total Marks
ERP Expertise & Clientele of the Firm submitting Proposal 0-2 Years = 5 2-5 Years = 10 6-10= 15 Relevant large academic institution Odoo ERP implementation experience = 15	30
Proposed Work Plan and Approach	15
List of personnel & their qualification and experience	15
Completeness of PROPOSAL REQUIREMENTS as per the document	20
Number of Years the firm has been in practice 0-2 Years = 5 2-5 Years = 10 6 and above = 15	15
Availability of nearest local office (in Islamabad/Peshawar or surroundings)	5
Total	100

The Technical Proposal shall be evaluated on the basis of its responsiveness to the Term of Reference (TORs).

In the Second Stage, the proposals of all solution providers, who have obtained minimum of 50 marks out of 100 in overall evaluation, will be compared. The overall weight-age factor applied to Technical & Financial scoring will be as under:

S. No.	Criteria	Weight-age
1	Technical proposal	60%
2	Financial proposal	40%
	Total	100

4.12 SELECTION PROCESS

Following are the steps/ procedures which will be followed for the Selection of successful bidder.

- i. In first stage, only Technical proposals will be opened in the presence of bidder's representatives who choose to attend.
- ii. Technical evaluation of the firms shall be based on information provided in Technical Proposals.
- iii. As a part of technical evaluation, bidders may be asked to conduct Presentation/ Demonstration/ Proof of Concept.
- iv. On the basis of technical evaluation, the financial proposal of only technically responsive bidders (qualified bidders) will be opened in the presence of their representatives who choose to attend.
- v. Financial proposals of bids found technically non-responsive shall be returned un-opened.
- vi. The bid found highest scorer for the cumulative value of both Technical and financial scores, will be considered for the award of tender.
- vii. After the approval of tender award, a Contract on the stamp shall be executed by the GIK Institute with selected bidder within 15 days from the date of issuance of offer letter.
- viii. For ordering purpose the price evaluation will be done against complete/ whole items.