



DEVELOPMENT THROUGH PARTNERSHIP

**APPOINTMENT OF A MICROSOFT PARTNER TO
PROVIDE APPLICATION DEVELOPMENT,
MAINTENANCE AND SUPPORT OF MICROSOFT CLOUD
SERVICES AND APPLICATIONS FOR A PERIOD OF 36
MONTHS**

VOLUME 3 OF 4: TERMS OF REFERENCE

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1. CLIENT'S / EMPLOYER'S OBJECTIVES

The Construction Industry Development Board (cidb) is a Schedule 3A public entity. The Board comprises of private and public sector individuals appointed by the Minister of Public Works on the basis of their individual knowledge and expertise. It is supported by knowledge – based organization that is committed to the development objectives defined in the cidb Act (Act 38 of 2000).

The cidb mandate is to:

- Provide strategic leadership to construction industry stakeholders developing effective partnership for growth, reform and improvement of the construction sector;
- Promote sustainable growth of the construction industry and the sustainable participation of the emerging sector in the industry;
- Promote improved performance and best practice of public and private sector clients, contractor and other participants in the construction delivery process;
- Promote procurement and delivery management, the uniform application of policy throughout all spheres of government, uniform and ethical standards including a code of conduct;
- Establish the registration of projects and contractors and other suppliers, to systematically regulate and monitor the performance of the industry and its stakeholders for sustainable growth, delivery and empowerment and for improved performance and capability;
- The cidb's operational structure is summarized below. Note that while the individual Business units are presented here, the cidb operates in an integrated and cross-cutting manner.

The cidb has the following Business units:

- Office of the CEO
- Finance
- Information Technology
- Functional Operations
- Corporate services

The purpose of this bid is to appoint a suitably qualified service provider with a Microsoft Gold Partner status (in CRM and FinOps) to provide support for Microsoft cloud services and application services for a period of 36 months.

2. BACKGROUND

CIDB embarked on applications and infrastructure modernization project early in 2018 which resulted in a migration of all on premises hardware and software to Microsoft Azure cloud. Our cloud services consist of:

- Office 365,
- SharePoint,
- Exchange Online
- Azure AD
- Azure SQL
- Dynamics D365 Customer Engagement (CE).
- Dynamics D365 Finance and Operations (FO).
- Kofax Scanning Server and Workflows.
- Web based Grade 1 Online registration.
- Application development, testing and production platform on Azure.
- SharePoint for Intranet, scanning, other web-based applications
- Cloud integration of SharePoint (ROP), D365 CE, FO, Kofax and National Treasury CSD database.
- Other operational APIs.

3. DESCRIPTION OF THE SERVICES

The maintenance and support services relate to all Microsoft products used by cidb at the level of back-end hardware and software as provisioned on Azure cloud platform. The end-user support issues are excluded because they are handled by the internal desktop support team, however a limited support to the IT team may be required as when the need arises.

Regarding Dynamics ERP and web applications, the bidder will provide both software maintenance and support up to end user level via the appropriate call logging platform. The bidder may recommend ways to define the boundaries of the end-user issues that may overlap with the desktop and the application support space. To a large extent, the end-user incidents remain out of scope for this bid.

This bid is open only to Microsoft products and solutions partners who are accredited to support products in the following categories:

- Azure Cloud Services for Infrastructure as a service
- Microsoft Office 365,
- Dynamics 365 ERP Application Support
- Enterprise Mobility Security support.
- Exchange online Support
- Azure Active Directory support
- SharePoint support
- Modernisation and digital engagement services
- Business Solutions and Process Engineering.

3.1 Back-office support services

The back-end support services shall include all collaboration services on O365, Systems backups, disaster recovery plans and Azure infrastructure support.

3.1.1 Back-up services shall entail:

- Ensure cloud databases are supported and recoverable from corruption.
- Ensure health checks on databases including periodical provision of logs for review.
- Ensure application files are backed up.
- Ensure user data is backed up.
- Ensure backups are as per Cidb policies.

Deliverables:

- (i) Summary report of all backups as per global and cidb policy
- (ii) Setup platform to monitor and report on backups iii) provide database logs for monthly reviews.

3.1.2 Disaster recovery services entails:

- Investigate and resolve recovery of data from corruption events.
- Assist with plans to perform the annual simulation of disaster recovery i.e., provide a copy of application files / database for recovery at the third party or alternatively do live transfer of processing to the secondary side as provided by Azure regions.
- Support business continuity plans i.e., resource availability during invocation of business continuity at the secondary location.

Deliverables:

- (i) Provide recommendations on Azure recovery procedures.
- (ii) Participate in the annual business continuity exercise.

3.1.3 Azure Infrastructure Management services entails:

The service provider shall follow ITSM standards and procedures as documented by Cidb to manage cloud infrastructure, but not limited to:

- Ensuring the provision of infrastructure for new services.
- Ensuring that Infrastructure resources and applications are monitored for availability.
- Perform regular health checks of Azure Platform.
- Monitoring performance of cloud infrastructure resources.
- Managing the capacity of cloud resources to ensure applications run optimally.
- Ensure cost effective use of resources and review usage annually.
- Manage security related issues and events on the Azure platform.

- Ensuring cloud platform changes are communicated and introduced per Microsoft schedule.

Deliverables:

- (i) Approved change requests, resource utilisation reports such as capacity and availability report
- (ii) Major incidents and problem reports.

3.2 Application Development and Support

Cidb has budgeted a certain number of hours per annum for all new application development work and related services according to priorities and funding available for the next 36 months. The order in which development services will be requested will be determined by the business owners. The bucket of hours for development and support work shall remain separated.

These are the high-level application development requirements:

- Development of webservices to be compatible with the cloud technology.
- Implementation of new regulations on best practice scheme and billing.
- Development of Power BI cloud business reporting.
- Automated bank reconciliation and refunds.
- Grade 1-9 online registration.
- Cloud integration of services.
- Development of Learner and Contractor Development system.
- Compliance case management system
- Contractor / Client Case Management System
- Moratorium / change in grading criteria for 3-year renewal development.
- Call centre and CRM integration
- Communication module configuration

Application developments entail the development of new modules of Dynamics 365 or webservices and their major enhancements. The scope includes applications on web services, Kofax, databases and API/integration. Support entails daily monitoring of application performance, management of backups and resolving of application bugs, errors, etc. The team shall:

- Conduct system analysis and project scoping.
- Offer strategic leadership, management, and support of application & databases in production environment.
- Follow modern development methodologies for application lifecycle development and project management for introducing new functionalities.

- Develop enhancements as when required through service request. Enhancements from requests and low impact software maintenance shall be performed as part of systems development while scheduled as a normal change.
- Schedule emergency enhancement due to incidents which requires code/data fix must be attended immediately as part of system maintenance and support. These should be scheduled as emergency changes.
- All fixes will require testing prior to deployment.
- Resolve application related incidents using incident management process.
- Manage the development, production, and testing environment.
- Conduct systems training for application release.
- Manage stabilisation and errors logs post release.
- Ensure necessary resources are provided during project execution.
- Follow agreed application release schedule to introduce functionalities.

Deliverables for development:

- (i) URS
- (ii) Design
- (iii) Development
- (iv) Training
- (v) UAT
- (vi) Change request.
- (vii) Operational reports/dashboards.

Deliverables for application support:

- (i) Maintain integrity of development, training, and testing platform.
- (ii) Manage production and integration environment.
- (iii) Service management reports
- (iv) Backup reports
- (v) Databases logs.

3.3 Service Delivery Management

Service delivery management is a critical function of the contract which will assist in managing the expectations of the parties of the SLA. The purpose is to ensure that cidb processes, policies and procedure are adhered to, in delivering external services. The role must:

- Offer strategic leadership to ensuring healthy relationship with cidb and stakeholders.
- Respond to issues of contract management.
- Provide oversight of service transitioning and support.
- Ensure monthly reporting and review of contract performance.

- Ensure scheduled presentation of invoices according to agreed payment plans.
- Ensure purchase orders are released for services requested.
- Ensure correct level of accountability is applied to change approvals.
- Ensure functional contact channel for request of application and infrastructure support services.
- Provide a tool for logging application related incidents.
- Report incidents open and closed, age analysis, enhancements and application projects status, financial allocation, invoicing, and schedule operations meetings?
- Ensure application incidents are resolved with minimal impact to the organisation.
- Offer Tier 2 escalation for end-user services for application related incidents.
- Offer Tier 2 support for end-user management services relating to the cloud issues e.g., scanning, Kofax server, etc.
- Offer Tier 2 escalation to back-end Microsoft engineers.
- Offer Tier 3 escalation to Microsoft.
- Ensure one (1) hour response and estimated time to resolve for calls logged.
- Provide service coverage of 8 x 5 days.

Expected Deliverables:

- (i) Monthly SLA reports and meetings
- (ii) Contract performance reporting
- (iii) Attend scheduled weekly IT operations meetings.

Expected Tools and Resources:

- (i) Service manager
- (ii) Account manager
- (iii) Incident logging and reporting system
- (iv) Operational Service desk with accessible channels 8x5 days.

3.4 Human resources requirements

- The bidder shall provide all necessary skills to manage the cloud environment and its related technologies.
- Provide resources that understand Azure Solutions and are experienced in maintaining cloud applications and services on Microsoft Azure.
- The resources will be responsible for performance tuning, and monitoring of cidb services on Azure.
- Resumes (CVs) of Azure resources/ DevOps team members must have knowledge of IaaS, DBaaS and general Administration of Azure cloud service.
- The certification of the senior DevOps engineer or Service manager is mandatory.

- The rest of the CVs of team members must be presented in a short format indicating years of relevant experience, certifications, and Academic qualifications.
- The team members must have been vetted by the service provider regarding qualifications and experience.
- The successful bidder must ensure that their team members who are working on Cidb systems have a police clearance certificate.
- Foreign team members must have valid scare skills or general work permit on request.

Expected Deliverables:

- (i) DevOps resources, Azure certified experts (engineers, administrators, and architects), Business analysis and Project Managers.

3.5 Technological Tools to Manage the Services

The service provider is expected to have the required technologies and resources to operate the cloud infrastructure and application performance.

3.6 Contract Transition-out and -in

During contract transitioning out, the outgoing service providers contracted to Cidb will ensure 100% handover of the environment and availability of personnel for onboarding period of at a month.

Expected Deliverables:

- (i) Contract transition work plan
- (ii) Handover report
- (iii) Team resources
- (iv) Open incidents.

3.7 Penalty clauses

Lack of performance on the agreed SLA metrics will attract a performance penalty equivalent to hours of downtime levied on the support value of the services impacted.

4. ROLES AND RESPONSIBILITIES

The service provider is responsible for ensuring the correct skills are provided to support the contract are within their employment. Details of team members working with Cidb

systems and their role in the contract must be provided in the proposal or the SLA. The team members must sign the acknowledgment of Cidb information security policy.

4.1. Service Provider Engagement Model

Normal incidents (application related) from end-users for system support must be logged through IT Sysaid. The service provider will receive incident with Sysaid reference number from IT and contact the user to resolve.

- 4.1.1 Service requests linked to events, alarms and incidents will be logged on Sysaid. IT will request the service provider to continue with the request and report to the end-user.
- 4.1.2 Monthly planned work from the departments will be submitted to the IT manager with the memo approved by the business owner (director) e.g., request for enhancements, management reports, data recons, statutory updates, etc. The IT Manager will grant pre-approval for the change request for the service provider to contact the end-user for further details. The service provider will be sent estimates to the IT manager for approval. Once approved, Cidb will log the change requests on Sysaid. The end-user, the director (business owner) and the IT manager must sign-off the change after testing.
- 4.1.3 Monthly planned maintenance work from the service provider/Microsoft side with estimated hours will be submitted to IT manager for pre-approval. Major platform update will require the service provider to log a change request with IT so that the end-user can assess the impact and make necessary arrangements. Unplanned work linked to events, alarms and emergency procedure will be approved by the IT manager/change committee.
- 4.1.4 All billable activities must have the cidb reference number from Sysaid.
- 4.1.5 Out of scope work shall be provided via cidb's contract management processes.
- 4.1.6 The bidder is bound to create a working relationship with other service providers in the best interest of the cidb.
- 4.1.7 The cidb shall make a final ruling concerning the boundaries for the scope for services contracted within ICT environment.

4.2. Skills Composition

They team complement must include the highlighted roles but not limited to those:

- Account Manager
- Service Manager (Incident, Problem, Release & Change Management)
- Business Architect (Analyst Programmer /Process Engineer)
- Project Manager / IT programme Delivery Lead.

- DevOps Software Engineer / Programmer
- Solution Architect
- Cloud Infrastructure Architect / Administrator
- Security Specialist
- Solution Architect
- Business Intelligence Developer
- Digital Engagement Consultant
- Business Analyst (Trainer)
- Quality Analyst (Tester)

4.2 Responsibility Matrix

| Service | Microsoft | Service Provider | cidb |
|--|---|--|--|
| AD services: Manage user access to resources. | Provide infrastructure availability of at least 99.9% | Customise and Monitor the services, uptime, health checks, capacity, licensing, etc | <ul style="list-style-type: none"> • login to the Access Panel, access applications on the Access Panel and reset passwords. • administrators can create, read, write, and delete entries in the directory or provision or de-provision users to applications in the directory |
| Exchange Services: Provision of email: Email security Availability and capacity. | Provision of exchange online (cloud) services availability of at least 99.9% | <ul style="list-style-type: none"> • Configuration of Exchange • Monitoring of back-end resources/services. • Perform health checks and platform updates. | Manage user accounts. Enforce cidb policies. |
| SharePoint Services: (for CE/FO/Intranet and webservice) | <ul style="list-style-type: none"> • Provision of virtual servers and availability of at least 99.9% | <ul style="list-style-type: none"> • Management of hosting resources • Design and customisation of SharePoint. • Design and customisation of intranet. • Ensure proper security of the platform. | Administration of website and intranet content. |

| Service | Microsoft | Service Provider | cidb |
|---|--|--|---|
| | | <ul style="list-style-type: none"> Provide content management support for communication | |
| M365 Services: OneDrive, Teams, Office 365, Security | Provide email, O366, Teams and OneDrive availability of at least 99.9% | <ul style="list-style-type: none"> Management of resources Design and customisation of Teams Design and customisation of O365 | <ul style="list-style-type: none"> Support users to access services. Delete users. Allocate resources. Technical support Path management |
| Dynamics 365 Customer Engagement (CE) | Provision of CE online (cloud) services for 99.9% availability. | Application support and maintenance. Transaction requiring back-office support. | <ul style="list-style-type: none"> Transacting on the system. Role allocations Approve back-end change requests |
| Dynamics 365 Finance and Operations (FO) | Provision of CE online services. Provide Exchange availability of 99.9 | Application support and maintenance | <ul style="list-style-type: none"> Transacting on the system. Approve back-end change requests. Role allocations |
| Integration Services (web services, FO, CE, and API) | Provision of integration services with availability of 99.9% | Application support and maintenance | Liaise with stakeholders of data or APIs. Approve back-end change requests |
| Database services (Azure SQL) and Power BI reporting | Provision and monitoring of AZURE SQL services. Provide Exchange availability of 99.9% | Database support and maintenance. Customer standard and non-standard reports on the cloud. | Approve back-end requests for data changes through IT change request. |
| Development environment; (Azure hosted dev, test, and training platform) | Ensure virtual machines are available 99.9% | Keep the dev environment up to date and ready for new development. | Ensure proper licencing and resources are adequately provided. |
| Backup and disaster recovery management (Manage fail over services Azure Regions) | Ensure availability of regions for failover. | Ensure data and application files are backed up. Setup failover resources. | Ensure policies and procedures are communicated and applied to the production environment. |

5. APPROVALS

The final document will be submitted to IT Manager for confirmation and Chief Information Officer for review and approval of deliverables.

6. ACCESS TO LAND / BUILDINGS / SITES

During the fieldwork, the successful bidder shall be provided with access control cards for ease of access to the cidb buildings.

The bidder shall be allocated with an office space for the duration of their fieldwork.

7. PLANNING AND PROGRAMMING

The successful tenderer shall present the project plan with timelines during the project initiation meeting and signoff. The requirement to be submitted and agreed upon..