



# **Bidding Document**

## **ENTERPRISE PROJECT MANAGEMENT**

<b>Last Date for Submission:</b>	<b>27<sup>th</sup> August, 2018 at 3:00 P.M.</b>
<b>Tender Opening Date:</b>	<b>27<sup>th</sup> August, 2018 at 3:30 P.M.</b>



## **1. Project Introduction**

BoK intends to procure the services of experienced software houses and IT companies for the supply, installation, implementation and maintenance of Enterprise Project Management (EPM) that should provide all the necessary facilities to run the business of the bank as per best standard practice.

### **1.1. About The Bank of Khyber**

The Bank of Khyber was established in 1991 through Act No. XIV, passed by the Provincial Legislative Assembly of the KHYBER PAKHTUNKHWA Province of Pakistan. It was awarded status of a scheduled bank in September 1994. The Bank of Khyber enjoys a unique position, and stands out amidst the other banks operating within Pakistan, and has the privilege of being bracketed amongst the only three government banks in the country.

## **2. Project Details**

### **2.1. Scope of Work:**

Being a leading organization in the region BoK has always been abreast with technology to provide enhanced services. As a step to enhance the internal and external customer experience, Bok is going to implement EPM to reduce Project Management efforts and costs, getting more functionality, and user friendliness on hand and simple, and easy to use. The implementation will include standards procedures to be used by all Project Managers.

Major goals of this project are as follows:

- Consistent Project Management Processes
- Effective Resource Management
- Better and accurate Reporting Process
- Presence of Project Artefacts Repository

The parameter in the system must be flexible enough to generate future banking products without the request/ change in the program. The availability of this functionality with the user will be preferred. This may include addition of fields, selection of codes etc. along with fulfilling the banking rules and policies.

The system should maintain sets forth the services to be performed related to implementation of enterprise program and project management (EPM) application to support its program and project, planning, budgeting, and reporting processes.

Project Server 2016 is built on Microsoft SharePoint Server 2016. It provides project management, work management, and portfolio management capabilities for the enterprise. With Project Server 2016, organizations can effectively initiate, select, plan and deliver projects while tracking time and budget. Project Server 2016 also provides extensive reporting capabilities through Excel Services in Microsoft SharePoint Server 2016 for reporting on all aspects of the project lifecycle.



## 2.2. Project Requirements / Specifications

#	Requirement	Solution / Comments	Vendor Response
1	Publish a project schedule through MS Project	System should allow publishing of Project schedule via MS Project. The published project schedule should be visible centrally from different locations. Seamless, native integration with MS Project will be required	
2	Centralized Project Management for PMO	Out of the box Project Center to be available which should provide a convenient way for project managers, team members, and other project stakeholders to view detailed information about individual projects. Various Projects and Task level reports and/or views to be available to show visibility within the projects	
3	Home page	Home Page should reflect our branding colors and logo. Additionally, the home page should show various information related to tasks, approvals, risks, issues and projects	
4	Resource Management	A central location shall be provided by the system to capture various types of resources which can be utilized across projects. These resources can be human resources, hardware/software or expenses incurred on projects. An user with relevant permissions should be able to view various resource information such as Resource Availability, Resource Allocations, Resource Assignments and Resource Utilization Views	
5	Enterprise Calendars	Enterprise Calendars will be required to capture the organizational working hours and holidays. These calendars should be utilized within the projects to show the exact working days and timings for any project. There can be more than 1 enterprise calendar for Bank of Khyber	
6	Project Sites	Each project should have a separate site to allow for permissions-based access to Project team members and stake holders to project tasks, documents, risks, issues, deliverables and discussions	
7	Enterprise Project Templates	Enterprise Project Template will be required, so as to have consistent Project Schedules, documents, risks and other artifacts throughout the organization, for similar sort of projects	
8	Projects documents sharing	All projects shall have their workspace (Project Site) where Project Manager & Team Member of the particular project can upload documents that need to be shared among the permissible users	
9	View tasks & updates	A separate My Tasks area is required which will show all the tasks assigned to a user. They should be able to view the task details, and should be able to submit the task progress using the system. System should be able to keep track of all task updates and should be visible to the person and the project manager.	
10	Current Status Calculation	System should be able to provide various views and reports to show the projects' status as of now. The status should be accurate and should reflect various project attributes such as % Complete, Variances, Owner, Schedule, Work and Duration indicators, Project Health and Cost related data	
11	Effort tracking for Projects and Resources	System should be able to provide various views which should be able to reflect efforts consumed via Project or by a specific resource on multiple projects	
12	Super User/Power User	Multiple super users - who can access all docs, reports, dashboards, without any restrictions	



13	Access Rights	Access to information and any document within the system should be strictly controlled via various user roles and groups	
14	Departmental Login	Departmental Logins – possibility to use generic logins which will be defined in Active Directory, and assigned all the projects relevant for that department	
15	Ability to mention “Reason for delay” for delayed projects.	System should be able to provide an area to capture the “Reasons for delay” for a specific project. This information will be manually entered by the Project Manager using MS Project or Web based access	
16	Create issues & updates (Phase1)	Project users, including Project Manager & Team Member, can add, update, assign and delete Issues form the project Site depending on their user permissions.	
17	Email & Alerts	Email alerts shall be provided. These alerts/email intimations shall be configured for Projects, new tasks assignment, change to any task, status reports, due date for tasks and status reports	
18	Milestone Summary Reports	<p>Summary Milestone Reports for Weekly and bi-weekly periods showing following:</p> <ul style="list-style-type: none"> <li>• List of Milestones achieved/completed using color indication e.g. Green</li> <li>• financial reports, budget reports</li> <li>• List of Milestone pending</li> <li>• Summary reports both in statistical and chart format</li> <li>• OOB Project Milestones Report is available for use but without KPIs.</li> <li>• Analyze data with Power BI &amp; Creation of reports with Power BI</li> </ul>	
19	Integration with other applications (i.e. Exchange, Active Directory, SharePoint 2013)	<p>Native integration with Active Directory for User authentication</p> <p>Native integration with Exchange Server for collaboration and email</p> <p>Native Integration with SharePoint 2013 to show views and report on intranet</p>	
20	Integration with MS Project	Native Integration of MS Project with Project Server 2013	
21	Task Management	Various views and reports are required to show the tasks level progress. These views should be easy to design and any user with minimal technical knowledge should be able to add or update a view	
22	Task Approvals	Each new task progress submitted by the end users should be approved by the Project Manager before it gets reflected on the project schedule	
23	Scheduling	Scheduling options to be provided through MS Project or from Web Access	
24	Gantt Chart	Gantt Chart views shall be provided to show project schedule in Gantt Chart format	
25	Branding	The system should be able to reflect BOK colors and logo. It should reflect our corporate identity.	



26	Project Lifecycle Automation	<p>The system should provide capability to automate the project lifecycle using a workflow designer tool. The process should be able to automate the entire project lifecycle starting from Business case development till project closure. The system should be able to provide:</p> <ul style="list-style-type: none"> <li>• Governance of all project stages and phases to ensure a uniform and standard project management methodology</li> <li>• Configuration of all approval Process in PPM.</li> <li>• Configuration of Phases &amp; stages &amp; all approval automation</li> <li>• Workflow Phases</li> <li>• Workflow Stages</li> <li>• Change or Restart Workflows</li> <li>• Project Detail Pages to capture project related information</li> </ul>	
27	Business Drivers and Prioritization	<p>The system should be able to capture different business drivers or strategic goals of the organization. It should provide functionality to carry out pair-wise priority comparison and align projects against various business drivers. It should have functionalities such as:</p> <ul style="list-style-type: none"> <li>• Driver Library</li> <li>• Driver Prioritization</li> <li>• Portfolio Analysis</li> <li>• What-if Scenarios</li> <li>• Portfolio Selection</li> <li>• Efficient Frontier</li> <li>• Capacity Planning</li> </ul>	
28	Administrative Settings	<p>The administration area should allow administrators to carry out following activities:</p> <ul style="list-style-type: none"> <li>• Security (Users roles and Permissions)</li> <li>• Backup/Restore data</li> <li>• View the Project Server Queue</li> <li>• Timesheet and Task Management</li> <li>• Workflow and Project Detail Pages</li> <li>• Manage Views</li> <li>• Resource Center Settings</li> <li>• Enterprise Custom Fields</li> <li>• Enterprise Calendars</li> <li>• Force Check-in/Check-out Projects and Resources</li> <li>• Active Directory Synchronization</li> <li>• Bulk update for Resources</li> </ul>	
29	Timesheets	<p>System should allow end users to capture and report their weekly efforts that they have put on various project as well as non-project activities. These timesheets need to be approved by the respective managers</p>	
30	Trainings	<p>The selected vendor should carry out customized trainings as per BOK needs covering following roles:</p> <ul style="list-style-type: none"> <li>• Project Managers</li> <li>• Portfolio Managers</li> <li>• Executives</li> <li>• Team Members</li> <li>• Administrators</li> </ul>	
31	Documentation	<p>It is assumed that the vendor shall provide various project management document which includes but not limited to:</p> <ul style="list-style-type: none"> <li>• Project Charter</li> <li>• Project Schedule</li> <li>• Scope Document</li> </ul>	



		<ul style="list-style-type: none"> <li>• Technical Configurations Document</li> <li>• Change Log</li> <li>• Issue Log</li> <li>• Risk Register</li> <li>• Test Cases</li> <li>• User Manuals</li> <li>• Project Closure Report</li> <li>• Bi-weekly Project Status Report</li> </ul>	
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### 2.3. Technical Requirements / Specifications

	Details
<b>Vendor Details</b>	
Company Name & Head Office address	
Product is owned Native / Third Party; Product Roadmap	
<b>Technology</b>	
Software Design Architecture / Technology	
User Administration & Integration with Single-Sign-on	
Software Implementation Methodology	
Change Management Process	
Audit Trail for user and system activities	
Ensure 24x7x365 availability requirements	
Methodology for implementation new releases/updates of proposed software.	
<b>Other Requirements</b>	
Support & maintenance offering after deployment (Onsite & Offsite)	
Basis for License Expansion and Maintenance	
Recommended Infrastructure Details for each of the bank required environment (testing, production and DR environment)	
Training of Bank Resources (User, Analyst, Technical, Support) with documentation for both user and technical trainings during of the project.	
List of Documentation available for System	



### **3. Technical Proposal Response Format**

Bidder is required to submit its Proposal in accordance with the following Mandatory Requirements; failing to which the proposal will not be considered (as Technical Evaluation is based upon Mandatory requirements).

#### **3.1.1 Mandatory Requirements**

- i. The bidder be registered with FBR for last 5 years and should provide its registration **NTN** certificate and Registration of Incorporation under the laws of Pakistan. Bidder must also provide details of last Five Years projects/software of similar in nature
- ii. Bidder must provide Purchase Order / Agreement / Completion Certificate of at least **03** deployments of similar software with relevant reference / contact information for any Organization / Financial Institutions / Banking sector
- iii. Firm should be an active tax payer and must be registered with KPRA (Khyber Pakhtunkhwa Revenue Authority) Registration certificate should be provided
- iv. Bidder should be registered and active with Pakistan Software Export Board (PSEB) and must provide its certificate
- v. Bidder must provide **Undertaking on stamp paper** that it is not being blacklisted by any of the Provincial / Federal Government or organizations of the State / Federal Government in Pakistan. And must provide List of arbitration/legal suits/unsettled disputes with clients (if any) in last five years
- vi. The bidder must submit **Annual Audited Report** for the last 03 financial years. Annual Audit Report including Balance Sheet, Income Statement and Profit & Loss accounts along with auditors' notes for the last three (3) audited years should be submitted
- vii. The bidder must have legal presence in Pakistan and must provide lists of its offices. Firm having **Offices in Peshawar/Karachi will be preferred**
- viii. The bidder should have enough Technical Strength at its end to complete the project within stipulated time. List of Staff (HR) of the Company along-with their CV's to be submitted

#### **3.1.1 Training Capabilities**

Bidder should indicate its training capabilities to provide training on software application. It should also provide a detailed training schedule. **Training premises (on-site) Interactive sessions and necessary equipment will be arranged by the vendor.** Preference will be given to the bidder with certified trainers.

#### **3.1.2 Project Implementation/Management Plan**

The bidder shall provide a detailed implementation plan and project management plan. Bidder should provide the timelines. Responding Organization should cover tasks assigned to the employees and resource allocation of responding organization during the course of the project. This should not be in generic terms but should be specific to the project. Project plans in tabular form, mentioning names of tasks, sub tasks, start date, finish date, resources and milestones will also be appreciated. In the training category, bidder is required to provide detailed training schedules along with the names of resources.



### 3.1.3 Support Capabilities

Bidder must indicate and provide support for the solution for the duration of the entire implementation process of the project. **Bidder should provide onsite support for the project for which a dedicated resource needs to be present in Peshawar/Karachi or remote offices where ever applicable at the client's site.** Number, qualifications and relevant certifications of support personnel must be indicated. The selected bidder will provide support for the duration of the project as per contract.

- **Software bugs and upgrades/enhancements warranty.** The software warranty will include providing on-site and Help Desk support for technical issues. The detailed support plan should also be included.

### 3.1.4 Warranty Period

The bidder shall give comprehensive (6) six months warranty after completion under company strategy, certifying that the software confirm exactly to the specifications laid down in the contract. An amount equivalent to 10% of total payment (inclusive of 2% earnest money) shall be retained by BoK as performance warranty/defect liability for a period of 6 months of the actual date of complete sign off and Go Live of the software. In case of delay penalty may be imposed as per contract.

### 3.1.5 Technical Evaluation Criteria

Technical Evaluation Criteria is as follows: -

Total Marks = 100		Maximum Marks
SNo	Clause	
<b>1</b>	<b>Company Portfolio</b>	
i	Number of Years the firm has been established (1 Mark for each year upto Max 10) Less than 5 Years will get Zero Marks	10
ii	Number of Completed Projects of Similar in nature (2 Marks for each Project upto Max 20) Less than 3 Projects will get Zero Marks	20
iii	Number of Completed Projects of Similar in nature in any Financial Institution (1 Mark for each Project upto Max 5)	5
iv	Number of Offices across Pakistan (1 Mark for each Office upto Max 5)	5
<b>2</b>	<b>Registration with Professional Bodies</b>	
i	Registration with Khyber Pakhtunkhwa Revenue Authority (Non Compliance with Disqualify)	2
ii	Registration with Pakistan Software Export Board (Non Compliance with Disqualify)	2
iii	ISO Certified	2
iv	CMMI Level	2
<b>3</b>	<b>Financial Capabilities</b>	
i	Average Annual Turn Over of the bidder for the last 3 Years (upto 25 Million=2 Marks, upto 50 Million=4 Marks, upto 75 Million=6 Marks, upto 100 Million or above=8 Marks)	8
ii	Audit Report for last 03 Financial Years	3
<b>4</b>	<b>Relevant Staff Assigned to the Project</b>	





i	Project Manager	
	a. Experience (1 mark for each year Max upto 4)	4
	b. Training / Certifications (1 mark for Each Training / Certification)	2
ii	Designer / Developer	
	a. Experience (1 mark for each year Max upto 3)	3
	b. Training / Certifications (1 mark for Each Training / Certification)	2
iii	Number of Supporting Staff (Technical/Hardware/Network Engineers) (1 mark for each Employee Max upto 5)	5
<b>5</b>	<b>Presentation of Proposed Solution</b>	<b>25</b>
i	Approach and Methodology	
ii	Technology Road Map	
iii	Integration, Realibility, Response Time and Performance	
iv	Work breakdown Structure	
v	Flexibility, User friendly solution, Integration Support	
vi	Software is owned Native / Third Party	
vii	User Access and Administration Control and Audit Logs	
viii	Change Management Process	
ix	Recommended Infrastructure Details required for (testing, production and DR environment)	
x	Training Capabilities	
xi	Availability of Software Documentation	
<b>Total Marks</b>		<b>100</b>
<b>Technical Qualification Marks are 50 % of the Total Marks</b>		<b>50</b>

Financial bids of firms who score at least 50% of the total marks on the technical evaluation will be opened before the representatives who wish to attend the financial bid opening.

Ratings for tender evaluation will be as follows:

Sr. No.	Description	Evaluation Weight-age
1.	Technical Proposal	70%
2.	Financial Proposal	30%

70 % weight-age will be given to Technical proposals of bidders while 30 % weight-age will be given to financial proposals. The formula for financial scoring is that the lowest bidder gets 30 points and the other bidders score 30 multiplied by the ratio of the lowest bid divided by the quoted price.

#### Example:

Value quoted by lowest bidder = A

Value quoted by second lowest bidder = B

Value quoted by third lowest bidder = C

Financial scoring of the lowest bidder will be = 30

Financial scoring of the second lowest bidder will be =  $(A/B) \times 30$

Financial scoring of the third lowest bidder will be =  $(A/C) \times 30$

Technical scoring out of 100 = A

Carried Forward & Prorated Technical scoring =  $A \times 0.7$

Points obtained in the detailed technical evaluation will be carried forward & prorated. Tender will be awarded to the bidder with maximum accumulative points (Technical Score + Financial Score).

**The decision will be binding on all concerned and will in no case be challengeable in any forum.**



### **3.2. Financial Proposal Response**

Bidder must submit its financial proposal in accordance with the following format: -

<b>SNo</b>	<b>Description</b>	<b>Amount in PKR</b>	<b>GST</b>	<b>Total Amount in PKR</b>
<b>1</b>	<b>ENTERPRISE PROJECT MANAGEMENT</b>			

#### **3.2.1 Currency**

All currency in the proposal shall be quoted in Pakistan Rupees (PKR).

#### **3.2.2 Withholding Tax, Sales Tax and other Taxes**

Bidder is hereby informed that the Bank shall deduct tax at the rate prescribed under the tax laws of Pakistan, from all payments rendered by any bidder who signs a contract with the Bank. Bidder will be responsible for all taxes on transactions and/or income, which may be levied by government.

#### **3.2.3 Governing Law**

This bidding document and any contract executed pursuant to this document shall be governed by and construed in accordance with the laws of Pakistan. The Government of Pakistan and all bidders responding to this bidding document and parties to any contract executed pursuant to this document shall submit to the exclusive jurisdiction to Courts.



### **Terms and Conditions**

- a) The Procurement Shall be conducted in accordance with the Khyber Pakhtunkhwa Procurement Rules 2014 on **Single Stage Two Envelope Procedure.**
- b) The Bank of Khyber Invites two separate sealed envelopes, one for Technical Proposal and One for Financial proposal from Service Provider having legal presence in Pakistan for installation, deployment, testing, configuration, commissioning, implementation, training and support of the required Enterprise Project Management.
- c) Bidder is required to submit both sealed proposals to the office of the Head Procurement Division, The Bank of Khyber on or before **Monday 27<sup>th</sup> August, 2018 at 3:00PM. Tender Opening date is Monday 27<sup>th</sup> August, 2018 and Time is 3:30PM at The Bank of Khyber, Head Office.**
- d) Company should sign and Stamp BOK RFP and must attached with their Technical proposal.
- e) Company seal / stamp must be fixed on both Technical Proposal and Financial Proposal.
- f) All the firms applied for the Tender must provide documents in line with the Mandatory requirements and should qualify the Technical Evaluation Criteria. **If any firm fails to qualify the Technical Evaluation Criteria, then Financial Proposal of the same will not be opened.**
- g) **Any bid submitted Late and after due date and time or bid not complying with all required clauses in this bidding document are liable to be rejected.**
- h) Call Deposit of two percent (2%) of the total bid amount in favor of the Bank should be attached with financial proposal in separate sealed envelope and should be submitted to Head Procurement Division, The Bank of Khyber.
- i) All prices quoted must be inclusive of all Taxes applicable, such as GST, Income Tax, etc.
- j) The prices quoted shall remain valid for 120 days, after the date of opening the tender.
- k) In case of consortium, the bidder must submit:
  - The details of the consortium with roles and responsibilities of each partner.
  - The original stamped consortium agreement shall be attached along-with the Bid Document.
  - The same should be endorsed by an authorized representative of the prime bidder. The Prime bidder will be the single point of contact with the Bank for the project undertaking.
  - No change in the constitution of the consortium (prime bidder/members of consortium / stakes of any member etc.) will be allowed without explicit approval of the Client.
- l) In case of failure to provide the required deliverables under the specified time, call deposit amount will be forfeited.
- m) The Bank of Khyber will not be responsible for any costs or expenses incurred by bidders in connection with the preparation or delivery of bids.
- n) No negotiations and revised bids will be allowed.

**Head Procurement, General Administration Department  
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