NON-PIVOTAL DISCRETIONARY GRANT FUNDING WINDOW FOR A PROVIDER TO DEVELOP THE CAREER GUIDANCE TOOLKIT

1. BACKGROUND TO W&RSETA

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) established as a legal entity on 20 March 2000 in terms of the Skills Development Act no. 97 of 1998. As guided by its mandate, the W&RSETA is required to develop and implement the Sector Skills Plan (SSP) and Strategic Plan (SP) within the framework of the National Skills Development Strategy (NSDS) and Department of Higher Education and Training (DHET) and National Treasury in promoting and facilitating the skills development in the wholesale and retail sector.

2. OBJECTIVE OF THE FUNDING WINDOW

The objective of this funding window is to appoint a provider with the ability to develop, implement, support, and administer an online Career Guidance Toolkit for the W&RSETA. The purpose of the online Career Guidance Toolkit is to capacitate and guide prospective learners on various career options and opportunities in the Wholesale and Retail sector, including stakeholders and regional career guidance practitioners. The Online Career Guidance Toolkit should provide self-exploration and interactive tools and information relating to careers linked to occupations, learning programmes and employment across the W&R Sector.

Additionally, the following should also be available on the Online Career Guidance Toolkit:

- Dynamic and interactive content scheduler for planned events such as career exhibitions, applications and closing dates for bursaries, learnerships and internships, apprenticeships, graduate placement and intern opportunities, and other types of planned activities.
- W&RSETA allocation of funding opportunities such as bursary applications, for access to learnerships and skills development programs, apprenticeships, as well as mentorships for small business development and opportunities for employment.
- The users of the toolkit must be able to explore career opportunities by undertaking a career quiz related to the sector, work readiness quiz and support programmes, to determine suitability for various career opportunities and be prepared for the workplace.

3. SCOPE OF SERVICES

The successful provider for this service will be required to develop, implement, support, and administer the solution that will provide the features, capabilities, and functionalities as per the requirements outlined in this Terms of Reference, however, not limited to these.

3.1   General Requirements:

The toolkit must meet the following general requirements:

- Security (Confidentiality, integrity, and availability of data) is of utmost importance. The toolkit must be designed in such a manner that the W&RSETA internal systems will not be accessed by external stakeholders. The toolkit will be wholly owned by the W&RSETA.
- Access control/registration onto the toolkit.
- The toolkit must be accessible from various software platforms i.e.
  - Microsoft Windows Platform;
  - Apple Platform;
  - Android Platform; and
  - Various devices i.e., desktop, laptop, and android or smartphones.

- Access to and interaction with the toolkit must allow for people with disabilities to access through the device(s) used (as mentioned above) and current technologies available.
- The toolkit must allow for role-based access control.
- The toolkit must adhere and comply with current legislation and regulations, and specifically the Protection of Personal Information Act (POPIA).
- The toolkit should be able to be augmented with current technologies within the W&RSETA for the foreseeable future.
- The toolkit should be a centralised secure platform for dissemination of information and tools to service the W&RSETA's stakeholders.
- It must provide a tracking mechanism to monitor stakeholder engagements and participation on content.
- Provide management information and customisable reporting (measure, report and evaluation) to improve on service delivery to all parties.
- Provide the ability to allow stakeholders to interact with W&RSETA by way of comments, recommendations, and feedback for the toolkit.
- The toolkit should be developed, implemented on, and hosted at W&RSETA data facility.
- The documentation for all aspects of the toolkit must be provided. This will include but not limited to:

  - Architecture diagrams
  - Standard Operating procedures
  - Training materials
  - Process flows and responsibilities
  - Setup and configuration

- Training must be provided to all staff and technical members on the developed toolkit.
- The successful provider will be expected to do the following:
  - Ongoing support and administration must be provided for the duration of the contract.
  - Coordinate the customization of the toolkit for W&RSETA.
  - Conduct training on the toolkit functionality for internal staff operating the toolkit.
  - Provide Project Management services to manage the on-time delivery of the various initiatives per an approved project plan; and
  - Transfer skills to the relevant W&RSETA officials.

3.2   Features and Capabilities of the Online Career Guidance Toolkit

3.2.1   The toolkit must provide the following features and capabilities:

- Complete a Career Assessment/Questionnaire
- Develop your Career Path
- Schedule an appointment with a career guidance practitioner
- View an Online Diary
- Subscribe to the Career Guidance Toolkit
- View Information about the Wholesale and Retail Sector
- View Information on the W&RSETA Career Development Programme
- View Information on Careers in the W&R Sector
- View Information on Learning programmes
- View Information on Learning Providers
- View Information on Employment Opportunities
- View Information on Bursaries
- View Information on Internships
- View Information on Learnerships
- View available opportunities for Persons with Disabilities
- View Information on How to Start a Small Businesses
- Function to register and login to the toolkit
- Function to View Career Guidance Research
- Function to provide suggestions and feedback
- Function to View Gallery
- Display contact details
- Display Social Media Links
- Display Partners
- Display Disclaimer
- And/or not limited to other related categories

3.2.2   Standard layout requirements:

- Registration and login

- Search function and capabilities

- Suggestions and Feedback

- Contact Us

- Tools

- Questionnaires

- Develop a career path

- Schedule appointments

- Online Diary

- Subscribe to the portal

- Information sharing

- Wholesale and Retail sector

- W&RSETA Career development unit

- Careers in the Wholesale and Retail sector

- Learning programmes

- Learning providers

- Jobs available

- Search
  - Bursaries
  - Internships
  - Employers
  - Mentors and Coaches

- Application

  - Bursaries
  - Internships
  - Learnerships

3.2.3   Integration

The toolkit must allow for integration into third party systems related to Bursaries, Internships, Mentors and Coaches and integration into related Government provided information (Government Skills Portal) where possible and agreed upon with the relevant parties. To this end, MOU's will be signed with relevant parties.

4. Support, Maintenance, and Additional Development

The Provider shall:

- Make a helpdesk available to the W&RSETA for the contract duration.
- Ensure that the helpdesk is accessible by telephone, email and using the Developer's web-based ticketing system.
- Ensure that the helpdesk is operational and adequately staffed during Business Hours.
- Ensure that its response to a request for Support, Maintenance and/or additional development shall include an acknowledgement of receipt and a ticket number.
- Provide the Support and Maintenance Services in accordance with Schedule 1 (Maintenance SLA) and Schedule 2 (Support SLA) that will be signed with the successful provider.
- Warrants to the W&RSETA that the application of Updates to the Software will not introduce any Software Defects into the system(s).
- From time to time during the grant period, the parties may agree that the Provider shall provide additional development services.

The following matters (at least) relating to any additional development must be agreed to before the Provider begins the provision of those additional development Services:

(a) The scope of the additional development.

(b) Services and the specification of the additional services.

(c) The timetable for the provision to the additional development services.

(d) The Customer's specific obligations in relation to the additional development services.

(e) What (if any) acceptance procedure will apply to the additional works.

(f) How the Intellectual Property Rights in the additional works will be assigned and/or licensed.

(g) What warranties the developer will give to the W&RSETA in relation to the additional Works.

(h) The amount or calculation of the charges payable in respect of the additional development services.

5. Current IT Technologies

The W&RSETA predominately uses Microsoft products and can be classified as a Microsoft site. The following IT Technologies and Standards are in use:

- Microsoft Servers 2016
- Windows 10
- Internet Information Server

- MS SQL Server

- Microsoft 365 A5 subscription

- Microsoft Dynamics 365 (on-premise)

- Bespoke applications built on and with

  - Net Framework

  - Java

  - C#

  - ASPX

- Microsoft Active Directory Services include DNS, AD FS (Federated Service) and AD CS (Certificate Service)

- Servers are hosted in a private cloud at a service provider

- SDWAN network infrastructure connecting all offices

- Internet Breakout managed by the Service Provider

5.1   IT Enterprise Principles

To provide the W&RSETA with an effective, efficient, and fit for purpose solution to the problem, it is important to note the following guiding Enterprise principles.

- **Outsourced where feasible**: The W&RSETA IT department is not structured to support and maintain various solutions and products.

- **Buy before build**: Meaning off the shelf products with minimal modifications.

- **Use what we have**: Using current technologies to prevent duplication of capabilities.

- **Keep it simple**: Solutions should be fit for purpose and easy to use, support and maintain. Keep the number of solutions and products to a minimum to limit complexity.

- **Automate:** Automate as much as possible to achieve efficiencies within our processes.

- **Secure access**: Protection of access to systems, information and data as required by Law and Regulations.

- **Sustainability:** Solutions must be future proofed by using established technologies.

6.   Timeframes

The W&RSETA requires the project to be partly implemented within the 2022/23 financial year to meet the SETA's obligations to its stakeholders and fully implemented by close of the 2023/24 financial year. An Agile approach methodology must be followed to deliver features and capabilities according to priorities (impact and urgency) as set by W&RSETA, and not a big bang approach. It is therefore required that a high-level example project plan be provided.

The project plan must include at least the following areas:

- Target Business Process design
- Development
- Testing
- Training
- Implementation
- Post-implementation support

For the above, a Prince2 methodology (adjusted for the purposes of this initiative) should be followed.

7. Pricing

A fixed and variable pricing schedule must be provided according to the template provided in Annexure A of the application form. The fixed pricing schedule must show once off and fixed pricing for this initiative and a variable price schedule for resources for the duration of the contract. All pricing in line with the scope of services must be shown inclusive of any applicable VAT.

8. Quality Assurance Reviews

Quality Assurance of the services will be provided in a form of monthly reporting to the duly appointed W&RSETA official(s) at agreed timeframes.

9. Monitoring Progress of Services

The W&RSETA shall monitor and evaluate the progress of the delivery of services through deliverables as stipulated in the Service Level Agreement.

10. Independence and Objectivity of Staff

In carrying out the service, the Provider must ensure that its staff maintains their objectivity by remaining independent of the activities they execute.

11. Special Terms and Conditions:

A Provider who is developing on an existing product or providing a third-party solution (where a reseller agreement must be in place) must provide a valid accredited reseller and/or certification letter as part of the proposal. If the reseller letter is not provided, the W&RSETA reserves the right to disqualify the application.

Intellectual Property will be managed as follows:

a) After developing of the toolkit, W&RSETA will wholly own the Career Guidance Toolkit, all rights as well as Intellectual property rights associated with the development of the toolkit.

b) The Source Code and the rights associated to the developed toolkit will also be wholly owned by W&RSETA.

c) Any future maintenance and improvements of the developed toolkit will be managed at W&RSETA's discretion.

d) The future developments and improvements of the developed toolkit will also be wholly owned by the W&RSETA.

Mandatory Requirements	
Mandatory Submission Requirements	The provider applying for the grant must submit electronic copy of the Compliant, Technical and Price Proposal.
	The provider applying for the grant must have a valid tax clearance certificate.
	Providers can partner in submitting the proposal based on the expertise on the toolkit / system development requirements and career guidance content.

Technical Evaluation Criterion		Weighting
1	Experience	30%
2	Expertise	20%
3	Approach and Methodology	30%
4	Implementation Plan	20%
		100%
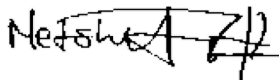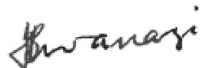
Evaluation Criterion and Submission Requirements

#	Evaluation Criterion	Submission Requirements	Weighting
	Experience 	**Experience** The proposal should illustrate the experience of the organisation in managing and implementing projects aligned to the scope of services. Further, a list of projects completed, to be presented in a tabular format, detailing the following: • Name of the institution / company where the service was delivered; • Title or name of Project; • Scope; • Duration of project; • Year completed; and • Value. The Provider must submit reference letters from different organisations as evidence of related work / service previously conducted in-line with the scope of services. The Reference Letter(s) must not be older than 3 years, and must include the following: • Presented on a company letterhead of the previously serviced client and should reflect at least name of the client; • Title/Name of the related work concluded; • Year(s) and month(s) to complete the related work / services; • Value of the work / services rendered; • Contactable reference name and contact details; and • Signed by the appropriate delegate. The Reference Letter should indicate the quality of the service rendered. **Evaluation points:** **0 = 0 point** No evidence submitted or services no related to the scope of services **1= 10 points** The Proposer submitted proof experience in the form of one similar project of the same size with the project on DG window. The Provider submitted one reference letter for relevant work conducted over the past one to three years. The reference letter includes all the required information.	**30%**

Experience table:

Value	Weight
0	0 point
1	10 points
2	20 points
3	30 points

		2= 20 points The Proposer submitted proof experience in the form of two similar projects of the same size with the project on DG window. Two reference letters for relevant work conducted over the past one to three years are provided. The reference letters include all the required information. **3= 30 points** The Proposer submitted proof of experience in the form of three or more similar projects of the same size with the project on DG window. Three reference letters for relevant work conducted over the past one to three years are provided. The reference letters include all the required information.	
2.	**Expertise** 	Value	Weight
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0	0 point
1	5points
2	10 points

3	20 points		The Service Provider should ensure that team is balanced in terms of skills and competencies. The team must have appropriate qualifications and experience to deliver on the scope of services.
			
			Provide a list in a tabular format of the team members, taking into consideration the following areas:
			
			    o Roles of members
			    o Qualification
			    o Experience
			    o Projects delivered in-line with the scope of services
			
			The above to be supported with certified copies of qualifications for each of the team members. Certification of qualifications should not be older than 3 months. Uncertified qualification and/or certified qualifications older than 3 months at the time of the closing date will not be accepted and will therefore not score any points.
			
			Evaluation points:
			
			0= 0 point
			
			No evidence or experience in the field related to the scope of services. The team does not have suitable skills, qualifications, or experience and/or team composition is not appropriate
			
			1= 5 points
			
			Team composition comprised of partially skilled, qualified and/or experienced team members
			
			2= 10 points
			
			The team is skilled to deliver the scope of services with appropriate qualifications and experience.
				20%

		3= 20 Points The organisation and team have extensive experience and expertise in delivering projects of a technical nature including delivery Career Guidance Services. A highly skilled thought-through team composition	
2	**Approach and Methodology** | Value	Weight | |---|---| | 0 | 0 points | | 1 | 10 points | | 2 | 20 points | | 3 | 30 points |	The proposal should clearly articulate the Approach and Methodology that would be adopted to ensure that the project undertaken will be delivered with scope, time and budget, taking into consideration the scope of service and technical, functional and administrative requirements detailed in the Terms of Reference. The proposal must include the following: • Agile Approach • Scrum Framework • ITIL Change and release management • Training Framework **Evaluation points:** 0 = 0 point (Poor) The suggested approach and methodology of delivery of the services give rise to major concerns. The response does not demonstrate that the proposer has the expertise to deliver all or a substantial part of the services. There is a significant risk of poor performance should the Proposer be successful. **1 = 10 points (Average)** Whilst the suggested method of delivery of each element of the service is generally acceptable, the proposal lacks detail and/or certain elements of the methodology and approach. There is some risk of poor performance, the successful Proposer will / would need to be managed closely. **2 = 20 points (Good)** The proposed way of providing each component of the services is acceptable, and the proposal shows that they have the necessary expertise / knowledge to provide the services. However, some parts of the approach and methodology are ambiguous / unclear and might not completely meet the scope of the services. The proposal partially reflects the use of an Agile Approach, Scrum Framework, ITIL Change and release management, Training Framework. There is some risk not being met entirely, this risk will need to be managed.	30%

3 = 30 points (Excellent)

The proposal provides extremely strong proof that Provider has the necessary expertise / knowledge to deliver each component of the scope of services, and the suggested approach and method of service delivery is exceptional taking into consideration the technical nature if the service required. The proposal fully reflects the use of an Agile Approach, Scrum Framework, ITIL Change and release management, Training Framework. There is a low risk of poor performance should the Proposer be successful.

3	**Implementation Plan**	The implementation plan should be presented with clear milestones, deliverables, quality indicators, period of delivery, resources, dependencies, and acceptance of all quality indicators to ensure successful implementation of the system to the W&RSETA.	20%
	<table><tr><th>Value</th><th>Weight</th></tr><tr><td>0</td><td>0 point</td></tr><tr><td>1</td><td>5 points</td></tr><tr><td>2</td><td>10 points</td></tr><tr><td>3</td><td>20 points</td></tr></table>	**Evaluation points:** **0= 0 point – Poor** No plan presented or the plan presented is not aligned to the scope of services. 1= 5 Points High-level plan is presented with lack of alignment to the scope of services. 2 = 10 Points High-level plan is presented, taking into consideration the submission requirements. 3 = 20 points A detail presentation of the implementation plan adhering to the submission requirements is provided.	

14. APPROVALS

Compiled By:

Name	Thozamile Thusani
Position	Specialist: Career Guidance
Signature	[signature] **Date** 15 September 2022

Supported by

Name	Dr. Edzisani Netshiozwi
Position	Senior Manager: Strategic Planning
Signature	[signature] **Date** 15 September 2022

Budget recommended by

Approved:		**Not Approved:**		
Full Name	Ms. Deborah Machard			
Position	Executive: SPPE			
Notes				
Signature	*D C Machard*	**Date**	15092022	

Approval:

Approved:	✓	**Not Approved:**		
Full Name	Mr. Tom Mkhwanazi			
Position (Executive)	Chief Executive Officer			
Notes				
CEO's Signature	[signature]	**Date**	18/09/2022	