
TERMS OF REFERENCE



Online Stakeholder Engagement System

WRSCM-2021/2022-0032

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 BID

The objective of this bid is to appoint a service provider with an ability to provide, implement, support, and administer an Online Stakeholder Engagement System that will provide capabilities and functionalities to improve the W&RSETA stakeholder services as shown below.

2.1 Online Stakeholder Engagement System

The W&RSETA deals with a myriad of stakeholders, ranging from learners, providers, employers, partners, practitioners to quality councils and other bodies. This results in numerous types of queries, complaints and other incoming customer related data and information, emanating from these daily business activities.

The number of queries coupled with the manual handling of such presents a risk that stakeholder queries are not being managed, tracked, recorded, and routed in a systematic/standardized manner. This may impact the number of unresolved, misrouted, or un-responded to queries, leading stakeholders needing to explore alternative means to lodge these queries resulting in stakeholder frustrations and reputational damage to W&RSETA, if not resolved and closed within a timeous and standardized manner.

3. SCOPE OF SERVICES

The successful bidder will be required to provide, implement, support, and administer the Online Stakeholder Engagement System that will provide the features, capabilities, and functionalities as per the minimum requirements listed below:

3.1 General requirements

3.1.1 The proposed solution must meet the following general requirements:

- Security (Confidentiality, integrity, and availability of data) is of utmost importance. The solution must be designed in such a manner that the W&RSETA internal systems will not be accessed by external stakeholders. Only authorised stakeholders should make use of the system as the system will be wholly owned by the W&RSETA.
- The solution must be accessible from various software platforms i.e.
 - Microsoft Windows Platform

- Apple Platform
 - Android Platform
 - And from various devices i.e., desktop, laptop, and android or smartphones.
- Role based access control.
 - The solution must adhere and comply with current legislation and regulations, and specifically the Protection of Personal Information Act (POPIA).
 - Should integrate/augment and/or be built with current technologies within the W&RSETA.
 - It is accessible to both internal and external parties.
 - 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&R SETA by way of comments, recommendations, and feedback.
 - Is expected to be developed, implemented on, and hosted at W&RSETA data facility.
 - The documentation for all aspects of the system must be provided. This will include but not limited to
 - System 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 system.
 - Ongoing Support and administration must be provided for the duration of the contract.
 - Coordinate the customization of system to W&RSETA.
 - Conduct training with internal staff operating the system (system administrators) on system functionality to further manage system.
 - 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 High-level requirements

3.2.1 Features and capabilities

- Ability for stakeholders to log into system to log queries, complaints, or requests for information.
- The system should allocate each query with a unique reference number (ticket number) and route queries based on its nature to the relevant unit/manager/region for response.

- Queries must be tracked on system with strict lead times built into algorithm, queries not responded to within timeframes should automatically be escalated to the relevant .manager of the unit/region/department by the system.
- The system must have provision for queries to be closed on the system, communicated to stakeholders (feedback loop) and stored for future reference.
- Functionality for the generation of Management Reports from the system (Example: Number of queries lodged versus those closed or number of queries per department etc.).
- Automated routing to the correct Business unit with limited user intervention.
- The system must provide different ways to interact with stakeholders from a Marketing and communication perspective.
- Chatbot functionality for routine queries or FAQ's.
- Inbound capabilities which will include voice routing, voice mail, call back, incident ticketing, social media feeds and routing capabilities.
- The system must provide for a self-service capability through the incorporation of Chatbots and virtual agents amongst others.
- An audit trail of logged queries, complaints, or requests for information.
- Centralised system having the same look and feel as current W&RSETA Hub Portals

3.2.2 Standard layout requirements:

- Login and Registration
- Logging of a ticket (query, request, issue etc.)
- Search
- Management Information and reports
- Announcements

3.2.3 In place Systems and Technologies

- Integration - Integration to the current MIS/LMS system and Dynamics 365 systems.

4. Support, Maintenance, and additional development

4.1 Support and Maintenance

- The Service Provider shall make available to the Customer a helpdesk.
- The Service Provider shall ensure that the helpdesk is accessible by telephone, email and using the Developer's web-based ticketing system.
- The Service Provider shall ensure that the helpdesk is operational and adequately staffed during Business Hours.
- The Service Provider shall ensure that its response to a request for Support, Maintenance and/or additional development shall include an acknowledgement of receipt and a ticket number.

- The Service Provider shall provide the Support and Maintenance Services in accordance with Schedule 1 (Maintenance SLA) and Schedule 2 (Support SLA).
- The Service Provider warrants to the Customer that the application of Updates to the Software by the Service Provider will not introduce any Software Defects into the system(s).
- The Service Provider warrants to the Customer that the application of Updates to the Software by the Customer in accordance with the instructions of the Service Provider will not introduce any Software Defects into the Software.
- From time to time during the Term, the parties may agree that the Service Provider shall provide Additional Development Services.

4.2 Additional Development

The following items for additional requests must be agreed upon between the parties, before work can commence:

- (a) The scope of the Additional work.
- (b) Services and the specification of the Additional work.
- (c) The timetable for the provision to the Additional work.
- (d) The Customer's specific obligations in relation to the Additional work.
- (e) What (if any) acceptance procedure will apply to the Additional work.
- (f) How the Intellectual Property Rights in the Additional work will be assigned and/or licensed.
- (g) What warranties the Developer will give to the Customer in relation to the Additional development and
- (h) The amount or calculation of the Charges payable in respect of the Additional development.

5. Current IT Technologies

The W&RSETA predominately uses Microsoft products and can be classified as a Microsoft site. The current technologies in use are as follows:

- Microsoft Servers 2016
- Windows 10
- Internet Information Server (The current website is hosted within this technology).
- MS SQL Server
- Microsoft 365 A3 subscription which includes the following:
 - Sharepoint
 - Power apps
 - Power Flow
 - OneDrive
 - Microsoft Teams
 - Microsoft Power BI (Free licenses)

- Bespoke applications built on and with
 - Net Framework
 - Java
 - C#
 - aspx

- Microsoft Active Directory Services include DNS and DHCP
- Servers are hosted in a public cloud at a service provider
- SDWAN network infrastructure connecting all offices to a service provider
- Internet Breakout managed by a service provider

6. 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
- 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 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.

7. Timeframes

The W&R Seta requires the solution to be implemented within this financial year (2021/2022) to meet our obligations to our stakeholders. An Agile approach methodology must be followed to deliver features and capabilities according to priorities (impact and urgency) as set by W&R Seta. It is therefore required that a high-level example project plan be provided in the template provided (**See Annexure A**).

The project must include at least the following areas:

- (a) Target Process design
- (b) Development
- (c) Testing
- (d) Training
- (e) Implementation
- (f) Post-implementation support

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

8. Pricing

A fixed and variable pricing schedule must be completed according to the template provided in **Annexure A**. The fixed pricing schedule must show once off and fixed pricing for this initiative. A price schedule providing variable pricing 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 and disbursements.

9. Duration

The project duration is for a period of 24 months from successful conclusion of a contract.

10. Evaluation Criteria

The Preference Points claim in terms of the Preferential Procurement Regulation 2017, the 80/20 system for requirements with a Rand value up to R50 000 000 (all applicable taxes included) will apply for this bid.

11. Expected outcomes and deliverables

It is expected that this solution provides the required functionality as stated in the scope of services.

12. Quality Assurance Reviews of the Services

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

13. Monitoring Progress of Services

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

14. Independence and Objectivity of Staff

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

15. Terms and Conditions:

1. A bidder who is developing on an existing product (where a reseller agreement must be in place) must provide a valid accredited reseller letter as part of the proposal. If the reseller letter is not provided the W&RSETA reserves the right to disqualify the bid.

2. Intellectual Property would be treated as follows:

(a) After developing of the said system(s), W&RSETA will own the developed system and the rights as well as international Intellectual property rights associated to the developed system.

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

- (c) Any future maintenance and improvements of the said developed system will be managed at W&RSETA's discretion.
- (d) The future developments and improvements of the developed system will also be wholly owned by the W&RSETA.

| Mandatory Requirements | | |
|---|---|---------------|
| Evaluation Criteria | Requirements: | |
| Mandatory Submission Requirements | Bidder must fully complete the Prescribed Standard Bidding Documentation (SBD) | |
| | Bidder must be registered on Central Supplier Database (CSD) and must submit proof of registration | |
| | Bidder must submit one (1) hard copy of the Compliant, Technical and Price Proposal. | |
| | Annexure A- Bidder must fully complete the Annexure A. Technical Evaluation requirements are detailed in Annexure A | |
| <p>Note: Failure to complete the SBD documentation and non-adherence to the Mandatory requirements will render your bid as non-responsive. Submission Requirements: The Technical Threshold for this bid is 80%. Bidders who do not meet the minimum technical threshold will not be evaluated on price.</p> | | |
| Technical Evaluation | | Points |
| 1 | Experience | 10.00 |
| 2 | Expertise | 10.00 |
| 3 | Methodology and Approach | 10.00 |
| 4 | Implementation Plan | 5.00 |
| 5 | References | 5.00 |
| 6 | General Requirements | 30.00 |
| 7 | Online Stakeholder Engagement System | 30.00 |
| Total Score | | 100.00 |

14. APPROVALS

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|-----------------------------|---|-------------------------|--------------------------|
| Compiled By: | | | |
| Name | Mr. Thozamile Thusani | | |
| Position | Project Manager | | |
| Signature | | Date | |
| Reviewed By: | | | |
| Name | Mr. Jacobus Geldenhuys | | |
| Position | BSC Chairperson | | |
| Signature |  | Date | 2022/01/07 |
| Recommendation: | | | |
| Recommended: | <input checked="" type="checkbox"/> | Not Recommended: | <input type="checkbox"/> |
| Manager's Full Name | Ms. Lindiwe Nhlapo | | |
| Position | Chief Financial Officer | | |
| Notes | | | |
| CFO's Signature |  | Date | 12/01/2022 |
| Approval: | | | |
| Approved: | <input type="checkbox"/> | Not Approved: | <input type="checkbox"/> |
| Manager's Full Name | Mr. Tom Mkhwanazi | | |
| Position (Executive) | Chief Executive Officer | | |
| Notes | Acting CEO 03/01/2022-13/01/2022 | | |
| CEO's Signature |  | Date | 12/01/2022 |