CAREER DEVELOPMENT PLATFORM AND IT INTEGRATED SERVICES

BID NUMBER: WRSCM-2021/2022-0031

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 develop, implement, support, and administer an online integrated portal for the W&RSETA that will provide the following capabilities and functionalities:

2.1 Online Research Hub Portal

The primary objective of the Online Research Hub Portal is to store all the research outputs, improve the dissemination of research findings and recommendations, ensure accessibility of the research reports, contribute to improved processes for the update of the research agenda, and improve communication between W&RSETA and stakeholders on research and skills planning matters.

2.2 Online Career Guidance Hub Portal

The purpose of the Online Career Guidance Hub Portal is to capacitate and guide learners on various career options and opportunities in the Wholesale and Retail sector (stakeholders and the regional career guidance practitioners). The Online Career Guidance Hub Portal should provide self-exploration tools and information relating to occupations, scarce skills and courses in the W&R Sector.

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

- Dynamic content like planned events such as career exhibitions, closing dates for bursaries, learnerships and internships, graduate placement opportunities, internship opportunities and dates of workshops, inclusive of persons with Disabilities will be made available.
- Address an immediate need of W&RSETA to ensure the correct allocation of funding for opportunities such as bursaries, learnerships, skills development programs, as well as mentorships for small business development and opportunities for jobs.

To meet this need, the applicant/beneficiary must be able to undergo a career guidance assessment to ensure they are suited for these various opportunities that are made available.

2.3 Monitoring and evaluation metrics and dashboard (M&E)

Monitoring and Evaluation is an approach that has been developed to measure and assess the successes, limitations, impact, and performances of W&RSETA projects and programs of the entire organizations.

The required M&E Portal should allow for the annual performance plan to be measured against the technical indicators for measurement of performance across the organization.

This should enable the W&RSETA to load target indicators, performance metrics per each functional area with metrics and dashboards that are easy to assess, measure, and manage performance.

The Monitoring and Evaluation Hub Portal will mainly be internally facing allowing the internal staff to be able to record and monitor the organization's performance with respect to the following:

- The Strategic Plan (SP),
- The Annual Performance Plan (APP) – All Programmes,
- W&R SETA Special Projects,
- Organisational and Provincial Operational plans,
- Transformational Targets, and
- Organisation's performance against the Service Level Agreement (SLA) with DHET.

2.4 Quality Management Hub Portal

The Quality Management Hub Portal will be used by the W&RSETA to store, review, update, publish, train, audit, and monitoring of Quality Management Hub Portal (Policies, Procedures, Templates, and related documentation) using automated functionality.

2.5 Modernization of W&RSETA Website

The primary objective of this initiative will be to modernise and improve the current W&RSETA Website to conform to the latest trends. The above-mentioned initiatives need to be incorporated into the website to provide our stakeholders with a responsive experience and consistent look and feel.

3. SCOPE OF SERVICES

The successful bidder will be required to develop, implement, support, and administer the solution that will provide the features, capabilities, and functionalities as per the requirements delineated in section. All the Portal Hubs, website and M&E solution should be developed on a Microsoft SharePoint platform.

3.1 General requirements:

The proposed solution must meet the following general requirements:

- Centralised Portal having the same look and feel.
- 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 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.

    o Microsoft Windows Platform
    o Apple Platform
    o Android Platform, and from
    o various devices i.e., desktop, laptop, and android or smartphones.

- Access to and interaction with the solution must allow for people with disabilities through the device(s) used (as mentioned above) and current technologies available.
- 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 be able to integrate/augment and/or be built with current technologies within the W&RSETA.
- It is accessible to both internal and external parties.
- Should be a centralised secure platform for dissemination of information and tools to service our stakeholders.
- 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 different Portals.
- The Portal should be developed, implemented on, and hosted at W&RSETA data facility.
- The documentation for all aspects of the Portal 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 developed Portal.
- The appointed Service 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 Portal for W&RSETA.
  - Conduct training with and for internal staff operating the Portal (system administrators) on Portal functionality to further manage Portal.
  - 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

The high-level requirements/features for each of the different Portals are as follows:

3.2   Online Research Hub:

3.2.1   Features and capabilities

The following features and capabilities are required:

- Allow for stakeholders to register on the portal;
- Allow internal administrators to monitor control of all publications to the portal;

- A search feature that will allow users to search for content that has been published on the portal;
- Provide Management Information on all research that is published on the portal;
- A survey capability is required;
- Notification features using various communication methods like SMS, email, WhatsApp and so on;
- The Research Hub should be a SharePoint based solution that is accessible to both internal and external clients;
- Create a platform for dissemination of research findings and recommendations;
- The Research Hub portal should be accessible through a secure interface from the organisation's website;
- Research Hub tracking tool to monitor stakeholder engagements on the research and skills planning content;
- Respond to low stakeholder participation and engagements in sector research activities;
- The hub should have an access link to allow stakeholders to make comments, recommendations, and inputs;

3.2.2   Standard layout requirements:

The following standard layout requirements are required:

- About Us
- Partners
- Search
- Contact Us
- Notifications
- Subscriptions
- Research
- Discussions
- Surveys
- Statistical Information
- Login and Registration
- Announcements
- Events
- Newsletters

3.2.3   Current Systems and Technologies In place

There is no system in place currently.

3.2.4   Integration

There are no integration points at this stage.

3.3 Online Career Guidance Systems

3.3.1 Features and capabilities

The following features and capabilities are required:

- 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 Portal
- View Information on the Wholesale and Retail Sector
- View Information on the W&R SETA Career Development Unit
- 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 portal
- 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

3.3.2 Standard layout requirements:

- Registration and login
- Research
- 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

3.3.3 In place Systems and Technologies

There is no system in place now.

3.3.4 Integration

- Integration into 3rd party systems related to Bursaries, Internships, Mentors, Coaches.
- Integration into related Government provided information (Government Skills Portal)

3.4 Quality Management system

3.4.1 Features and capabilities

The following features and capacities are required:

- Provide a central system for the storage of W&RSETA Policies, Procedures, Templates, and related documentation;
- Solution to encompass functionality to develop new policies or revise existing policies whilst on the system (automated);
- Enable automated version control, submission, approval and review of Policies, Procedures, Templates, and related documentation on the system;
- In this regard, automated reviews should entail the system sending out review notifications for policies and routing to various authors to undertake reviews on the system.
- Approval functionality by routing documents in the QMS to respective officials for approval and/or comments post submission (through various approval layers/channels);

- Functionality for the communication of Policies, Procedures, Templates, and related documentation to each user in W&RSETA (desktop icon), as well as external users (portal access) to view Policies, Procedures, Templates and related documentation;

- The system should contain a mechanism for training of internal users on policies and recording which users have undergone training/accessed policies (Digital badges or similar);

- Automated recording, routing, and closing of non-compliances uncovered during daily operations or audits (Non-conformance reporting module);

- System must comprise provision for planning, conducting, and storing of QMS audits (Audit module);

- The solution should be a SharePoint compatible application; and

- Support and maintenance will be required to ensure the day to day running of the solution and to develop and maintain future enhancements/customisation to the solution.

3.4.2 Current Systems and Technologies in place

The QMS system is housed as part of a Microsoft 365 SharePoint site that provides basic functionality on approved documents.

3.4.3 Integration

There are no integration points at this stage

3.5 Monitoring and evaluation system

3.5.1 Features and capabilities

The following features and capabilities are required:

- Create, maintain a Monitoring and Evaluation Plan

  o M&E Framework (Theory of change) that shows clear linkages between Outcomes, Outputs, Activities, and Inputs

- Create, maintain a M&E Framework which should cover the following areas:

  o Strategy and direction
  o Management and Governance
  o Project specific outputs
  o Adoption and/or uptake
  o Outcomes and impacts
  o Context

- The system will have the following functionalities:

  o Planning - data entry
  o Monitoring – data entry, export in various formats
  o Dashboard Reporting – geographical (provincial) view, reports, graphs, and ad-hoc custom reporting capability

- Create, maintain Indicators for each of the M&E Framework areas
- Allow for various types of indicators
- Manual and automated data collection capability
- Setting of indicator categories
- Manual and automated evaluation against indicators
- User Customisable reports from a central dashboard

  - Presents dashboard showing progress towards outcomes, outputs and set targets

- Collaboration tools and methods with internal stakeholders
- Integration with current datasets within W&R Seta
- Uploading of ad-hoc information into a central M&E repository for data
- Role Based Access control
- Allow for flexible frequency of data collection, monitoring and evaluation time periods
- Evaluation of outcomes and targets against financial indicators
- Formative evaluation should cater for several evaluation types:

  - Needs assessment determines who needs the program, how great the need is, and what might work to meet the need
  - Evaluability assessment determines whether an evaluation is feasible and how stakeholders can help shape its usefulness
  - Structured conceptualization helps stakeholders define the program or technology, the target population, and the possible outcomes
  - Implementation evaluation monitors the fidelity of the program or technology delivery
  - Process evaluation investigates the process of delivering the program or technology, including alternative delivery procedures

- Summative evaluation should cater for the following:

  - Outcome evaluations investigate whether the program or technology caused demonstrable effects on specifically defined target outcomes
  - Impact evaluation is broader and assesses the overall or net effects -- intended or unintended -- of the program or technology as a whole
  - Cost-effectiveness and cost-benefit analysis address questions of efficiency by standardizing outcomes in terms of their dollar costs and values
  - Secondary analysis determining existing data to address new questions or use methods not previously employed
  - Meta-analysis integrates the outcome estimates from multiple studies to arrive at an overall or summary judgment on an evaluation question

3.5.2   Current Systems and Technologies in place

- Monitoring and Evaluation is currently a manual process mainly driven using excel spreadsheets and manual methods of evaluating.

3.5.3   Integration

Integration into various internal systems which includes the current initiatives.

3.6   W&RSETA Website

Overall revamping, development and ongoing maintenance and support of the W&RSETA website.

3.6.1   Features and capabilities

- Reconfigure the website to ensure faster performance and interactivity in line with current trends, on SharePoint
- Redesign pages and implement recommended functionalities
- Copy writing
- Develop summaries for landing pages
- Graphic design services

  - Design banners for various campaigns per list provided which is not exhaustive of the organisation's activities. Additional design work will be required based on organisational developments.

- The provider will also be required to provide same service to the intranet including migration of information that is currently on the SharePoint.
- Redesign logos in line with the organisation's website look and feel.
- Design landing page banners, organogram, infographics, skills metrics with an option for clickable links.
- Design a count-up feature on the W&RSETA's key highlights
- Website management, updates, changes, maintenance and support
- Management of subscriptions
- Configure all documents and images to ensure optimal performance.
- Search Engine Optimisation
- Develop, programme, optimise and fix errors on the website for SEO effectiveness as per results indicated from https://seositecheckup.com/seo-audit/www.wrseta.org.za
- Mass mailing and campaign management

  - Link HTML version of mailers to the website and enable real time editing of mailers that are distributed to internal and external stakeholders.

3.6.2   Standard layout requirements:

- To be designed

3.6.3 Current Systems and Technologies in place

- The current website is hosted internally on a Microsoft 2016 Server.
- Apache is the webserver software used
- Graphic Design services is done through a third party up to 31st March 2022.
- Mailer services is done through the same service provider who makes use of third-party software for email campaigns and mass mailing to stakeholders.

3.6.4 Integration

- No current integration points at this stage.

4. Support, Maintenance, and additional development

- The Service Provider shall make a helpdesk available to the Customer
- 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).
- From time to time during the Term, the parties may agree that the Service Provider shall provide Additional Development Services.
- The following matters (at least) relating to any Additional Development Services must be agreed before the Service Provider begins the provision of those Additional Development Services:

  (a) The scope of the Additional Development.
  (b) Services and the specification of the Additional Works.
  (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 Customer in relation to the Additional Works and
  (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 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 which includes the following

  - SharePoint
  - Power apps
  - Power Flow
  - OneDrive
  - Microsoft Teams
  - Microsoft Power BI

- Bespoke applications built on and with

  - Net Framework
  - Java
  - C#
  - aspx

- Microsoft Active Directory Services include DNS and DHCP
- Servers are hosted in a private cloud at a service provider
- SDWAN network infrastructure connecting all offices to a service provider
- Internet Breakout managed by a 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&R Seta requires the solution to be partly implemented within this financial year (2021/2022) to meet our obligations to our stakeholders and fully implemented by close of the financial year (2022/2023). An Agile approach methodology must be followed to deliver features and capabilities according to priorities (impact and urgency) as set by WRSETA, and not a big bang approach. It is therefore required that a high-level example project plan be provided in the template provided (**See Annexure A**).

The project plan must include at least the following areas:

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

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

7. 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 and a variable price schedule providing variable pricing for resources for the duration of the contract.

8. Duration

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

9. 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.

10. Expected outcomes and deliverables

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

11. 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.

12. 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.

13.   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.

14.   Pricing

All pricing in line with the scope of services must be shown inclusive of any applicable VAT and disbursements.

15.   Special Terms and Conditions:

15.1. bidder 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 bid.

15.2. Intellectual Property will be managed as follows:

- 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.
- The Source Code and the rights associated to the developed system will also be wholly owned by W&RSETA.
- Any future maintenance and improvements of the said developed system will managed at W&RSETA's discretion.
- The future developments and improvements of the developed system will also be wholly owned by the W&RSETA.

Mandatory Requirements

Mandatory Submission Requirements	Bidder must fully complete the Prescribed Standard Bidding Documentation
	Bidder must be registered on Central Supplier Database (CSD) or 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
	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.

Technical Evaluation

		Points
1	Capacity to deliver	10.00
2	Methodology and Approach	10.00
3	Implementation Plan	5.00
4	Experience and Expertise	10.00
5	References	5.00
6	General Requirements	8.00
7	Online Research Hub	8.00
8	Online Career Guidance	10.00
9	Monitoring and evaluation	10.00
10	Quality Management system	8.00
11	Support and Maintenance	8.00
12	Modernisation of Website	8.00
	Total Score	**100.00**

Note:

- Information provided, that will be used for evaluation purposes, in the proposals must be specific to the bid. Generic information will not be sufficient for evaluation purposes
- Bidders must score at least 80% overall to be evaluated further for Price and Preference
- Shortlisted bidders may be invited to present their proposals to the W&RSETA.
- The W&RSETA has the right to award or not award the bid.

CAREER DEVELOPMENT PLATFORM AND IT INTEGRATED SERVICES