



**TERMS OF REFERENCE
ONLINE STAKEHOLDER MANAGEMENT ENGAGEMENT SYSTEM
WRSCM-2022/2023-0007**

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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 to facilitate and promote skills development within the Wholesale and Retail Sector in line with national and local government's strategies.

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.

3. SCOPE OF SERVICES

The W&RSETA interacts with a myriad of stakeholders, including, Employers, Learners, Training and Service Providers, Partners, Practitioners to Quality Councils and other bodies. These typical day-to-day operations consequently result in a variety of enquiries, complaints, compliments, and other incoming customer-related data and information.

There is a high probability that stakeholder queries are not being managed, documented, recorded, and routed in a systematic/standardized manner due to the volume of queries and the manual handling of such. If not resolved and closed in a timely and consistent manner, these may have an impact on the number of unresolved, misrouted, or unanswered queries, compelling stakeholders to investigate alternate means to lodge their queries and resulting in stakeholder frustrations, posing a high risk and reputational damage to W&RSETA.

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 outlines below however not limited to these:

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 critical importance. The solution must be designed in such a manner that the W&RSETA internal systems will not be compromised or accessed by external stakeholders without prior

approval. Access to the system would be controlled through a registration process whereby users would be required to generate / create login details, username and password. Only authorised stakeholders should make use of the system as the system will be wholly owned by the W&RSETA.

- Accessibility from various software platforms and devices, listed below however not limited to:
 - Platforms:
 - Microsoft Windows
 - Apple
 - Android
 - Devices
 - Desktops
 - Laptops
 - Tablets
 - Smartphones
- Accessible to both internal and external parties;
- Developed, implemented on, and hosted at the W&RSETA data facility;
- Role based access control;
- Access to and interaction must allow for people with disabilities through the usage of the respective devices and current technologies available;
- Coordinate the scoping and finalisation of the business specification for the system build from inception or the customization of system for the W&RSETA's solution;
- Adhere and comply with current legislation and regulations, and specifically the Protection of Personal Information Act (POPIA);
- Ability to integrate / augment and/or be built with current technologies within the W&RSETA environment for the foreseeable future;
- Provide a tracking mechanism to monitor stakeholder engagements and participation on content;
- Provide management information, including statistical 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;
- Project management services to achieve the on-time delivery of the various initiatives/phases as agreed on the approved project plan;

- 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
- Conduct training with internal staff operating the system:
 - System administrators on maintenance and functionality to further manage and / or enhance the system,
 - Support staff and responsible Business Unit on the system functionality, including the management and support on the day-to-day implementation of the system;
- Ongoing support and administration to be provided for the duration of the contract; and transfer of skills to the designated 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, compliments, or requests for information;
- Functionality to allow for various type of attachments to support the query;
- Auto generated acknowledgement and allocation of a unique reference (ticket number) to each query;
- Query routing, with limited user intervention, to the respective Business Unit based on the type and nature of request;
- Tracking functionality with strict lead times built into algorithm. Unresolved queries not responded within the agreed timeframes should automatically be escalated to the responsible Business Unit Manager;
- Provision for queries to be closed on the system, communicated to stakeholders (feedback loop), archiving and retrieval thereof;
- Functionality for the generation of various Management Reports not only limited to the total count per category, per Business Unit, ageing of outstanding, reminders and resolved queries, etcetera;

- Provide different ways to engage with Stakeholders when following up for additional information or clarity and resolution of queries. Further, coupled with a functionality to make provision for Marketing and Communication Business to engage with Stakeholders from an information and sharing perspective;
- 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, for routine queries, FAQ's, virtual agents amongst others;
- An audit trail of logged queries, complaints, or requests for information; and
- Centralised system having the same look and feel as current W&RSETA Hub Portals

3.2.2 Standard Layout Requirements:

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

4. SUPPORT, MAINTENANCE, AND ADDITIONAL DEVELOPMENT

4.1 Support and Maintenance

The Service Provider shall ensure that:

- A helpdesk is made available to the W&RSETA for the duration of this service level agreement;
- The helpdesk is accessible by telephone and, email;
- The helpdesk is operational and adequately staffed during business hours;
- Response to a request for Support, Maintenance and/or additional development shall include an acknowledgement of receipt and a ticket number using the Service Provider' web-based system;
- A Support and Maintenance Services Agreement is concluded, and adherence to the terms and conditions are satisfied during the terms of services.
- It warrants to the W&RSETA that the application of any updates to the Software by the W&RSETA in accordance with the instructions of the Service Provider will not introduce any Software Defects into the Software.

4.2 Additional Development

From time to time during the term, the parties may agree that the Service Provider shall provide Additional Development Services. The parties may concur periodically throughout the term that the Service Provider shall offer additional development and / or services.

The following items for additional requests must be agreed upon between the parties, before commencement of any work:

- The scope of the additional work;
- Services and the specification of the additional work;
- The timetable for the provision to the additional work;
- The W&RSETA's specific obligations in relation to the additional work;
- What (if any) acceptance procedure will apply to the additional work;
- How the Intellectual Property Rights in the additional work will be assigned and/or licensed;
- What warranties the Service Provider will give to the W&RSETA in relation to the additional development and / or services; and
- The amount or calculation of the charges payable in respect of the additional development and / or 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), 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 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:** 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.

7. TIMEFRAMES

The W&RSETA requires the solution to be implemented within this financial year (2022/2023) to meet its 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&RSETA. It is therefore required project plan be submitted, based on the information contained in the scope of service for functional, technical, and administrative requirements.

The project plan must include at least the following areas:

- Target Process Design
- Development
- Testing

- Training
- Implementation
- Post-implementation support

The Prince2 methodology, adjusted for the purposes of this initiative, should be taken into consideration when developing and presenting the project plan.

8. PRICING

The pricing must be aligned with the scope of services inclusive of any applicable VAT and disbursements.

9. DURATION

The project duration is for a period of twenty-four months (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 technical and 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. SPECIFIC TERMS AND CONDITIONS

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.

Intellectual Property would 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.

16. MINIMUM AND TECHNICAL REQUIREMENTS

16.1 Minimum 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 Compliance document i.e. SBD 1, SBD 3, SBD 4, SBD 6.1 and GCC, Technical and Price Proposal.	
	Bidders must attend a compulsory briefing session	
Note: <ul style="list-style-type: none"> Failure to complete the SBD documentation and non-adherence to the Minimum requirements will render your bid as non-responsive. Adhere to the submission requirements for the Minimum requirements. 		
16.2 Technical Requirements		
#	Technical Evaluation Criterion	Weighting
1	Company Experience	20
2	Team Expertise	20
3	Approach, Methodology and Implementation Plan	60
Total Weighting		100
Note: Failure to complete and adhere to the minimum submission requirements will render your bid as non-responsive. The technical threshold for this bid is 80%. Bidders that fail to meet the 80% technical threshold, will not be considered for Price and Preference Evaluation.		

Evaluation Criterion and Submission Requirements													
#	Evaluation Criterion	Submission Requirements	Max Score										
1.	Experience (Company) <table border="1" data-bbox="168 438 571 678"> <thead> <tr> <th>Value</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0 point</td> </tr> <tr> <td>1</td> <td>10 points</td> </tr> <tr> <td>2</td> <td>16 points</td> </tr> <tr> <td>3</td> <td>20 points</td> </tr> </tbody> </table>	Value	Score	0	0 point	1	10 points	2	16 points	3	20 points	Experience <p>The Bidder should illustrate the experience of the organisation in managing and implementing projects aligned to the scope of services. Further, a list of projects successfully completed within the past five (5) years to be presented in a tabular format, detailing the following:</p> <ul style="list-style-type: none"> • Name of the institution / company where the service was delivered; • Title or name of Project; • Scope; • Duration of project, Year(s) and month(s) to complete the related work/ services; • Year completed; • Value. <p>The Bidder must submit reference letters relating to the above table from different organisations as evidence of related / services previously successfully conducted in-line with the scope of services.</p> <p>The Reference Letter(s) must include the following:</p> <ul style="list-style-type: none"> • 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 / services concluded; • Duration, Year(s) and month(s) to complete the related work / services; • Value of the work / services rendered; • The quality of the service rendered; • Contactable reference name and contact details; and 	20
Value	Score												
0	0 point												
1	10 points												
2	16 points												
3	20 points												

Evaluation Criterion and Submission Requirements			
#	Evaluation Criterion	Submission Requirements	Max Score
		<ul style="list-style-type: none"> Signed by the appropriate delegate. <p>Evaluation points:</p> <p>0 = 0 point</p> <p>No evidence submitted or services no related to the scope of services</p> <p>1 = 10 points</p> <p>The Bidder submitted proof of experience in the form of one similar solution. A reference letter provided with the required information and relevance to the scope of services successfully completed within the past five years.</p> <p>2 = 16 points</p> <p>The Bidder submitted proof of experience in the form of two similar solutions. Two reference letters provided with the required information and relevance to the scope of services successfully completed within the past five years.</p> <p>3 = 20 points</p> <p>The Bidder has presented proof of experience in the form of three or more similar solutions. Three or more reference letters have been provided with the required information and relevance to the scope of services successfully completed within the past five years.</p>	




Evaluation Criterion and Submission Requirements																					
#	Evaluation Criterion	Submission Requirements	Max Score																		
2	Project Team Qualifications and Skills <table border="1" data-bbox="168 418 573 561"> <thead> <tr> <th>Value</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0 point</td> </tr> <tr> <td>1</td> <td>20 points</td> </tr> </tbody> </table>	Value	Score	0	0 point	1	20 points	Expertise <table border="1" data-bbox="629 347 1827 938"> <thead> <tr> <th>Resources</th> <th>CV and Experience</th> <th>Qualification</th> </tr> </thead> <tbody> <tr> <td>Project Manager/ Business Analyst</td> <td>CV with a minimum 5 years' relevant experience</td> <td>IT Degree or Diploma and Project Management Qualification (PRINCE2,PMBOK or equivalent qualification in Project Management)</td> </tr> <tr> <td>Senior Developer</td> <td>CV with a minimum of 5 years' relevant system development experience</td> <td>IT Degree or Diploma</td> </tr> <tr> <td>Junior Developer</td> <td>CV with a minimum of 3 years' relevant system development experience</td> <td>IT Degree or Diploma</td> </tr> </tbody> </table> <p>NB:</p> <ul style="list-style-type: none"> • Bidders are to clearly state years of experience and relevant qualifications to justify points. • Copies of Qualifications must be certified by a commissioner of oaths and the certification thereof must not older be than six (6) months. Uncertified qualification and/or certified qualifications older than 6 months at the time of the closing date will not be accepted and will therefore not score any points. 	Resources	CV and Experience	Qualification	Project Manager/ Business Analyst	CV with a minimum 5 years' relevant experience	IT Degree or Diploma and Project Management Qualification (PRINCE2,PMBOK or equivalent qualification in Project Management)	Senior Developer	CV with a minimum of 5 years' relevant system development experience	IT Degree or Diploma	Junior Developer	CV with a minimum of 3 years' relevant system development experience	IT Degree or Diploma	20
Value	Score																				
0	0 point																				
1	20 points																				
Resources	CV and Experience	Qualification																			
Project Manager/ Business Analyst	CV with a minimum 5 years' relevant experience	IT Degree or Diploma and Project Management Qualification (PRINCE2,PMBOK or equivalent qualification in Project Management)																			
Senior Developer	CV with a minimum of 5 years' relevant system development experience	IT Degree or Diploma																			
Junior Developer	CV with a minimum of 3 years' relevant system development experience	IT Degree or Diploma																			

Evaluation Criterion and Submission Requirements													
#	Evaluation Criterion	Submission Requirements	Max Score										
		<p>Evaluation points:</p> <p>0= 0 point</p> <p>Service provider has failed to provide CVs for all of the above-mentioned resources with the relevant minimum years of experience as indicated above and certified copies of qualifications</p> <p>1= 20 points</p> <p>Service provider has provided CVs for all of the above-mentioned resources with the relevant minimum years of experience as indicated above and certified copies of qualifications.</p>											
3	<p>Approach, Methodology and Implementation Plan</p> <table border="1" data-bbox="168 885 571 1125"> <thead> <tr> <th>Value</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0 point</td> </tr> <tr> <td>1</td> <td>30 points</td> </tr> <tr> <td>2</td> <td>48 points</td> </tr> <tr> <td>3</td> <td>60 points</td> </tr> </tbody> </table>	Value	Score	0	0 point	1	30 points	2	48 points	3	60 points	<p>The proposal should clearly articulate the Approach, Methodology and Implementation Plan that would be adopted to ensure that the project will be delivered within scope, time and budget, taking into consideration the technical check list. The proposal must include the following:</p> <ul style="list-style-type: none"> • Agile Approach • ITIL Change and release management • Training Framework <p>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. The Scope of Service and Technical Checklist to be reviewed when presenting the Implementation Plan taking into consideration the preferred methodology</p> <p>Evaluation points:</p> <p>0 = 0 point</p> <p>The suggested approach and methodology of delivery of the services give rise to major concerns.</p>	60
Value	Score												
0	0 point												
1	30 points												
2	48 points												
3	60 points												

Evaluation Criterion and Submission Requirements			
#	Evaluation Criterion	Submission Requirements	Max Score
		<p>The response does not demonstrate that the Bidder has considered the scope, deliverables, time and budget to deliver all or a substantial part of the services.</p> <p>Either no plan presented or the plan presented is not aligned to the scope of services and the technical checklist.</p> <p>1 = 30 points</p> <p>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, scope, time and budget.</p> <p>High-level plan presented with a lack of alignment to the scope of services and time period.</p> <p>2 = 48 points</p> <p>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, time and budget.</p> <p>The proposal partially reflects the use of an Agile / Project Management Approach, ITIL Change and Training Framework.</p> <p>High-level plan presented, taking into consideration the submission requirements.</p> <p>3 = 60 points</p> <p>The proposal provides a strong evidence of a concise project plan, approach and methodology to deliver each component of the scope of services, time and budget. The suggested approach and method of service delivery is exceptional taking into consideration the technical nature of the service required.</p>	

Evaluation Criterion and Submission Requirements			
#	Evaluation Criterion	Submission Requirements	Max Score
		<p>The proposal fully reflects the use of an Agile / Project Management Approach, ITIL Change and Training Framework.</p> <p>A detail presentation of the implementation plan adhering to the submission requirements.</p>	

17. APPROVALS

Compiled By:			
Name	Mushtaq Wajoodeen		
Position	Business Analyst / Project Manager		
Signature		Date	03 October 2022
Reviewed By:			
Name	Nthate Mokgele		
Position	BSC Chairperson		
Signature		Date	03-10-2022
Recommendation:			
Recommended:	<input checked="" type="checkbox"/>	Not Recommended:	<input type="checkbox"/>
Manager's Full Name	Lindiwe Nhlapo		
Position	BAC Chairperson		
Notes			
Signature		Date	07/10/2022
Approval:			
Approved:	<input checked="" type="checkbox"/>	Not Approved:	<input type="checkbox"/>
Manager's Full Name	Tom Mkhwanazi		
Position (Executive)	Chief Executive Officer		

Notes			
CEO's Signature	<i>Swanazi</i>	Date	07/10/2022