



**THE PUBLIC SERVICE SECTOR EDUCATION AND TRAINING AUTHORITY**

**Terms of Reference**

**BID REF: BPR/PSETA/10-19**

**TERMS OF REFERENCE (ToR) FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE BUSINESS PROCESS RE-ENGINEERING SERVICES**

Closing Date: Friday 15<sup>th</sup> of November 2019

Closing Time: 11:00 am

No late applications will be accepted

No electronic Bid applications will be accepted

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## **1. INTRODUCTION**

The Public Service Sector Education and Training Authority (PSETA) is a Sector Education and Training Authority (SETA) established in terms of section 9(1) of the Skills Development Act 97 of 1998 as amended and is classified as a National Public Entity under schedule 3A of the Public Finance Management Act, 1 of 1999.

## **2. BACKGROUND & CONTEXT**

PSETA has selected the Agile development methodology. The business rules and process flows will be clearly understood by the teams if they are part of the BPR Process. During the BPR project the functional phases will be drafted and signed off for implementation.

One of PSETA's focus areas is good governance and therefore the solutions/ process flows must adhere to the minimum standards e.g. COBIT5, PRINCEII and other requirements as stipulated by the Department of Public Services and Administration (DPSA)'s corporate governance ICT policy framework.

## **3. RATIONALE AND PURPOSE**

The main objective of conducting thorough business process reengineering is radical redesign, modernization and integration of all business processes at PSETA, with the purpose of raising the business efficiency and effectiveness at all levels across the organization.

The task comprises of a ground-breaking reengineering of the whole PSETA business system, with a final goal of significant and measurable improvement and optimization of the PSETA business system.

PSETA has identified the need to make a paradigm shift:

- from a function-oriented work performance to a service-oriented performance;
- from output-based assessment to well defined outcome-based assessments;
- from an ad-hoc piecemeal view of performance and information to an integrated data-driven view.

The above paradigm shift will enable PSETA to achieve effective governance; efficient performance; targeted development outcomes for public sector and transparent accountability mechanisms.

The purpose of this project is as follows:

- I. Establishing a cost-effective and efficient set of business processes across the whole of PSETA, through redesigning, reorganizing and reengineering of all existing business processes, as well as introducing new ones if necessary.
- II. create a solid ground for a business process management system across PSETA based on modern ICT infrastructure and solutions.
- III. Automation of manual business processes, e.g. Discretionary Grant System
- IV. The outcome of this project should be a system (indicating process flows and maps) that will be used as a base for the development and configuration of an end-to-end Enterprise Resource Planning (ERP) System.

#### **4. SCOPE OF WORK**

PSETA requires harmonization of business practices as it is essential for efficiency. The most relevant business practices in PSETA will need to be identified, mapped out, analyzed and re-designed. PSETA seeks the expertise of a consulting company (hereafter referred to as: the Consultant), who will provide the following:

- I. **Thorough as-is analysis:** In cooperation with all relevant business units, document and map all business processes and provide comparative analysis of

corresponding processes in different PSETA business units; Identify shortcomings, constraints to operational efficiency and bottlenecks in each process; Identify and analyze process inherent transaction costs for all selected business processes through activity based costing, aiming at quantifying savings in the design of new and harmonized end-to-end business processes;

II. **Thorough to-be analysis:** Based on the mapping of corresponding business processes in different PSETA business units, design results-oriented end-to-end business processes and provide detailed recommendations on business practices improvements with a focus on increased harmonization, improved effectiveness, greater efficiency and a measurable reduction of transaction costs, improving performance through KPI's.

- The AS IS and proposed TO BE processes, structures, tools and change management must be delivered on an online portal format that can run off the PSETA server (The solution must be delivered on already existing platform, solution in use by PSETA )
- TO BE process maps with indicated process controls and risks that feed into the Risk Register.
- TO BE forms, checklists, templates to be embedded into the TO BE processes.
- TO BE User Requirement Specification (URS) and Functional Requirement Specification (FRS) required as part of the final report.

III. **Action plan draft:** Based on all of the previous analyses, an action plan draft should be prepared.

IV. **Proposed methodologies / templates / tools** to be included into the TO BE system for the following ( Excel/Visio based to allow it to be built into the new ERP):

- see attached list of possible tools that will need to be carried over into the ERP (Annexure A)
- Must indicate roles and responsibilities by Process and Activity

- Must indicate process controls and risks that must feed into the Risk Register.
  - Turnaround time for each activity within the process flows.
- V. **Change management support:** The consulting company will assist PSETA with change management workshops during the implementation of the business process re-engineering project.

### ***Assumptions Underlying the Project Intervention***

The following assumptions apply regarding this project:

- Willingness of all stakeholders to participate in the activities of the project;
- Provide support and motivation to all stakeholders, especially PSETA employees, during the BPR process. Prepare them for the change, let them know what they can expect of it and convince them to embrace the change
- Services provided through PSETA systems satisfy the needs of PSETA clients;
- Key stakeholders which are exchanging information and data with PSETA are willing to cooperate and open their communication channels towards PSETA;
- Technical capacity of the key stakeholders to build services for mutual information exchange;
- Legal and other regulatory frameworks are in place to support and enable the work in hand.

### ***Roles and Responsibilities of PSETA***

PSETA will undertake the following responsibilities for the smooth execution of the project assignment:

- Provide all documents and data related to the project that are readily available;
- Ensure active participation of PSETA personnel at all levels during the whole time of the project execution;

- Facilitate consultation with PSETA officers and other stakeholders (e.g. Accounting Authority, etc.);
- Provide necessary infrastructure to conduct workshops, training and other consultations;
- Identify and constitute Project Champions from within every PSETA department at various levels to aid the consultants in execution of the project assignments;
- Constitute PSETA Steering Committee and undertake periodical reviews and extend all the support to the Consultant;
- Facilitate prompt feedback on reports and approvals of documentation submitted by the Consultant;
- Facilitate change management and training programs to be undertaken by the Consultant, example Risk Management Programs;

### **Key tasks and activities**

The project aims to capture the current state of PSETA business processes and report progress to the PSETA Steering Committee. After the Steering Committee's approval, the Consultant should develop a set of strategic and policy-based recommendations for redesign, and reengineering of all PSETA business processes.

Both the Consultant as well as PSETA personnel is included in the development of these recommendations. After reviewing the set of recommendations obtained by the Consultant, PSETA Steering Committee will make further decisions regarding the implementation plan.

The key tasks and main activities of the project are the following (but not limited to):

- 4.1. **Phase 1: Assessment** – During the first four weeks of the project, the Consultant will carry out the following activities:

4.1.1. Project Kick-off Presentations – to ensure visibility and project awareness across the whole of PSETA, the Consultant shall organize one project presentation targeted at representatives of the departments and functional areas in PSETA;

4.1.2. Discovery Workshops that:

- I. Are intensive, involving the Consultant and PSETA personnel, that assist all the stakeholders in determining how current business processes are performed;
- II. Identify the existing problems, and resolve critical business problems aimed at achieving key business objectives;
- III. Aim at explaining to the personnel and stakeholders the impact of the change and provide the change management strategy.

4.1.3. As-Is Study – Review, map and analyze current business processes including the roles and responsibilities of institutional structures and individual functionaries - vertically at all levels of administration, and horizontally across other key cross-functional departments.

4.2. **Phase 2: Strategy Building** – During the second eight weeks of the project, the Consultant will carry out the following activities:

4.2.1. To-Be Study – Provide a detailed study of new business processes by mapping out the PSETA business objectives with key stakeholders against all of the processes introduced, including the roles and responsibilities of institutional structures and individual functionaries - vertically at all levels of administration, and horizontally across other key cross-functional departments;

4.2.2. Gap analysis – Analyze performance and structures of current business processes and the redefined (improved) processes, in

order to clearly point-out the benefits, and identify the possible radical changes that could impact other aspects of PSETA business systems;

4.2.3. BPR Recommendations:

- I. Map and document the transformation process using appropriate BPR tools, methods, techniques and notations. Redesign structures and processes of PSETA across all levels in order to deliver high standards of service, reduce duplication of effort, encourage harmonized and streamlined procedures as well as clarify roles and responsibilities at every level of administration.
- II. Identify the best practices for adoption with details of alternatives and their suitability.
- III. Conduct a thorough gap analysis.
- IV. Propose appropriate BPR tools such as Business Activity Monitoring (BAM), Process Mining, etcetera to fulfill the process.

4.2.4. Action plan – The Consultant is expected to formulate an action plan for preparing activities in order to carry out the complex works of business process reengineering;

4.2.5. Change Management and Capacity Building – The Consultant is expected to design a viable and detailed change management and capacity building strategy and execute the same, with the assistance of PSETA.

4.2.6. Close out report - The Consultant will prepare a close out report and present to the Steering Committee for endorsement.

4.2.7. Close out workshop – The Consultant will organize a close out workshop in order to present the final results of this project, and underline the impact of the BPR results to PSETA.

## 5. DELIVERABLES AND EXPECTED OUTCOMES

All deliverables, such as reports, plans and other artifacts, should be delivered to PSETA steering team for acceptance and/or approval, in order to reach the milestone planned and continue to the next project phase. The project will result in the following deliverables and work products, which will be make available both in all suitable electronic (html, pdf, and doc) and printed forms:

- Phase 1
  - **Project Inception Report**, which shall consist of the detailed Project Work Plan to carry out the assignment. The Project Work Plan shall have details of the Project team, detailed timelines, detailed note on the proposed approach and methodology as well as an identified list of key stakeholders. The terms of reference may be improved and refined for better achieving the outcomes, through mutual discussions at the inception report stage;
  - **As-Is Study Report**, including stakeholder analysis, identification of sample size for study, identification of services, and detailed process diagrams for the current business processes. The report should clearly provide references to extant documentation. The report shall also identify current threats to the organization, bottlenecks and possibilities for improvement.
- Phase 2
  - **To-Be Study Report**, including new business processes by iterating and validating the PSETA business objectives with key stakeholders against every of the processes introduced, including the roles and responsibilities of institutional structures and individual functionaries;

- **Comparative Report (Gap Analysis)**, analyzing performance and structures of the current business processes and the redefined (improved) processes, in order to clearly point-out the benefits, but also the possible radical changes that could impact other aspects of PSETA business systems. Basically, this report should contain a gap analysis.
  - **Business Process Reengineering Recommendations Report**, including all areas outlined in the scope of work and as modified through discussions during Phase I, specifically detailing areas that need administrative amendments of rules. Draft rules and administrative amendments required to give effect to the accepted recommendations;
  - **Action plan**, which clearly defines, in a step-by step manner, the scale up, approach and methodology. Action Plan will be one consolidated document, which shall include tactics, activities and operational goals to be implemented with specified time frames, detailed implementation approach/schedule, anticipated outcomes, risk mitigation plans, and related financial and other resource estimates, such as detailed cost estimation and project timeline;
  - **Detailed Training and Change Management Plan**, for achieving the proposed recommendations, including training workshops for employees of PSETA, at various levels, which is determined in cooperation with PSETA management;
  - **Final Project Report**, containing the following sections: Project Summary; Introduction; Objectives Statement; Methods and Resources; Project Results (quantitative and qualitative results, with proper visualizations); Conclusions and Discussion (findings, project usefulness, challenges and limitations, future work directions, lessons learned); Outreach (describing very briefly the type of outreach that the project did, or expect to do); References; Addenda (project-related materials and resources).
- Across all phases, periodically:

- **Monthly Progress Reports (MPR) and Periodic Reports**, consisting of progress against agreed work plan and report of existing/possible constraints for mitigation should be submitted to the consultant, at least during the first year, in order to properly and objectively evaluate the improvement. MPR will also include presentations to the Project Governance teams and other consultant(s) of PSETA for mutual learning. This will also include workshops related reports, focus group discussion (FGD) reports, minutes, record of discussions, and other documentation that form part of the assignment.

## 6. METHODOLOGY AND APPROACH

The following table provides detailed (but not limited to) key tasks and activities to be performed by the consultants at each phase of the assignment, timelines and the deliverables thereof.

<b>Phases</b>	<b>Activities</b>	<b>Deliverables</b>	<b>Timelines</b>
I. Assessment	<ul style="list-style-type: none"> <li>• Project Kick-off Presentations</li> <li>• Discovery Workshops and study of the present structure, functions and services of PSETA (part of the As-Is Study)</li> <li>• Study of the existing back-end processes in and all over PSETA (part of the As-Is Study)</li> <li>• Identify the PSETA key processes (part of the As-Is Study)</li> </ul>	<ul style="list-style-type: none"> <li>• Project Inception Report</li> <li>• As-Is Study Report</li> <li>• Monthly Progress Reports (MPR) and Periodic Reports</li> </ul>	4 weeks

<p style="text-align: center;"><b>II. Strategy Building</b></p>	<ul style="list-style-type: none"> <li>• Study the existing processes for both Core and Support functions, including validation workshops</li> <li>• Design of the re-engineered processes for key services (part of a To-Be study)</li> <li>• Assist PSETA departments and other organizational units in identification of regulatory / statutory changes and draft the changes</li> <li>• Preparing the BPR Recommendations for PSETA</li> <li>• Prepare change management and communication strategies along with capacity building</li> <li>• Conduct Training Need Assessment (TNA) for the change in PSETA business processes</li> <li>• Wrap-up event</li> </ul>	<ul style="list-style-type: none"> <li>• To-Be Study Report</li> <li>• As-Is/To-Be Comparative Report (Gap Analysis)</li> <li>• Business Process Reengineering Recommendations Report</li> <li>• Focus Report on E-Governance</li> <li>• Focus Report on Citizen Centric Administration</li> <li>• Monthly Progress Reports (MPR) and Periodic Reports</li> <li>• Action plan</li> <li>• Monthly Progress Reports (MPR) and Periodic Reports</li> <li>• Detailed Training and Change Management Plan</li> <li>• Project Final Report</li> </ul>	<p style="text-align: center;"><b>8 weeks</b></p>
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## **7. COMPETENCY AND EXPERTISE REQUIREMENTS**

This is a full time consultancy project. It is expected that the core team of key experts and the desired number of suitable consultants (named here as other experts) shall be

available on-site as needed during the entire duration of the project. This core team will be duly supported by off-site teams of senior consultants, subject matter and/or domain experts, etc. An indicative profile of such consultants is given below.

### *1.1. Project Team*

The Consultant shall provide the consultancy of the following staff (consisted of key experts and other experts) and expertise (but not limited to):

- **A project manager / team leader** – ideally, governance or restructuring expert; s/he shall provide the overall guidance to the project. Also a professional project management consultant with at least 10 years of project management experience. S/he will provide a comprehensive project management support to PSETA during the project;
- **Process re-engineering expert/s** – process re-engineering expert/s with relevant experience in study of the government processes, government process reengineering, institutional strengthening, proposal management, vendor evaluation, program management etc.
- **A business process designer** – an expert with deep knowledge of standard and widely-accepted business process modeling methods, techniques, tools, languages and notations, its analysis in static terms and simulation in dynamic conditions, process bottlenecks detection, etc.;
- **Other expert/s** – various experts e.g. with specific experience in implementation of large scale change management, process improvement, capacity building and training programs for government and public entities.

## **8. TIME LINES AND LOGISTICS OF THE PROJECT**

The selected Consultants are expected to start working on the assignments immediately upon signing the contract and submit the initial report and present the working team within 14 working days of the contract.

## **1.2. Location**

Since the project requires regular interaction with the employees and officers at PSETA, it is essential that the selected consultants set up a project office in Pretoria, Hatfield with the required number of resources. It is also required that the consultants appoint a project manager, which has sufficient experience to lead the team on-site and provide overall guidance to the team and consultancy to PSETA.

The Consultant will be responsible for all travel, transport and accommodation costs in relation to the assignment

## **1.3. Commencement Date & Period of Performance**

The duration of the contract will be for a period of three (3) months from the date of appointment.

## **1.4. Governance Structure and Ownership**

The PSETA will constitute a Steering Committee for periodical monitoring of the assignment and for providing necessary guidance and coordination from time to time. All documents, software, material, and reports produced under this assignment, in any form whatsoever, will be the sole property of PSETA and the consultant shall not use, replicate, and reproduce the same in any manner without the written consent of PSETA

## **9. QUALITY AND REPORTING REQUIREMENTS**

The service provider will report to the Corporate Service Executive as and when required. Quality management of the service must be ensured by the service provider and will be overseen by the Corporate Service Executive.

## **10. INTELLECTUAL PROPERTY**

All the information derived from this assignment will remain the property of PSETA. This includes data gathering tools, raw data and all reports. Publication of any information emanating from this assignment is prohibited unless permission to cite the findings is approved by the PSETA.

## 11. STRUCTURE OF A PROPOSAL

The structure and contents of a proposal required from the service provider is shown in Box 1 below.

### **Box 1. Structure of a proposal**

The prospective service provider must provide the following details.

- A. Understanding of the Business Process Re-engineering methodologies and techniques.
- B. Understanding of the SETA environment and the Public Service sector.
- C. Approach, design and methodology for the project (e.g. literature and documentation review, data collection, tools, sample, suggestions for elaboration or changes to scope and methodology as outlined in the TOR, examples of questions suggested, process elements)
- D. Detailed project plan to include all deliverables indicated (including roles for different researchers per activity and time frame linked to activities – it is particularly important that effort levels for key resources are clear)
- E. Detailed activity-based budget (in South African Rand, including VAT). The proposed project costs must be all inclusive (i.e. including incidental costs, travel costs, disbursements, etc.)
- F. Competence (include list of similar projects undertaken of main contractor and sub-contractors, making clear who did what, and contact people for references)
- G. Team (team members and their responsibilities)

## 12. PRICING

The proposed total pricing must be inclusive of vat indicating the breakdown of the cost.

The PSETA may require a breakdown of rates on any of the services/items priced and service providers are required to provide same.

The PSETA reserves the right to negotiate the selection/prioritization of deliverables in line with the contract price.

### 13. EVALUATION PROCESS

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for B-BBEE, once the minimum functionality criteria are met.

12.1 The evaluation will be based on:

<b>Phase 1 : Functionality Evaluation</b>	
<b>Phase 2 : Preferential Point System</b>	<b>Points</b>
Price	80
B-BBEE status level of contribution	20
<b>Total</b>	<b>100</b>

#### 12.1.1 PHASE 1 – FUNCTIONALITY EVALUATION

Bids must meet the minimum eligibility criteria in respect of functionality of 75 points out of a 100 points that will be awarded for functionality before they are considered further.

Any bid that does not meet the minimum eligibility threshold will be automatically disqualified.

The functionality criteria together with the maximum points to be awarded are set out below:

**Phase 1**

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
1	Submission of a proposal with Project plan displaying an understanding and knowledge of Business Process Re-engineering methodologies and techniques in the Public service and SETA landscape.	<p>Clear proposal with a project plan outlining the following:</p> <ul style="list-style-type: none"> <li>• Approach, design and methodology for the project (e.g. literature and documentation review, data collection, tools, sample, suggestions for elaboration or changes to scope and methodology as outlined in the TOR, examples of questions suggested, process elements)</li> <li>• Detailed project plan to include all deliverables indicated (including roles for different project team members per activity and time frame linked to activities – it is particularly important that effort levels for key resources are clear)</li> <li>• Detailed activity-based budget (in South African Rand, including VAT). The proposed project costs must be all inclusive (i.e. including</li> </ul>	<p><b>NB: All proposals must cover all sections outlined under the guidelines for criteria application column</b></p> <ul style="list-style-type: none"> <li>• 1 = Proposal and project plan not acceptable (<b>all areas not covered</b>).</li> <li>• 2 = Poorly written proposal and a project plan (<b>few areas covered</b>)</li> <li>• 3 = Average proposal (<b>most areas covered</b>)</li> <li>• 4 = Good proposal (<b>all areas covered but not in depth</b>)</li> <li>• 5= Excellent detailed proposal (<b>all areas thoroughly addressed in depth</b>)</li> </ul>	40

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
		incidental costs, travel costs, disbursements, etc.)		
2	History of successful implementation of similar projects.	<ul style="list-style-type: none"> <li>• Three reports of similar projects concluded within the last five (5) years.</li> </ul> <p>The sample reports must be accompanied by relevant reference letters:</p> <ul style="list-style-type: none"> <li>• Three (3) reference letters to be submitted as proof in support of this requirement containing the following: <ul style="list-style-type: none"> <li>➤ Name of the project/company</li> <li>➤ Nature of work conducted</li> <li>➤ Date when project was undertaken</li> <li>➤ Duration of the project</li> </ul> </li> </ul> <p><b>NB! Reference letters must be on company letter head, signed and dated</b></p>	<p><b>NB: The sample reports must be accompanied by relevant reference letters.</b></p> <ul style="list-style-type: none"> <li>• 1 = No reports and no reference provided of similar work undertaken previously.</li> <li>• 2 = No reports provided however 3 relevant reference letters provided or no reference letters and 3 reports provided of previous similar work.</li> <li>• 3 = 1 sample report of previous work in similar project as well as 1 relevant reference letters provided provided.</li> </ul>	25

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			<ul style="list-style-type: none"> <li>• 4 = 2 sample reports of previous work in similar project(s) as well as 2 relevant letters provided.</li> <li>• 5 = 3 or more sample reports of previous work in similar project(s) as well as 3 relevant letters provided.</li> </ul>	
3	Proof of capacity and capability to conduct Business Process Re-engineering for PSETA.	<ul style="list-style-type: none"> <li>• Submit the CVs with the following:</li> <li>• A project manager / team leader – ideally, governance or restructuring expert; s/he shall provide the overall guidance to the project. Also a professional project management consultant with at least 10 years of project management experience. S/he will provide a comprehensive project management support to PSETA during the project;</li> </ul>	<ul style="list-style-type: none"> <li>• 1= No submission of CV and/ or certified copies of project management qualifications</li> <li>• 2= CV, Certified copies of project management qualifications and less than 5 years' experience</li> <li>• 3 = CV, Certified copies of project management qualifications and a minimum of 5 years' experience.</li> </ul>	10

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			<ul style="list-style-type: none"> <li>• 4 = CV, Certified copies of project management qualifications and a minimum of 6 to 9 years' experience.</li> <li>• 5 = CV, Certified copies of project management qualifications and 10 years and above experience.</li> </ul> <p><b>NB: Uncertified copies of qualifications will be not be considered for evaluation</b></p>	
		<ul style="list-style-type: none"> <li>• Submit the CVs with the following:</li> <li>• The Project team should have at least 10 years of aggregated related experience in the following areas:</li> <li>• Process expert/s – process re-engineering expert/s with relevant experience and qualifications in study of the government processes, government process reengineering,</li> </ul>	<ul style="list-style-type: none"> <li>• 1= No submission of CV and/ or certified copies of relevant qualifications</li> <li>• 2= CV, Certified copies of relevant qualifications and less than 5 years' experience</li> <li>• 3 = CV, Certified copies of relevant qualifications and a minimum of 5 years' experience.</li> </ul>	15

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
		<p>institutional strengthening, proposal management, vendor evaluation, program management etc.;</p> <ul style="list-style-type: none"> <li>• A business process designer – an expert with deep knowledge of standard and widely-accepted business process modeling methods, techniques, tools, languages and notations, its analysis in static terms and simulation in dynamic conditions, process bottlenecks detection, etc.;</li> <li>• Other expert/s – various experts e.g. with specific experience in implementation of large scale change management, process improvement, capacity building and training programs for government and public entities.</li> <li>• Attach CV and certified copies of qualifications. Proof of SAQA evaluation must be provided in the case of foreign qualifications.</li> </ul>	<ul style="list-style-type: none"> <li>• 4 = CV, Certified copies of relevant qualifications and a minimum of 6 to 9 years' experience.</li> <li>• 5 = CV, Certified copies of relevant qualifications and 10 years and above experience.</li> <li>• <b>NB: Uncertified copies of qualifications will be not be considered for evaluation</b></li> </ul>	

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
4	Readiness to implement and complete within the required timeframes	<ul style="list-style-type: none"> <li>• Clear implementation plan with a Gantt chart and timelines of the project at each stage.</li> </ul>	<ul style="list-style-type: none"> <li>• 1 = No submission of implementation plan with a Gantt chart</li> <li>• 2 = Implementation plan with a Gantt chart and timelines of the project not detailed.</li> <li>• 3 = Implementation plan with a Gantt chart and timelines of the project that is realistic and covering most stages of the project.</li> <li>• 4 = Implementation plan with a Gantt chart and timelines of the project that are realistic and covering all areas but not in depth.</li> <li>• 5 = Implementation plan with a Gantt chart and timelines of the project that are realistic, detailed, with</li> </ul>	10

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			all areas of the project plan covered in-depth.	
	<b>Total</b>			<b>100</b>

#### 12.1.2. **PHASE 2 – PREFERENTIAL POINT SYSTEM SCORING**

Bids must score a minimum of 75 points in the functionality evaluation phase 1 to proceed to phase 2 of the evaluation.

Applicants meeting the minimum functionality criteria, will then be scored on the 80/20 principle, based on their price and B-BBEE ratings respectively.

The applicant with the highest total number of points will be awarded the contract.

### **14. FORMAT OF THE BID SUBMISSION**

#### **Technical Proposal**

1. Letter of Application (on your company letter head, indicating bid reference number)
2. Company Profile
3. Team member names and roles
4. Track record and experience
5. Project Plan
6. Submission of all applicable documents as indicated below:
  - An original, valid Tax clearance certificate or Proof of exemption from SARS;
  - A valid B-BBEE Status Level Verification certificate, copies to be certified
  - The completed and signed Standard Bidding documents (SBD)
    - SBD 1
    - SBD 4
    - SBD 6.1
    - SBD 8
    - SBD 9
  - Certified copy of the registration document of the organisation;

- Proof of registration with the Treasury Central Supplier Database (CSD). A CSD Registration report with all information verified must be submitted.

## **Financial Proposal**

### 7. Pricing Schedule

## **15. IMPORTANT INFORMATION FOR BIDDERS**

1. Proposals must be submitted in four (4) hard copies including one (1) original.
2. Non-registration on the CSD or non-verified information on the CSD Registration Report will render your proposal as disqualified.
3. Consortium/Joint Ventures must submit their consolidated tax clearance certificates, B-BBEE certificates and other relevant documents to qualify.
4. All the SBD documents must be completed, signed and submitted. Failure to do so will disqualify the bid.

### **Bid applications must be submitted to:**

#### **Ms Anne Gideon**

Manager: Supply Chain Management

The PSETA

2<sup>nd</sup> Floor, Sanlam Building

353 Festival Street, Hatfield

Pretoria

**Closing date is Friday , 15th of November 2019, closing time is 11:00 am.**

No late applications will be accepted

No electronic Bid applications will be accepted

Please direct all queries to **Ms Anne Gideon** via email on [anneg@pseta.org.za](mailto:anneg@pseta.org.za) or telephonically on 012-4235700

## Annexure A

			DATA INPUT TO SYSTEM AND TOOL													
SPECIFIC DEPARTMENTAL TOOLS LIST	CONTROLLED BY	REASON FOR IMPLEMENTATION AND BENEFITS	QUALITY	GOVERNANCE	GRANTS	PROJECTS	RESEARCH & SKILLS DEVELOPMENT	HUMAN RESOURCES	SUPPLY CHAIN			ETQA	STAKEHOLDER RELATIONSHIP		LEARNING PROGRAMMES	FINANCE
STAKEHOLDER COMPLAINTS TOOL	QUALITY	To controlling and analyse the complaints from the stakeholder.	x	x		x	x	x	x			x	x		x	x
STAKEHOLDER SURVEY TOOL	QUALITY	Point of view from the stakeholder to see the quality performance and satisfaction from each of the departmental with in PSETA	x	x												
AUDIT AND QUALITY MONITORING PLANNING TOOL	QUALITY	Planning and Scheduling of a quality control plan tool to monitor the processes on critical points based on the risk register.	x	x	x	x	x	x	x			x	x		x	x
QUALITY DEPARTMENTAL PERCEPTION TOOL	QUALITY	To analyses the internal perception of quality and processes to conform to the PSETA objectives	x	x	x	x	x	x	x			x	x		x	x
QMR/SETMIS TOOL	GOVERNANCE / QUALITY	Automating the programme KPI's numbers and detail from the stakeholders and measuring the Quarterly performance, to create an intervention on monthly performance on the regions based on the results.	x	x												
RISK TOOL	GOVERNANCE / QUALITY	Measuring the risk from an operational level in real time manner, to detect early prevention to the business top 10 and to 30 risks	X	x	x	x	x	x	x			x	x		x	x
COBIT TOOL	GOVERNANCE / QUALITY	Automating ICT Strategic Compliance measurement		X												

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MONITORING TOOL	ETQA /QUALITY	Automating the ETQA reporting for the supplier and performance at the stakeholders. And by consolidating the data in real time manner.	x	x							x				
DEPARTMENT PERFORMANCE TOOL	HUMAN RESOURCES	Automating and Consolidating the data and analysing the planning of the performance cycle throw out the financial year. To detect outstanding employees performances and trending the employee and departmental performance.	x	x	x	x	x	x	x		x	x		x	x
PLANNING AND TRAINING TOOL	HUMAN RESOURCES	Measuring the training completed by each % employee and programme.	x	x	x	x	x	x	x		x	x		x	x
IT REQUEST AND MONITORING TOOL	IT	Automating the IT request process, and analysing defects and requests submitted by the department. (as per the COBIT tool)	x	x	x	x	x	x	x		x	x		x	x
SUPPLY AND MONITORING TOOL	SUPPLY CHAIN	Evaluating and monitoring the supplier on the contract based by performance and quality.	x	x	x	x	x	x	x		x	x		x	x
SSP TOOL	RESEARCH & SKILLS DEVELOPMENT	Creating a central file and template tool for the SSP report, to measure the section completeness by the respective time lines and baseline quality measuring point.	x	x	x	x	x	x	x		x	x		x	x
EVENTS PLANNING TOOL	STAKE HOLDER RELATIONSHIP	Creating a centralized events planning tool for PSETA were a requester can log an event into the system. To measure what needs to be used for the event and where and date it shale be held.	x	x	x	x	x	x	x		x	x		x	x
EVENTS ANALYSING TOOL	STAKE HOLDER RELATIONSHIP	Based on the event that has taking place, is to measure to outcomes of the event to reduce defects and lessons learned	x	x								x			

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FILE BOOKINGS TOOL	RESECTION	Logging in a file from the stakeholder so that the respective department can view what is been allocated.	x	x	x	x	x	x	x			x	x		x	x
SCHEDULE AND EVALUATING PLANNING TOOL	LEARNING PROGRAMMES	Automating the scheduling and planning for the supplier and manpower planning on the evaluation report and on the programme performance at the service provider. And by consolidating the data in real time manner.	x	x	x	x	x	x	x			x	x		x	x
MEETING ACTION AND TO DO LIST TOOL	MANAGEMENT /QUALITY	Tracking and monitoring tool by allocation actions with in the MANCO meeting.	x	x	x	x	x	x	x			x	x		x	x