planning, monitoring & evaluation

Department:
Planning, Monitoring and Evaluation
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

NDP 2030

SCM /Tender Ref #:	DPME 05-2021/22

Request for proposals for:	Appointment of a bidder to provide resources to develop a centralised data management and analytical system (CDMAS) for the Department of Planning Monitoring and Evaluation (DPME)

Bid closing date and time as well as the date and time of briefing session (if any) are indicated on the attached SBD1. Quotations / proposals received after the closing date and time indicated on SBD 1 will not be accepted.

Bidders must provide <u>one original</u> and <u>5 (five) copies</u> of proposals submitted.

Only 1 (one) original price proposal and SBDs are required.

Estimated project start date:	Expected project duration (Months)
15/01/2022	**36 months**

1. BID INFORMATION

Information and guidelines on the format and delivery of bids are contained in the attached bid documents.
Please take note of the closing date and date of compulsory briefing session.

2. PROPOSAL FORMAT

A detailed proposal in response to this ToR must be submitted. The proposal should contain all the information required to evaluate the bid against the requirements stipulated in this terms of reference. The following must be attached to the proposal as annexures:

- **Annexure B1**: Proposed team (Must use attached Excel template)
- **Annexure B2**: Summary of past experience of team members (Must use attached Excel template)
- **Annexure B3**: Deliverables and allocation of time to team members (Must use attached Excel template).
- **Annexure B4:** Pricing information. Price proposals must <u>include VAT</u> and should be fully inclusive to deliver <u>all outputs</u> indicated in the terms of reference (Must use attached Excel template). The published terms of reference (this document, including Annexure A to this document). In addition, the costing break down of per hour on the qualification of the person/s providing the support/service and maintenance should be included.
- All other forms / certificates required (see bid documents).

3. CONDITIONS OF BID

Detailed conditions applicable to all bids are contained in the bid documents accompanying this Terms of Reference. Only suppliers that meet all the requirements stipulated in the terms of reference and bid documents will be considered.

No late bids will be accepted. **Note:** Only bids from service providers that attended the compulsory briefing session (if specified above) will be considered. Bids must be valid for a minimum period of 120 days after the closing date.

ENQUIRIES		
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1. BACKGROUND

Annexure A contains a detailed description of the requirements for this project, including:
- Background / context
- Problem statement / purpose
- Objectives and scope of project
- Proposed methodology / approach
- Deliverables and time frames

2. EXPERIENCE / SKILLS / TEAM COMPOSITION / PAST PERFORMANCE

The attached spread sheet (Annexure B) <u>must</u> be used to summarise qualifications, skills and past experience and to cost the proposal.

2.1. Company Experience

- Bidder must have at least 5 years in Business Intelligence (BI) and Data Analytics solutions
- Bidder must have worked on a minimum of 3 projects in BI and Data Analytics
- Bidder must propose a minimum of 2 resources per role to ensure business continuity

2.2. Team composition (Resources)

2.2.1. Empowerment requirements

The proposed team must meet the following empowerment requirements:
- **Black PDI%:** At least 20% of the person-days required to complete this project must be allocated to Previously Disadvantaged Individuals (PDIs)[1]; and
- **Gender %:** At least 20% of the person-days required to complete this project must be allocated to women; **OR**
- **Youth%:** At least 20% of the person-days required to complete this project must be allocated to youth (persons aged 35 or younger).

Annexure B1 must be completed and the required details of each team member must be provided. Team members indicated in the proposal must be available for the duration of the project and must play a meaningful role in the project. Replacement of team members may only be done in consultation with DPME and replacement team members must have the same PDI profile as well as qualifications / experience as those they are replacing.

2.2.2. Qualifications and Experience required

Bidders will demonstrate adequate experience through the number, types and geographical spread of projects/assignments undertaken. The attached template must be used to summarise experience and the proposal must contain details about projects worked on including roles, cost and duration as well as names and contact persons at contracting party.

Roles	Qualifications	Experience	Skills
Project manager*	Minimum: Agile Project management Practitioner certification. Certificate to be attached to CV.	Minimum: Successfully managed and completed at least 3 system development projects i.e., Business Intelligence, Data Science/Analytics	- Project Planning, monitoring and reporting - Resource planning and management - Risk management - Quality management - Change management

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[1] By Black PDIs we mean South African citizens who are Black, Indian, or Coloured.

			• Effective communication
Business Intelligence developer	Minimum: MS Data Analytics Certification with Power-BI. Certificate to be attached to CV.	Minimum: At least 5 years' work experience in developing Business Intelligence solutions	• Mapping of various databases • Writing of technical documentations • Data Warehousing • Data modelling • Visualization Extraction, Transformation and Loading (ETL) • Microsoft SQL Server: Analysis services, Integration Services, Reporting Services and Databases • Microsoft PowerBI Server • C#, JavaScript, R
Solution Architect*	Minimum: TOGAF 9.1 certification or higher. Certificate to be attached to CV.	Minimum: At least 5 years work experience in designing and implementing BI solution	• Designing of complex BI solutions • OLTP and OLAP database models • IT architecture • Software Engineering
Business Analyst*	Minimum: Business Analysis certification. Certificate to be attached to CV.	Minimum: At least 5 years work experience in ICT project	• Business or user requirements gathering, analysis and documentation • Development of uses cases, activity diagrams and etc • Prioritization of requirements
Microsoft Full-stack software Developer	Minimum: Microsoft Full stack software developer certification. Certificate to be attached to CV.	Minimum: At least 5 years work experience in software development	• Relational databases • Incorporate database logic • API testing Development and documentation. • Implement authentication and authorization • MVC design patterns • Development of REST API • Deployment into containerized environment • An understand of Docker container to a Kubernetes
Test/QA Analyst*	Minimum: Software testing certification. Certificate to be attached to CV.	Minimum: At least 5 years' work experience in Test/QA roles	• Planning of tests • Development of test cases and related documentation • Functional and non-functional testing

Database Designer/Administrator*	Minimum: Microsoft SQL Server ccertification (Database development and administration). Certificate to be attached to CV.	Minimum: At least 5 years' work experience in Database design/administrator roles	• Database design and development. • SQL queries, stored procedures and functions. • Database security • Database optimization • Microsoft SQL Server: Analysis services, Integration Services, Reporting Services and Databases
GIS Specialist	Minimum: Professional registration in GIS. Certificate to be attached to CV.	Minimum: At least 5 years' work experience in GIS roles including developing applications.	• Spatial analysis • Designing digital map • Geocoding projections • Developing mapping applications and tools • Produce reports on geographic data utilizing data visualizations. • Managing a digital library of geographic maps in various file types
Data Analyst	Minimum: Qualification in Statistics or Data Science. Certificate to be attached to CV.	Minimum: At least 5 years work experience in data wrangling, modelling, mining, statistics	• Statistical Data analysis • Data mining • Data modelling
Data Governance (Management) Specialist*	Minimum: Certification in data governance. Certificate to be attached to CV.	Minimum: At least 5 years work experience in Data Governance	• Data governance and management • Writing skills

One team member can have more than one of the roles indicated. However, ensure the team member meets the minimum for each role represented e.g. if a member is both a data specialist and business analyst, the member should have minimum 5 years of data specialist and minimum 5 years business analyst. If a job combined these roles, clearly demonstrate.

** If role needs more than one resource, the score will be combined for all the experts – **All** experts must meet minimum criteria stipulated above to receive a score of 3.*

2.3. Confirmation of experience, qualification and availability

The following must be submitted for each of the proposed team members:
- Written confirmation of availability (signed by the proposed team member) for the expected duration of the project to produce the deliverable(s) as indicated in Annexure B.
- Detailed CV indicating qualifications, previous experience as well as letters of reference (references must be contactable).
- Certified copies of qualifications.

DPME reserves the right to verify all qualifications through the South African Qualifications Authority and to verify experience indicated on CVs with third parties.

2.4. Past performance

The past performance of bidders in executing similar projects will be evaluated using the reference letters supplied by bidders as well as any other information available to the panel. Below satisfactory performance

on a particular project may only be considered if such performance was communicated to the bidder by the contracting party and the bidder was given a reasonable opportunity to correct any deficiencies highlighted by the contracting party. The department reserves the right to request a due diligent exercise to confirm if the service provider has always provided what they said they will provide. The Department reserves the right to reject a bid if the service provider failed to perform satisfactorily on similar projects.

2.4.1: Summary of Past Performance and Experience

Company track record	Requirement	Experience
Company past performance, Company Track Record and Experience	Minimum: The bidder should demonstrate previous work experience through providing reference letters from previous customers. The bidder must demonstrate experience and knowledge of developing and implementing BI and Analytics solutions. Provide at least three copies of valid letters from Customers indicating: a) the bidder names b) the bidder scope of work performed for the Customer c) start and end date for the work done d) Technologies used to deliver for the Customer Scope of Work. **Note:** All letters must be in writing dated, signed and on a letterhead of the entity that issued the letter.	Minimum: Provided three or more valid customer reference letters

2.5. Project management

2.5.1. This project will be implemented in phases following an Agile Project Management approach. Each phase will be based on a Minimum Viable Product (MVP). Bidders will be expected to provide an overview in form of a project management plan, of how they will approach project management for this project. A detailed project plan and statement of work will be developed and managed by both DPME and bidder. A Service Level Agreement (SLA) will be concluded with the successful bidder, whereby timeframes and deliverables will be determined.

2.5.2. Provide list of risks and mitigation plan, assumptions, inclusions and exclusions associated with this project.

3. COSTING METHODOLOGY

Prices must be <u>inclusive of VAT</u> (if VAT registered) and must include all costs to fully execute all deliverables indicated in this ToR. No variation in contract price will be permitted. **Annexure B4** must be used to summarise costing. **Prices indicated must be hourly rate per resource all-inclusive (e.g. S&T, travel). The resource must be based in Gauteng Province and expected to work in DPME offices located in Pretoria.**

The project must be costed on the time and material basis. The bidder to indicate an hourly rate per resource for each MVP developed, all-inclusive of VAT. Payments will be done only those resources who have been allocated work as agreed by both DPME and bidder project managers.

4. EVALUATION OF BIDS

4.1. Administrative requirements

Annexures B1 to B4 **must** be completed using Microsoft Excel or compatible software. Annexures completed by hand (in writing) will not be accepted and such bids will be regarded as administratively non-compliant.

Only bids / quotes that comply with all administrative requirements and that submitted all required bid documents (acceptable bids) will be considered during the functional evaluation phase. Only acceptable bids / quotes will be scored by the Bid Evaluation Committee against the functional criteria indicated in this Terms of Reference.

4.2. Scoring of bids (functional criteria)

The following weighting and scoring system will be applied to the evaluation of all functional criteria:

Weight allocation	Scoring system
1 – Value adding requirement (minimum score of 2)	1 – Does not comply with the requirements
3 – Important requirement (minimum score of 9)	2 – Partial compliance with requirements
5 – Essential requirement / integral part of project (minimum score of 15)	3 – Full compliance with requirements
	4 – Exceeds requirements

Score per criteria: The final score obtained by a bidder for each criterion will be calculated by multiplying the weight and the score indicated by each Bid Evaluation Panel member and then by averaging the scores of all panel members. The average score per criteria is expressed as a number.

The **overall score** obtained by a bidder (expressed as a percentage) will be calculated as follows:

$$Overall\ Score\ (\%) = \frac{Sum\ of\ average\ scores\ for\ all\ criteria}{Sum\ of\ weights\ X\ 4}\ X\ 100$$

4.3. Functional evaluation Part 1 – Quantitative criteria

Part 1: Minimum functional requirements: Only bids that scored at least the minimum score for each criteria will proceed to functional evaluation part 2. In cases where bidders submitted insufficient evidence or where evidence is ambiguous, bidders may be requested to provide additional evidence and may be re-scored based on this information. Additional information submitted may only be used as evidence to substantiate what is already contained in the proposal. The costing and content of proposals may not be amended.

Functional Evaluation Criteria		Weight	Min. Score
1.1	**Team composition (par 2.2.1 of ToR and Annexures B and B1):** 1= Proposed team does not meet the empowerment criteria. 3= Proposed team meets the empowerment criteria. 4= Proposed team exceeds the empowerment criteria.	3	*9*

Functional Evaluation Criteria		Weight	Min. Score
1.2	**Project manager* (par 2.2.2 of ToR):** 1= The project manager does not meet the minimum requirements for either qualifications or experience or skills. 3= The project manager meets all of the minimum qualifications and experience and skills. 4= The project manager meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.3	**Business Intelligence developer (par 2.2.2 of ToR):** 1= The Business Intelligence developer does not meet the minimum requirements for either qualifications or experience or skills. 3= The Business Intelligence developer meets all of the minimum qualifications and experience and skills. 4= The Business Intelligence developer meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.4	**Solution architect* (par 2.2.2 of ToR):** 1= The Solution architect does not meet the minimum requirements for either qualifications or experience or skills. 3= The Solution architect meets all of the minimum qualifications and experience and skills. 4= The Solution architect meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.5	**Business Analyst* (par 2.2.2 of ToR):** 1= The Business analyst does not meet the minimum requirements for either qualifications or experience or skills. 3= The Business analyst meets all of the minimum qualifications and experience and skills. 4= The Business analyst meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.6	**Microsoft Full-stack software Developer* (par 2.2.2 of ToR):** 1= The Microsoft Full-stack software Developer does not meet the minimum requirements for either qualifications or experience or skills. 3= The Microsoft Full-stack software Developer meets all of the minimum qualifications and experience and skills. 4= The Microsoft Full-stack software Developer meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.7	**Test/QA Analyst* (par 2.2.2 of ToR):** 1= The Test/QA Analyst does not meet the minimum requirements for either qualifications or experience or skills. 3= The Test/QA Analyst meets all of the minimum qualifications and experience and skills. 4= The Test/QA Analyst meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.8	**Database Designer/Administrator * (par 2.2.2 of ToR):** 1= The Database Designer/Administrator does not meet the minimum requirements for either qualifications or experience or skills. 3= The Database Designer/Administrator meets all of the minimum qualifications and experience and skills. 4= The Database Designer/Administrator meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.9	**GIS Specialist (par 2.2.2 of ToR):** 1= The GIS Specialist does not meet the minimum requirements for either qualifications or experience or skills. 3= The GIS Specialist meets all of the minimum qualifications and experience and skills. 4= The GIS Specialist meets all minimum requirements and exceeds in experience and skills.	3	*9*

Functional Evaluation Criteria		Weight	Min. Score
1.10	**Data Analyst (par 2.2.2 of ToR):** 1= The Data Analyst does not meet the minimum requirements for either qualifications or experience or skills. 3= The Data Analyst meets all of the minimum qualifications and experience and skills. 4= The Data Analyst meets all minimum requirements and exceeds in experience and skills.	3	*9*
1.11	**Data Governance (Management) Specialist* (par 2.2.2 of ToR):** 1= The Data Governance (Management) Specialist* does not meet the minimum requirements for either qualifications or experience or skills. 3= The Data Governance (Management) Specialist* meets all of the minimum qualifications and experience and skills. 4= The Data Governance (Management) Specialist* meets all minimum requirements and exceeds in experience and skills.	3	*9*

* One team member can have more than one of the roles indicated. However, ensure the team member meets the minimum for each role represented e.g. if a member is both a data specialist and business analyst, the member should have minimum 5 years of data specialist and minimum 5 years business analyst. If a job combined these roles, clearly demonstrate.

4.4. Functional evaluation Part 2 – Qualitative criteria

The functional evaluation criteria indicated below will be applied during Part 2 of functional evaluation to all bids that met the minimum requirements stipulated under Functional evaluation Part 1. During part 2 the Bid Evaluation Committee may:

- Evaluate and score bids based on the bid documents and proposals submitted; or
- Provisionally evaluate and score bidders based on proposals submitted and then invite bidders that met all requirements under Part 1 and a provisional overall score of at least 60% for both functional evaluation parts 1 and 2, to present their bids.

The final evaluation and scoring of bids will be based on the proposals submitted, as well as on information provided by bidders during mandatory bid presentations. Presentations can be used to summarise and clarify bids and may not substantially depart from the proposals submitted. Please note that presentations are done at the bidder's own costs.

If a bidder is unable to attend a bid presentation on the date requested by the Bid Evaluation Committee, then the bidder is disqualified.

Part 2: Minimum functional requirements: Only bids that obtained the <u>minimum score for each criterion</u> as well as an <u>overall score of at least 75%</u> for both functional evaluation parts 1 and 2, will proceed to Price/PPPFA evaluation.

Functional Evaluation Criteria		Weight	Min. Score
2.1	**Company experience specific to project scope, experience and knowledge of developing and implementing applications (par 2.4.1 of ToR)** 1= The bidder does not meet the minimum requirements 2= The bidder meets partial of the minimum requirements 3= The bidder meets the minimum requirements 4= The bidder exceeds the minimum requirements	3	*9*

Functional Evaluation Criteria		Weight	*Min. Score*
2.2	**Proposed approach as per Annexure A Section 4** 1= Proposed methodology is not aligned to the purpose, objectives and scope of the project. 2= Proposed methodology is partially aligned to the purpose, objectives and scope. 3= Proposed methodology and approach proposed is fully aligned to the purpose, objectives and scope. 4= In addition to 3, the methodology and approach is innovative, cognisant of the public sector environment and will add value beyond the originally intended purpose and objectives of the project.	3	*9*
2.3	**Project Management plan as per (par 2.5.1 of ToR) and Annexure A section 3:** 1= Project management plan not aligning to the scope and objectives 2= Project management plan partially aligning to the scope and objectives 3= Project management plan aligned to the scope and objectives 4= In addition to 3, demonstration of understanding the DPME and /or government environment.	3	*9*

4.5. Price / BBBEE / PPPFA

Only bids that meet the minimum administrative and functional requirements / specifications indicated in the ToR (qualifying bids) will be evaluated in terms of the Preferential Procurement Framework Act and related regulations – see attached bid documents. The evaluation method (80/20 or 90/10) and preference points allocation applicable to this bid are indicated in the attached SBD 6.1.

5. CONTRACT MANAGEMENT

The successful bidder will be required to enter into a service level agreement (SLA) with the Department of Planning, Monitoring and Evaluation. The National Treasury General Conditions of Contract (GCC) will form part of the SLA to be concluded between DPME and the successful bidder. A copy of the standard DPME SLA is available on the DPME tenders website. Bidders should familiarise themselves with the content of the standard template.

Bidders should note that:
- All information related to this bid, or information provided to the service provider subsequent to the award of this bid, must be treated as confidential and may not be disclosed in any way to third parties without the explicit written consent of DPME.
- **All information generated from this project is the property of the Department** and shall not be shared in any way with any third party.
- All right, title and ownership of any Intellectual Property developed by or for the Service Provider or DPME independently and outside of execution/production of the Deliverables related to this bid, and provided during the course of this project ("Background IP") shall remain the sole property of the party providing the Background IP.
- All Intellectual Property rights in Bespoke Deliverables are or will be vested in and owned by DPME including source codes, unless specifically agreed otherwise in writing. The Service Provider agrees that it shall not, under any circumstances, question or dispute the rights and ownership of DPME in and to the Bespoke Deliverables. DPME shall grant the Service Provider a non-exclusive, royalty free, non-transferable licence to use the Bespoke Deliverables for the purpose of performing its obligations under this project.
- The Service Provider may not publish or sell, in whole or in part, any Bespoke Deliverables emanating from this project without the explicit written consent of DPME.
- The Copyright of any Bespoke Deliverables shall vest in DPME.

6. **SPECIAL CONDITIONS APPLICABLE TO THIS BID**

   6.1. The names and CVs (including information on experience and specialisation in system development) of the individuals to be deployed on the project (please note the functional criteria related to resource capabilities). CV'S TO INCLUDE ALL RELEVANT EXPEREINCE AND QUALIFICATIONS.

   6.2. Replacement of team members may only be done in consultation with DPME and replacement team members must have at least the same qualifications / skills / experience as those they are replacing. The bidder will incur the costs to orientate the new resource on the project or work of DPME.

   6.3. The department reserves the right not to award the contract.

   6.4. The department reserves the right to invite service providers for presentations.

   6.5. The Intellectual Property and related materials including the source code of the solution remains the sole property of DPME.

   6.6. The National Treasury general conditions of the contract will apply.

   6.7. The successful bidder will be subject to sign the service level agreement.

   6.8. The successful bidder must be subjected to security screening and resources are required to sign DPME oath of secrecy.