

## TERMS OF REFERENCE

### **HSRC eRESEARCH KNOWLEDGE CENTRE (eRKC) – APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE ACCESS TO CONTENT MANAGEMENT AND INFORMATION SHARING SYSTEM**

#### **DIRECTORATE: eRESEARCH KNOWLEDGE CENTRE: INFORMATION SERVICES UNIT**

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## 1. BACKGROUND TO THE HSRC

The Human Sciences Research Council (HSRC) is a research organisation that advances social sciences and humanities for public use. The HSRC subscribes to the values of good governance, accountable public administration and sound management of the resources as reflected in the Public Financial Management Act of 1999 (PFMA as amended by Act 29 of 1999) and other laws and regulations applicable to public administration.

Established in 1968 as South Africa's statutory research agency the HSRC has grown to become the largest dedicated research institute in the social sciences and humanities on the African continent, doing cutting-edge public research in areas that are crucial to development.

Our mandate is to inform the effective formulation and monitoring of government policy; to evaluate policy implementation; to stimulate public debate through the effective dissemination of research-based data and fact-based research results; to foster research collaboration; and to help build research capacity and infrastructure for the human sciences.

## 2. eRESEARCH KNOWLEDGE CENTRE WITHIN HSRC

The eResearch Knowledge Centre (eRKC) within the HSRC employs a group of practitioners and specialists in the areas of information services, geospatial analytics, and digital curation who provide knowledge services to enhance the HSRC's research capability.

The vision of the eRKC is to enhance the HSRC's research capability through innovative information services, geospatial solutions, and digital curation. The mission of the eRKC is to be an informed research enabler that provides innovative knowledge services and access to resources that meet the needs of the HSRC's research community and its stakeholders. This is achieved by

- managing various resource collections and support the use thereof,
- supporting digital scholarship and providing support for organisation wide processes and requirements,
- supporting geospatial analytics in the HSRC, and
- raising awareness about best practices and building capacity in the HSRC.

## 3. APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE ACCESS TO A CONTENT MANAGEMENT AND INFORMATION SHARING SYSTEM

A content management and information sharing system is a ready-made platform that allows for the curation of resources, sharing of knowledge, publish and manage large amount of content on a secured cloud-based intranet. The need has arisen within the eRKC to acquire such a Content Management and Information Sharing System for the development of the eResearch Knowledge Hub. The aim is to share information and documents related to the role of the eRKC to make HSRC colleagues aware of what we do and the services that we provide. In addition, it will be use to raise awareness of best practices and provide access to resources linked to the various stages in the research process.

## 4. DELIVERABLES OF CONTENT MANAGEMENT AND INFORMATION SHARING SYSTEM

The Content Management and Information Sharing System should fulfil the following:

- 4.1** This system should be accompanied with specialised features that are designed and suitable specifically for the library and research environment
- 4.2 Guides:** It should enable the creation of course, subject or topic guides. The guides should be in the form of webpages that can be used to add and share content. Each guide can be organized into pages whereby each page will contain boxes of content items (such as text, links, images, databases, etc.). Patrons should be able to find published guides listed on the homepage.

**4.3 Customization and organizing options:** The system should offer powerful features for customizing, managing, and organizing content. It should also enable users to organize related guides. The system should have its own homepage, look & feel options, and friendly URL. The administration portion of the systems should include both point-and-click interface, and have the ability to apply HTML, CSS, and/or JS customizations to the system as desired by authorized end-users. The system URL should allow to be updated to a local DNS if desired.

The customisable features should include the following:

- Customisable layout per page ( columns, blocks, header image / text with crumbs, footer)
- Add different contact details per page
- Customisable defined fonts, colours, bullets, styles, etc.
- Customisable background of pages, content blocks, etc.
- Customisable menu navigation (left and top)

**4.4 Access control and restrictions:** The system should allow the restriction of access to a group, as well as permitting to create private or internal groups of guides. Not only should an administrator control who can view guides, but also edit them as well. Users roles should be defined. There should be a functionality for authorized reviewers to published content created.

**4.5 A-Z eResource database list:** The system should provide a built-in feature that will manage, import, export and update a Database A-Z list with the basic entry fields available (Title, Description, URL, Keywords, Subject areas, Service provider, Database type and EZProxy details). It should also offer the capability to distinguish between popular databases and trial databases. The searching on the public platform should allow browsing per database name but also permits to search according to a specific keyword, subject area or publisher/aggregator.

**4.6 Central advertisement point:** A Central place to advertise unit services, data, previous project outcomes should be available.

**4.7 Links:** The system should enable shareable links (URLs) from pages and allow for click through to related or additional pages on own and external sites. It should also permit clickable images / diagrams with multiple hotspots per image. Social media links should be permitted.

**4.8 Images:** The system should allow for images with clickable hotspots to be created within a block or page.

**4.9 Embedded materials:** The system should accommodate embedded photos and other images, such as book covers or other types, maps and video clips.

**4.10 Use of Widgets:** The system should allow custom widgets that will enable users to connect to a variety of information on and off the website. It should also be possible to link to widgets from other libraries and modify for re-use.

**4.11 RSS Feeds:** The system should offer the integration of RSS feeds. The system should accommodate the acceptance and delivery RSS feeds.

**4.12 Key interests:** The system should be enabled to allow for users to submit key interests. Once a list is received a notification can be send to users when content on this is published.

**4.13 Alert service:** The system should make users aware when content is published / updated.

**4.14 Re-use of templates/blocks:** Templates for information to be repeated across all pages. Users should be able to use existing template already created internally within eRKC or ask permission to use template from an external organization. Repeated use of similar content blocks on different pages should be allowed.

**4.15 Statistics:** The system should allow to generate statistics on the use of the content.

- 4.16 Searching capabilities:** Enable content search across guides/pages.
- 4.17 Built-in blogging tools public and internal discussion boards:** The system should make provision for functionality to develop and maintain library Websites and Blogs.
- 4.18 Integrate guides and E-Reserves content within your Library Management system:** It should showcase special collections, archives and exhibitions. It should also enable the integration between library resources to display and develop a list of newly acquired resources.
- 4.19 Wizard for the development of forms, surveys, quizzes and tutorials:** The System should offer an automated wizard for the implementations of forms, surveys, quizzes and tutorials.
- **Forms:** Develop and embed forms like Interlibrary loan forms, books acquisition requests etc.
  - **Surveys:** Enable users to gather vital user feedback from a satisfaction and feedback surveys.
  - **Quizzes:** Supplement instruction efforts.
  - **Tutorials:** Allows for the implementation of self-paced learning modules with the build in functions offered.'
- 4.20 Calendar tool:** It should offer the capability to book events with a reservation system, provide a customizable personal scheduler for one-on-one consultation sessions.
- **Event management:** Ability to manage the registration of conferences that includes customizable templates for registration and automated e-mail confirmation.
  - **Scheduling appointment:** Appointments can be booked via smartphones and computers dependant on availability.
  - **Hours:** The system should allow to manage opening and closing hours through the use of a re-usable template.
  - **Room bookings:** Build group of rooms and set-up restrictions though authentication layers.
  - **Statistic management** – Viewing of stats based on specific calendar, event and room statistics.
- 4.21 Frequently ask Question Module:**
- **Virtual Channels:** Communication channels like emails and SMS's and customizable "Ask Us" form into the system should be allowed to be routed.
  - **Unlimited FAQs:** Offer features for the creation of a strong knowledgebase of FAQs that are accessible even when you're closed. It should be possible for Groups to create private FAQs within a staff repository.
  - **Live Chat:** Multiple chat departments should be established to accommodate live chats that will only be visible for users assigned to specific department.
  - **Statistics:** Usage statistics on the activities related to incoming reference interactions and on public FAQ's.

## 5. GENERAL FEATURES

- 5.1 Functionality:** Provide functionality that supports typical library functions with the possibility to re-use components that have already been pre-built for these functions without the necessity to develop these from scratch.
- 5.2 Responsive design:** The system should allow to create content that adjusts smoothly to various screen sizes.
- 5.3 Capacity:** The restriction in total number of database /information /records in a database it can handle effectively should be adequate.
- 5.4 Adjustability:** The system should accommodate and handle different objects types, software formats and sizes.
- 5.5 Speed / Performance:** A quick-loading web page facilitates a positive and pleasant user experience is required.
- 5.6 Reliability:** The Content Management system should perform consistently without errors.

- 5.7 Expandability:** It must be possible to expand in terms of content, functionality to acceptable levels.
- 5.8 Copyright:** The system should allow to manage copyright and restrict access of content if applicable.
- 5.9 Workflow processes:** Should allow for a seamless workflow process since creation of a guide up until it gets published.
- 5.10 User friendliness:** The system should be intuitive and easy to learn and use. Since the system will be configured and content added by non-IT staff, it must be configurable to an acceptable level for non-IT staff to develop and modify.
- 5.11 Documentation:** Literature and documentation, manuals, training material must be available.

## 6. INFRASTRUCTURE

- 6.1 Software as a service (SaaS):** The system should support SaaS, a software distribution model that hosts applications with necessary services in the cloud and makes them accessible to end users over the internet. This includes services like security, backup etc.
- 6.2 Upgrades and maintenance of system:** It should be indicated how often the system will be upgraded and the implication for the customised content.

## 7. SUSTAINABILITY

- 7.1 Footprint:** The use of the system should have a footprint in an academic/research library environment, including in South Africa.
- 7.2 Support:** Support should be available if required.

## 8. EVALUATION CRITERIA

**Preference Point System (PPS): 80/20**

### Stage 1

FUNCTIONALITY	POINTS
<b>8.1. Background and Company profile</b>	
<b>8.1.1</b> The service provider needs to provide 5 recent years' proposal on the company profile related to service delivery of a Content Management and Information Sharing System to Research/Education Institution.	<b>25</b>
<b>8.2. Methodology</b>	<b>50</b>
<b>The Proposal provided will be measured against the requirements set in section 4-7. Proposal can be in a brochure, screenshot or marketing material format</b>	
<b>8.2.1</b> Deliverables of Content Management System (30)	
<b>8.2.2</b> General Features (10)	
<b>8.2.3</b> Infrastructure (5)	
<b>8.2.4</b> Sustainability (5)-	
<b>8.3 Experience</b>	
<b>8.3.1</b> Provide three (3) contactable reference letters from clients on their experiencing in using the Content Management System. This should be on an official letterhead (not older than two (2) years).	<b>25</b>
<b>TOTAL (Functionality)</b>	<b>100</b>

**Bidders who fail to obtain a minimum threshold score of 70% on functionality will not be considered for further evaluation.**

**9. CONTRACT DURATION:**

3 Year Period

**10. SERVICE LEVEL AGREEMENT**

- Upon award the HSRC and the successful bidder will conclude a Service Level Agreement regulating the specific terms and conditions applicable to the services being procured by the HSRC more or less in the format of the draft Service Level Indicators included in this tender pack.
- **For technical enquiries:** Frieda Billson – [fbillson@hsrc.ac.za](mailto:fbillson@hsrc.ac.za)