TERMS OF REFERENCE

FOR

FOR THE APPOINTMENT OF A SERVICE PROVIDER TO AUTOMATE BUSINESS PROCESSES FOR THE QCTO MIS (MANAGEMENT INFORMATION SYSTEM) FOR A PERIOD OF TWENTY- FOUR (24) MONTHS

Initials:

INVITATION TO BID

FOR THE APPOINTMENT OF A SERVICE PROVIDER TO AUTOMATE BUSINESS PROCESSES FOR THE QCTO MIS (MANAGEMENT INFORMATION SYSTEM) FOR A PERIOD OF TWENTY - FOUR (24) MONTHS

TENDER NO: QCTO 15-2025/26

Closing Date	Address for Submission
Date: 12 December 2025 Time: 11:00	Quality Council for Trade and Occupations Tender Box @ Reception 256 Glyn Street Hatfield Pretoria 0083

Late Submissions will not be considered

Bidder's Name	
Address	
Contact person	
Contact numbers	(w)　　　　　　　　　　(cell)
Email address	

BRIEFING INFORMATION
Compulsory Virtual Briefing session
Date: 28 November 2025
Time: 10:am

Briefing Session Link: https://teams.microsoft.co=m/l/meetup-join/19%3ameeting_ZGEwN2IzYjYtYTA3MS00MmM1LTk1MTktNWMzOTkxNTM4NDdi%40thread.v2/0?context=%7b%22Tid%22%3a%221aaf8259-7fdc-4376-8b09-18fa797adeed%22%2c%22Oid%22%3a%2240b134a1-0502-41a2-bf46-0099c292351f%22%7d

Meeting ID: 385 408 007 455 05
Passcode: iW6ef2VK

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1. INTRODUCTION

The QCTO is a Schedule 3A Public Entity that was established in accordance with the Skills Development Act, No. 97 of 1998 (as amended), and the National Qualifications Framework Act, No. 67 of 2008 (as amended), and came into operation on 1 April 2010.

The main functions of the QCTO, among others, are to develop standards for occupational qualifications, including trades and skills programmes; accredit skills development providers and assessment centres; conduct assessments; ensure quality assurance; and issue certificates to qualifying learners.

Therefore, the QCTO is responsible for standards generation and maintenance, as well as the quality assurance of occupational full and part qualifications registered on the National Qualifications Framework (NQF) and the Occupational Qualifications Sub-Framework (OQSF) policy, including skills programmes.
The QCTO has approximately 120 staff members and is situated in Hatfield, Pretoria. More information can be obtained from https://www.qcto.org.za

The QCTO is currently re-engineering and documenting its business processes and now requires the automation of selected processes using software in a scalable and secure manner.

Prospective Service Providers who are interested in providing Business Process re-engineering, analysis, re-design, mapping and documentation for the Quality Council for Trades and Occupations (QCTO) core business operations as specified herein, and in accordance with the General Conditions of offer, as well as the specifications are requested to complete this tender document, together with all the standard bidding documents in full.

2. BACKGROUND

The Quality Council for Trades and Occupations (QCTO) is a Quality Council established in 2010 in terms of the Skills Development Act, No. 97 of 1998 (as amended) and the National Qualifications Framework Act, No. 67 of 2008 (as amended). Its role is to oversee the design, implementation, assessment and certification of occupational qualifications, including trades, on the Occupational Qualifications Sub-Framework (OQSF). The QCTO also offers guidance to skills development providers who must be accredited by the QCTO to offer occupational qualifications.

In summary, the QCTO is responsible for:
Establishment and management of the Occupational Qualification Sub-Framework (OQSF):
- Occupational Qualifications and skills programmes development and maintenance.
- Accreditation of Skills Development Providers.
- Accreditation of Assessment Centres.
- Assessment.
- Certification.
- Research and Knowledge Development; and
- Stakeholder Management and Advocacy.

4   **Initials:**

The QCTO presently has a service provider contracted to streamline its core business processes using Lean Six Sigma. That project started in October 2024 and ends in September 2026, and the QCTO intends to develop QCTO's Management Information System (MIS), once the processes have been optimised and documented. The streamlining of QCTO Core Business processes using Lean Six Sigma is a Continuous Improvement project; therefore, any software changes required after the initial build shall come as change control during the 24-month duration of this contract.

The developed system will be used for the management and administration of the core business departments' operations of the organisation, namely:

- Occupational Qualifications and skills programmes development and maintenance;
- Accreditation of Skills Development Providers;
- Accreditation of Assessment Centres;
- Assessment;
- Certification;
- Research and Knowledge Development; and
- Stakeholder Management and Advocacy.

Data from this system should interface with QCTO's existing systems, such as the Certification Verification System (CVS), AIDB (Assessment Item Data Bank) for submission to the National Learner Records Database (NLRD) and other Regulatory Bodies, such as SAQA (South African Qualifications Authority).

The system should be capable of importing and exporting data from other QCTO systems concerning the learner, qualification and provider data.

The bidder shall be required to import data from an existing QCTO data warehouse.
The developed system should be capable of being used to extract reports which are in line with the formats required by SAQA.

3. PURPOSE

This proposal aims for QCTO to appoint a suitably qualified and experienced service provider to automate and develop the QCTO's Management Information System (MIS). The appointment of the successful bidder(s) will be for a period of twenty-four (24) months commencing on the date as prescribed in the Letter of Award and signed Service Level Agreement.

4. TENDER SUBMISSION AND COMPLIANCE

Prior to submission, the bidders must check that all pages are properly numbered, and all required documents are signed and initialled. QCTO will hold the duly authorised signatory liable on behalf of the bidder.
Bids received late shall not be considered. The tender (bid) box shall be closed at exactly **11:00 am** of the closing date and bids arriving late will not be considered under any circumstances. Bids received late shall be returned unopened to the bidder. Bidders are therefore strongly advised to ensure that bids be despatched at such a time that will accommodate of any unforeseen events that may delay the delivery of the bid.

NB: Please create an index page for ease of reference. Paginate your bid submission by using numbered file dividers or a similar system. Each page should be initialled with black ink.

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256 Glyn Street, Hatfield, Pretoria, 0083
Private Bag X278, Pretoria, 0001
+27 12 003 1800

BID FORMAT

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

- **Annexure B:** Summary of experience (Must use attached template).
- **Annexure B1:** Pricing information. Price Bids must include VAT and should be fully inclusive to deliver all outputs indicated in the terms of reference (Must use attached Excel template)**.**
- The published terms of reference (this document, including Annexure A to this document).

Bidders must adhere to the below list for submission:

Table 4 (a)

I/We have attached to this document:	Tick if submitted		Office use
• Four hard copies of the technical bid document including the duly completed terms of references document (Initialled by authorised signatories	Yes	No	
• **Annexure B**: Summary of experience (Must use attached template).	Yes	No	
• Submission of one pricing completed **SBD 3.3**, together with **Annexure B1** (Must use attached Excel template). (Separately sealed in an envelope labelled **PRICING**).	Yes	No	
• One (1) **USB** Submission of the technical bid document including the duly completed terms of references document (initialled by authorised signatories)	Yes	No	
• Duly Completed Standard Bidding Documents **(SBD 1 SBD 4, SBD 6,1)**	Yes	No	
• Proof of CSD Registration (National Treasury) MAAA number on the **SBD1** (invitation to bid) and attach CSD report. If there will be subcontracting, proof of CSD registration of the sub-contractor must be submitted	Yes	No	
• Tax Compliance Requirements	Yes	No	

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4.1. Pricing

4.1.1. The bidder must submit details regarding the Bid price for the services on the pricing schedule provided in SBD 3.3, and Annexure B 1. The completed form/s must be submitted together with the **Annexure B1** in 1 envelope.

4.1.2. Bidders are required to indicate their rates (costs) inclusive of all applicable taxes.

4.1.3. The attached spreadsheet **(B1)** must be used to cost the Bid.

4.1.4. The price Bid must include VAT (if applicable) and should be fully inclusive to deliver all outputs indicated in the terms of reference.

4.1.5. Bidders must ensure that the Total Bid Price (Including VAT) must be the same on pricing schedule (SBD1) and on the Annexure B1: Costing/Price Schedule. Failure to comply with this requirement will lead to disqualification.

4.1.6. Bidders must ensure that the Total Bid Price (Including VAT) must be the same on SBD 3.3 and on the Annexure B1: Costing/Price Schedule. Failure to comply with this requirement will lead to disqualification.

4.1.7. Bidders must ensure that they indicate the Bid Prices (Including VAT) for each year on the Annexure B1: Costing/Price Schedule

4.1.8. All other cost increases will be negotiated, not exceeding the actual inflation rate (CPI).

4.1.9. QCTO will not provide upfront payments.

NB: Failure to provide the pricing bid and errors on calculations will invalidate the bid and result in immediate disqualification of the bid

4.2. PARTNERSHIPS AND LEGAL ENTITIES

In the case of the bidder being in a partnership, close corporation or a company, a certificate reflecting the names, identity numbers and addresses of the partners, members or directors (as the case may be) must be submitted with the Bid.

4.3. CONSORTIUMS AND JOINT VENTURES

4.3.1. If the bidding unit emanates from a joint venture or collaborative partnership or consortium (including a newly formed company), the individual entities that make up the bidding unit should each provide all the mandatory requirements.

4.3.2. Should all the requirements in respect of the bidding unit or the individual entities not be met, the bidding unit will be disqualified.

4.3.3. It is recognised that bidders may wish to form consortia to provide the services.

4.3.4. In response to this invitation to bid, a consortium shall comply with the following requirements:

- A copy of the agreement entered by the consortium members shall be submitted with the Bid. It shall be signed to be legally binding on all consortium members.
- The Bid document shall be signed to be legally binding on all consortium members.
- One of the members shall be nominated by the others as authorized to the lead member and this authorisation shall be included in the agreement entered between the consortium members.
- The lead member shall be the only authorised party to make legal statements, communicate with QCTO and receive instructions for and on behalf of any or all the members of the consortium.

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5. SCOPE AND DEFINITION OF WORK

The scope of work will include the automation and development of the QCTO's Management Information Systems from the output of current streamlined and re-engineering business processes optimised for automation.

In responding to this bid, the service provider(s) must provide a detailed methodology and approach, including the implementation plan on how the service provider will deliver the services as detailed below.

The proposal must be specific to the QCTO, and it is imperative that when a provider has a recommendation not included in the scope of work, the provider must scope their proposal and provide indicative costs of such a service.

5.1. The scope of work includes but is not limited to Automation and Development of the QCTO MIS:

The MIS shall be a web-based and process-driven system with the following capabilities:

- System management and administration
- Business rules management and
- User and group collaboration

The requirements are categorised into four sections, namely:
- Functional requirements,
- Non-functional requirements,
- Standard requirements and
- Informational requirements.

5.2. Development of the QCTO Management Information Systems (MIS)
- Convert use cases and application design into functional applications
- Identify hindrances and bugs and formulate solutions to these problems
- Maintain code quality
- Document all the deployed code.
- Ensure the best possible performance, quality, and responsiveness of applications.
- Gather technical requirements through lightweight requirement documents and conversations with Core Business staff and other relevant stakeholders.
- Testing of systems
- Develop and maintain the user manual
- Provide training to end users
- Monthly progress reporting on activities assigned
- Design, build, and maintain secure, efficient, reusable, and reliable code

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5.3. AUTOMATION AND DEVELOPMENT OF THE QCTO'S MANAGEMENT INFORMATION SYSTEM (MIS) EXPECTED OUTCOMES AND DELIVERABLES

System Access Requirements
The access levels will be as follows:

5.3.1. The System Administration Level: This highest level of access shall be granted to the QCTO System Administrator. They will have access to all data and can download any information in the database. They will also have access to all user profiles and usage data.

5.3.2. The Process Point Level: This level will be role-based, segregated and granted according to the individual designated role and responsibilities. The user ID determines user access control levels and privileges. Only information for which a user has responsibility will be available for that user to access. The user will also have access to all data relating to the user profiles and usage data for the users affiliated with the process for which they are responsible, e.g., Accreditation etc.

5.3.3. General Access Level: This level provides user access to view any general information in the database via the query program. The System Administrator will control downloads of the database information. Different reports should be available to various departments for their reporting purposes, such as information on Learner enrolments etc.

5.4. DATABASE DESIGN REQUIREMENTS

5.4.1. The database design structure priority will be to maximise business processing and application access speed.

5.4.2. The database/system design shall be such that Web-based access inquiries or downloads are responsive to Web users with no degradation of the responsiveness to process application accesses.

5.4.3. The database will be segmented to accommodate data that is common across different business processes (segregated per department)

5.4.4. The initial database will provide all the data identified in the Data Requirements Section that will only follow the definition of the QCTO data dictionary.

5.4.5. The database will be designed to easily accommodate expansion for new data elements as future requirements dictate.

5.5. Database Update Requirements

5.5.1. Complete online editing shall be provided, making maximum use of drop-down menus. Individual data element edit criteria shall be defined.

5.5.2. Data entries will be validated following the defined criteria, on-screen identification of invalid data will be presented, and the master database will not be updated until all the data passes validation.

5.5.3. There shall be a Web update page(s) for all the QCTO-wide data elements; this shall be the first page(s) to come up after logging onto the Web update. This page(s) shall be the same for all users having update capability, which is determined by the system access requirements.

5.5.4. There shall be separate Web update pages for the process unique data; the user ID shall determine the appropriate page at time of login.

5.5.5. The authoritative input source shall be able to specify, via drop-down, an effective date for submitted changes. This capability shall allow the submitter to select a single future effective date for all changes made during the update session or to specify that the changes made to the data entries for a single stakeholder take effect on a future specified effective date. This will be accomplished via a drop-down menu choosing immediate updates or by selecting a date from a drop-down calendar. When no effective date is specified, the system will affect the update changes immediately.

At the time of deployment if it is found that the above-mentioned specifications are no longer best practice, the service provider should apply current knowledge.

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5.6. TECHNICAL REQUIREMENTS

5.6.1. QCTO requires interface/integration of the new system with the existing systems such as AIDB, CVS etc.

5.6.2. The project team should consist of at least three qualified resources (developers) at the development stage, a business/system analyst for the duration of the development and one resource (developer) for the duration of the contract for maintenance and enhancements. (8 days a month for the first six (06) months after the system go-live date, and then three (03) days a month for the remainder of the contract)

5.6.3. The QCTO requires that the system development should be completed within a maximum of 12 months, however any work that can be done in less time should be completed in shorter time. System testing and sign-off are not to exceed one (01) month after the completion of development.

5.6.4. If the development is done less than 12 months, the remainder of the contract up to the twenty-four (24) months mark shall be used for enhancement at the agreed hourly rates.

5.6.5. The service provider must be able to develop the system within agreed timelines.

5.6.6. Bidders are required to submit a detailed implementation plan with their proposals for the development of a system with a focus on the above-mentioned QCTO departments and in line with the QCTO's mandate.

No	Description
1	All changes or new developments to the systems are done. These changes may imply changes in the functionality of the system or new functions to be added Development of an entirely new system for issuing QCTO Occupational certificates, legacy occupational certificates, and verification of the certificates.
2	Troubleshooting – assistance with all systems faults and queries
3	System version and procedure management
4	System enhancement and improvement
5	Provide System support
6	Maintain code quality
7	Ensure the best possible performance, quality and responsiveness of applications.
8	Gather technical requirements through documentation and user sessions.
9	Monthly progress reporting on activities
10	Maintain efficient, reusable, and reliable code using secure coding practices throughout.
11	End user support
12	System user manual developed and kept up to date
13	System and data used should be backed up and easily recoverable and restorable

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5.7. NON-FUNCTIONAL REQUIREMENTS

No	Description	System
NF 01	Performance Requirements	
	01.1 Response and Turnaround times	The system should have acceptable response times when user is accessing the system.
	01.2 Scalability	The proposed system should be able to automatically and efficiently handle an increased volume of transactions.
	01.3 Reliability	24/7- and 365-day System availability at 99,9% availability with appropriate failover - mechanism in place in the background
NF 02	Legislative Compliance and Conformance	
	02.1 Legislation conformance	The system must be POPI and POPIA compliant. Compliant with ICT (Information Communication Technology) Frameworks
	02.2 Technology	The system should be able to interface with QCTO's existing systems: CVS SAGE 300/ Intacct Compliant with different web browsers AIDB etc.
	02.3 Maintainability	Changes, code, and configuration should be documented. Technical and organisational standards compliance The system must have the ability to integrate with Microsoft platforms and interfaces.
	02.4 Ergonomics	The system should be user friendly and conform to the best user Experience/Interface design.
	02.5 Operational Environment	The system should be resilient and optimised to be cloud-based.
NF 03	Control Requirements	
	03.1 Security	The system will be user-access controlled and integrated with Active Directory. Users must be created and granted access based on their access control. Changes made on the system should be saved on the back end (SQL db.) directly.

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	03.2 Auditability	The system should be auditable with proper audit trails on all user actions Usage stats should be readily available on the system
	03. 3 Integrity	Ability to produce defined reports for management per different departments No batch processing should proceed before clearing the validation exception
	03.4 Backup Strategy	The database should have rollback/Roll forward capabilities. Daily automatic backup should be possible.
	03.5 Recovery	The system should be easily and quickly recoverable.

STANDARD REQUIREMENTS

No.	Requirement	Source	Measure
S0	**Coding Security** Adherence to code security best practices.	Secure coding practises to be employed throughout design and testing	Confidentiality, integrity, and availability maintained
S1	**Systems Accessibility** The system must be accessible to relevant users in different units and restricted based on the access allowed by unit and by role.	Accessibility to all users that have access	99.9% System *uptime* *99.9% Server Up-time*
S2	**Security: Prevent unauthorised access.** Access only to authorised personnel/users. Role based and controlled functions	Adequate security on the application and compliant protection from cyber security threats	99.9% effective
S3	**System Availability:** The system must be available 24/7 per week and 365 days of the year. Planned downtime should not be during standard operating hours. Downtime should be as minimal as possible.	Available 24/7and 365 days of the year.	99.9% availability
S4	**Efficiency: The system's resource usage must be efficient.** The system must be designed to efficiently use cloud computing	The system must be designed with resource efficiency in mind.	**N/A**

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No.	Requirement	Source	Measure
	resources to ensure a reasonable cost of operation.		
S5	**System Performance: System performance must be impeccable and agile**	The system response time must be fast, and any system lag should be easily resolvable	Response time 10-40 seconds. All other standard processes take 2-5 seconds.
S6	**Reliability: The system must be highly reliable**	The system must be able to perform and maintain its functionality under routine and hostile circumstances	99.9% operational and uptime
S7	**Resilience: The System must be easily recoverable from any catastrophic fault**	In the event of system failure, the system should be recoverable with minimal effort.	System recovery within a reasonable amount of time
S8	**Information Accuracy: All information processed by the system should have integrity and accuracy**	All calculations and processes undertaken by the system should be accurate and have proper validations in place to ensure accuracy	100% accuracy
S9	**Compatibility: The system must use open industry standards**	The system must be compatible across all platforms	The system must be 99% compatible with other internal systems

6. PROJECT TIMELINES

The service provider must ensure that the project is completed within twenty-four (24) months after SLA (Service Level Agreement) is signed. Although the total duration shall be twenty-four (24) months, the QCTO shall review the bidder's performance at the end of every six (06) months and reserves the right to terminate the contract due to non-performance.

7. DELIVERABLES AND TIME FRAMES

The service provider shall adhere to the schedule that outlines the project's timeline below:

DELIVERABLES	TIMEFRAME
Inception Meeting Signing of the SLA Approved project plan	**2026**
System Development	06 months
Final System testing and sign-off	1 months
Enhancement	17 months

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8. COMPANY REQUIREMENTS

8.1. The following must be submitted:
8.1.1. Certified copies of Identity Documents (IDs) and or valid passport for non-South African citizen of company directors
8.1.2. Proof of company/closed corporation registration and a copy of CM/CK certificates
8.1.3. CSD Registration (National Treasury)
8.1.4. A detailed methodology and approach, including the implementation/project plan on how the service provider will deliver the services.

9. EXPERIENCE / SKILLS / PAST PERFORMANCE / TEAM REQUIRED

Bidders will demonstrate adequate experience through the number, types, scope and geographical spread of projects/assignments undertaken. The attached spreadsheet **Annexure B** must be used to summarise qualifications, skills and experience. The past performance of bidders in executing similar projects will be evaluated using the references supplied by bidders as well as any other information available to the BEC panel.

9.1. Company Experience

The service provider (bidding company) must have a minimum of five (05) years of operational experience in system development projects.

To support this, service providers are required to submit CVs of proposed team members, contactable references for 3/5 or more recent projects.

Reference letter/s (on the letterhead of the company and signed) as proof that they have successfully rendered the services, or that they have been providing similar services for at least five (05) years. The reference letter/s should include contactable details for verification purposes. The attached template **(Annexure B)** must be used to summarise the experience.

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9.2. Team Qualifications and Experience Required

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 QCTO and replacement of such must have the same qualifications / experience as those they are replacing. For each role specified on table 9.2 (from role no 01 - 08), the bidder must provide at least one 1 CV. CVs must be on the provided compulsory CV template.

The following table illustrates the minimum qualification and experience required for.

Table 9.2(a)

NO	Roles*	Qualifications	Experience
1	Software Architect	Relevant Bachelors' degree and valid professional certifications **OR** A portfolio of work done in the respective field with contactable references.	Five or more years of experience in software architecture
2	Lead software developer	Relevant Bachelors' degree and valid professional certifications **OR** A portfolio of work done in the respective field with contactable references	More than 9 years of experience in system development
3	Three (03) intermediate software developers	Relevant Bachelors' degree and valid professional certifications **OR** A portfolio of work done in the respective field with contactable references.	More than 6 years of experience in system development
4	Data Modeller	Relevant Bachelors' degree and valid professional certification such as TOGAF 9/10 Certified (NOT FOUNDATION), or DAMA CDMP (Data Management Association Certified Data Management Professional) General or Data Modelling specialisation.	More than five (05) years' experience in data modelling.
5	Senior Business Analyst	Relevant Bachelors' degree and valid professional certification such as those from the International Institute of Business Analysis.	More than 6 years of experience in a business analyst role
6	UX/UI (User experience/interface) designer	Relevant Bachelors' degree and valid professional certifications **OR** A portfolio of work done in the respective field with contactable references.	More than 5 years of experience in UX or UI design
7	Two (02) Software testers	Relevant Bachelors' degree and valid professional certifications such as International Software Testing Qualifications Board (ISTQB).	More than 5 years of experience in software testing
8	Project Manager	Relevant Bachelors' degree and valid professional certifications such as: • PRINCE 2, • AgilePM or PMP.	More than 9 years of experience in ICT project management
9	Change Manager	Relevant Bachelors' degree and valid professional certifications in change management such as: • Certified Change Management Professional (CCMP) • APMG Change Management Qualifications • Prosci Certified Change Practitioner.	More than 9 years of experience in ICT Change management

Please note that one individual can fulfil up to two roles; for example, the Lead software developer can also be the Software Architect concurrently, however an individual must hold the role-specific experience and qualifications for both roles.

9.2.1. Confirmation of experience, qualification and availability
The following must be submitted for each of the proposed team members/ roles:
- Detailed CV indicating qualifications, experience as well as contactable references. (attached template must be used for CVs)
- Attach certified copies of all qualifications.

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

10. EVALUATION

QCTO may request additional information, clarification, or verification regarding any information contained in a bid. Information will be requested in writing, and the bidder must provide the requested information within forty-eight (48) hours after the request has been made; otherwise, the bidder will be disqualified.

QCTO may conduct due diligence on any bidder, which may include interviewing customer references or other activities to verify a bidder's other information and capabilities (Including visiting the bidder's previous premises and/or sites to verify certain stated information or assumptions). In these instances, the bidders will be obliged to provide QCTO with all necessary access, assistance, and/or information that QCTO may reasonably request and to respond within the given time frame set by QCTO.

The 80/20 principle will be applied in terms of the Preferential Procurement Policy Framework Act.

10.1. STAGE 1: MANDATORY REQUIREMENTS
During this stage, the bid will be reviewed to determine compliance with all mandatory requirements and such documents must be signed by a duly authorised representative. Failure to meet or submit any or all the above mandatory requirements will lead to the bidder being disqualified.

Table 10.1(a):

I/We have attached to this document:	Tick if submitted		Office use
• Letter of Good Standing (COIDA) issued by the Department of Labour	Yes	No	
• Certified copies of the identity documents of those with equity/shares	Yes	No	
• CSD Registration (National Treasury)	Yes	No	
• Proof of company/closed corporation registration and a copy of CM/CK certificates	Yes	No	

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10.2. PHASE 1: FUNCTIONALITY

Only bidders that qualified during the Mandatory Evaluation will be evaluated on functionality. At this stage, the evaluation process will be based on the bidder's responses in respect of their Bids against Terms of Reference and quality.

Table 10.2(a): Qualifying Bid will be evaluated on the following:

No	Evaluation Criteria	Guideline	Scoring	Points
1	Experience in similar system development projects	Dated and signed (on client company's letterhead) Completion/reference letters with recommendations demonstrating experience in system development projects (not less than six (06) months), in public or private sectors in the last five (05) years. Signed and dated reports (on the bidder's letterhead) for each reference letter stating the client's business problem(s) and the software solutions provided. Number of similar projects completed ***Similar means any software that has clients both internal and external to the client's organisation, and information/data/document exchange.** Reference letters must contain the following: • Signed and on an entity letterhead. • Clearly indicate the type of service provided. • Recommendation or comment on service rendered • Contract duration. • Relevant contact person's name, Surname, position and contact number/s QCTO reserves the right to contact these organisations, without prior notice to the bidder	• 0 projects = 0 • 1 project = 5 • 2 projects = 10 • 3 projects = 20 • 4 projects = 30 • 5 or more projects = 40	40
2	**Qualifications and Experience:** X1 Software Architect	CV with a relevant Bachelors' degree and valid professional certifications OR A portfolio of work done in the respective field with contactable references.	• 05 or more years of experience in software architecture = **10** • 02 - 04 years experience in software architecture = **05** • Less than 02 years' experience in software architecture = **0**	10
3	**Qualifications and Experience:** X 1 Lead software developer	CV with a relevant Bachelors' degree and valid professional certifications OR A portfolio of work done in the respective field with contactable references.	• More than 9 years of experience in system development = **05** • 5-9 years' experience in system development = **03**	05

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No	Evaluation Criteria	Guideline	Scoring	Points
			• Less than five years' experience in system development = **0**	
4	**Qualifications and Experience:** X 3 intermediate developers	CV with a relevant Bachelors' degree and valid professional certifications OR A portfolio of work done in the respective field with contactable references.	• All CVs submitted have more than 6 years of experience in system development = **05** • All CVs submitted have 3-5 years' experience in system development = **03** • All CVs submitted have less than 3 years' experience in system development = **0**	05
5	**Qualifications and Experience:** **X1 Data Modeller**	CV with a Bachelors' degree and valid professional certifications in TOGAF9/10 Certified (NOT Foundation) or DAMA CDMP General or Data Modelling specialisation.	• More than 5 years of experience in a data modelling role= **05** • 3-5 years' experience in a data modelling role = **03** • Less than 3 years' experience in a data modelling role = **0**	
6	**Qualifications and Experience:** X1 Senior Business Analyst	CV with a relevant Bachelors' degree and valid professional certification such as those from the International Institute of Business Analysis.	• More than 6 years of experience in a business analyst role= **05** • 3-5 years' experience in a business analyst role = **03** • Less than 3 years' experience in a business analyst role = **0**	05
7	**Qualifications and Experience:** X1 UX/UI (User experience/interface) designer.	CV with a relevant Bachelors' degree and valid professional certifications OR A portfolio of work done in the respective field with contactable references.	• More than 5 years of experience in UX or UI design = **05** • 2-4 years' experience in UX or UI design = **03** • Less than 2 experience in UX or UI design = **0**	05
8	**Qualifications and Experience**: X 2 Software testers	CV with a relevant Bachelors' degree and valid professional certifications such as International Software Testing Qualifications Board (ISTQB).	• All CVs submitted have More than 5 years of experience in software testing = **05** • All CVs submitted have 2-4 years' experience in software testing = **03**	05

Initials:

No	Evaluation Criteria	Guideline	Scoring	Points
			• All CVs submitted have Less than 2 years' experience in software testing = **0**	
9	**Qualifications and Experience:** X1 Project Manager.	CV with a relevant Bachelors' degree and valid professional certifications such as PRINCE 2, Agile PM or PMP.	• More than 9 years of experience in ICT project management = **05** • 5-9 years' experience in ICT project management = **03** • Less than five years' experience in ICT project management = **0**	
10	**Qualifications and Experience:** X1 Change Manager	CV with a relevant Bachelors' degree and valid professional certifications in change management such as Certified Change Management Professional (CCMP) APMG Change Management Qualifications Prosci Certified Change Practitioner.	• More than 9 years' experience in ICT Change management = **05** • 5-9 years' experience in ICT Change management = **03** • Less than five years' experience Change management = **0**	05
11	Project Methodology	A detailed methodology and approach, including the implementation/project plan on how the service provider will deliver the services. Project plan must not be more than five pages.	• Detailed Project plan demonstrating understanding of the scope of work, expected milestones and good risk management = **15** • Detailed Project plan demonstrating understanding of the scope of work and expected milestones = **10** • Detailed Project plan but does not demonstrate understanding of the scope of work = **5**	15
	Total			**100**

Each criterion shall be assessed and scored on the evaluation sheet using the above points.

Threshold: Bidders who score less than **80** out of **100** points will not be considered for phase 2 of evaluation (Presentation / Demonstration) and will be disqualified for this project.

Initials:

10.3. PHASE 2: Functionality Evaluation (Presentation / Demonstration) – Qualitative criteria

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

- **Invite bidders that met all requirements under Phase 1 and a provisional overall score of at least 80% for functional evaluation phase 1, to present their bids.**
- **Evaluate and score bids based on the bid documents and proposals submitted.**

Presentations can be used to summarise and clarify bids and may not substantially depart from the proposals submitted. The second phase of the functional evaluation stage is based on the proposals submitted as well as on information provided by bidders during presentation/demonstration, which will be evaluated using the following criteria and points:

Table 10.3(a):

No	Evaluation Criteria	Guideline	Scoring	Points
1	**Understanding the brief:** The proposal and / or presentation by the service provider:	Explanation as to why the firm should be selected as the preferred Service Provider, understanding of the sector and, the purpose and objectives of the project responded innovatively including any value-added services	• Proposal shows exceptional understanding of the sector and offered value-added service **= 30** • Proposal shows minimal understanding of the sector and offered value-added service. **= 20** • Did not address the purpose and objectives of the service **= 10**	30
2	Methodology and approach	Bidder's understanding of the requirements and its capacity to deliver, indicating completion of the project within the required time frames	• Project plan addresses all deliverables and indicates completion of the project in significantly less that the envisaged time frames **= 50** • Project plan addresses all deliverables and indicates completion of the project within the required time frames **= 30** • Project plan does not fully address all deliverables or does not indicate completion within the required time frames **= 10**	50
3	The extent to which the product addresses the requirements of the QCTO	Extent to which the costing methodology is realistic given the scope and time frames of the project	• The costing methodology provides innovative solutions to reduce costs associated with the project **= 20** • The costing methodology is realistic given the scope and time frames of the project**= 15** • Costing of the project is not aligned to the scope and times frames of the project **= 10** • Costing of the project not entirely aligned to scope and time frames and may negatively impact delivery **= 05**	20
	TOTAL			**100**

NB: *Presentations/demonstrations will be done in person at the QCTO Offices. QCTO will not reimburse potential service providers for travel costs or related costs. PHASE 2:*

Threshold: Bidders who score less than **80** out of **100** points will not be considered for Price and Specific Goals and will be disqualified for this project

20   **Initials:**

10.4. STAGE 2: PRICE AND SPECIFIC GOALS

Only bids that achieved the minimum qualifying score/percentage for functionality will be considered further in terms of the 80/20 preference point system.
The formulae to be utilised in calculating points scored for the preference point system will be included in the tender document.

Step 1 will be the calculation of points for price where the lowest bid will score 80 points for price, while bids with higher prices will score lower points for price on a pro-rata basis. The following formula will be utilised to calculate the points for price in respect of Bid with a Rand value below R50 000 000 (all applicable taxes included):

$$Ps = 80\left(1 - \frac{Pt - Pmin}{Pmin}\right)$$

Where:
Ps = Points scored for comparative price of Bid or offer under consideration.
Pt = Comparative price of Bid or offer under consideration; and
Pmin = Comparative price of lowest acceptable Bid or offer.

Step 2 will be the calculation of points for the Specific goals contribution where **20** points will be awarded to a Bidder as per the table below:

Specific goals	Definitions	Number of Points
Women ownership with at least 50%. **>50% = 5 points** **<50% = 0 point**	5 points can be claimed by bidders who have owners/directors who are Black women with at least 50% of ownership	**5**
Youth ownership with at least 50%. **>50% = 5 points** **<50% = 0 point**	5 points can be claimed by bidders who have owners/directors who are Black persons from the age of 16 to 35 with at least 50% of ownership	**5**
Black ownership with at least 50% **>50% = 10 points** **<50% = 0 point**	10 points can be claimed by bidders who have owners/directors who are Black with at least 50% of ownership	**10**

Note: Failure to provide certification or affidavit substantiating the attainment of any of the Specific goals criteria will result in the Bidder being awarded zero (0) points for the Specific goal.

In the case that B-BBEE certificates are used to substantiate the points, the bidder must submit the full verification report, which shows the percentage of black ownership, Women, Youth and address for locality (see SBD 6.1 page 4 for verification documents).

Initials:

11. CALCULATING THE FINAL SCORE

The points scored for the price (step 1) will be added to the points scored for the Specific goals (step 2) to obtain the tenderer's total points scored out of 100.

AREAS OF EVALUATION	POINTS
Price	80
Specific Goals	20
Total	100

12. SPECIAL CONDITIONS APPLICABLE TO THIS BID

- QCTO will furnish the Service Provider with all relevant and available data and information, which is necessary to perform the services under the agreement.
- Once paid for, the QCTO shall own all rights to the software developed without any exclusions and the same shall not be reproduced or re-engineered for any other entity or person except after obtaining the written permission of the QCTO CEO.
- All the resources used in the project, as specified in Table 10.2(a) above must be geographically based in the Republic of South Africa.
- QCTO will become the owner of all information, documents, programmes, advice and reports generated and compiled by the Service Provider in the execution of the services.
- The copyright of all documents and reports complied by the Service Provider will vest in QCTO and may not be reproduced or distributed or made available in any other way without the written consent of QCTO.
- All information, documents, programmes and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of QCTO.
- Appointment is subject to both parties agreeing with the Service Level Agreement; both parties must sign the agreement.
- The successful bidder shall provide the service required based on the set timelines agreed with QCTO.
- Conditions stipulated in the general conditions of the contract will be applicable should any of the parties fail to deliver (read together with the Service Level Agreement signed by both parties).
- On termination of the agreement, for whatever reason (s), all documents, programmes, reports, must be handed to QCTO, The Service Provider relinquishes the right of retention thereof.
- Financial penalties will be issued as determined in the Service Level Agreement for late delivery of work packages not due to QCTO delays.
- The contract shall be for a maximum of 24 months.

Initials:

- Renewal for the next six (06) months shall be subject to satisfactory performance in the preceding six (06) months.
- Payment of Invoices shall be subject to satisfactory performance based on the pre-agreed criteria as per the SLA.
- The QCTO shall accept invoices on a per-completed module basis, not only for hours worked. The successful bidder should align their billing schedule with completed modules.
- The only exclusions to penalties shall be conditions the QCTO accepts to be beyond the service provider's control.
- Skills transfer to QCTO Software Developers.

13. GENERAL CONDITIONS OF CONTRACT

The General Conditions of Contract (GCC) must be accepted. QCTO reserves the right to implement remedies as provided for in the GCC.
The GCC can be downloaded from the Treasury Website. Please refer to the link below:
http://www.treasury.gov.za/divisions/ocpo/sc/GeneralConditions/General%20Conditions%20of%20Contract.pdf

14. SERVICE LEVEL AGREEMENT

The successful bidders will be expected to enter into a Service Level Agreement (SLA) with the QCTO.
The contract shall be for a maximum duration of 24 months subject to an annual appraisal and confirmation of compliance with the bid requirements.

The SLA will include, amongst others, the following:

i	Period of agreement.
ii	Pricing Conditions.
iii	Changes to the proposed team.
iv	Method of communication and reporting.
v	Non-performance.
vi	financial penalties and termination of the contract.
vii	Procedures relating to payments.
viii	Procedures relating to management reports.
ix	Terms of deliverables
x	Reviews.
xi	Uncompleted work.
xii	Confidentiality; and
xiii	Disputes.

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The QCTO has a standard template for Service Level Agreements into which both parties (QCTO and the successful bidder) will provide inputs. This SLA shall be the sole document governing the business relationship between the QCTO and the successful bidder. No additional agreements may supersede or govern the SLA.

15. ACCEPTANCE OF BID

QCTO does not bind itself to accept either the lowest or any other tender and reserves the right to accept the tender that it deems to be in the best interest of the organization. QCTO reserves the right to accept the offer in full or in par

16. TENDER VALIDITY PERIOD

The validity period for this bid is **180 days**.

17. ENQUIRIES

Any technical enquiries regarding the terms of reference shall be directed in writing to:
Mr. Tafadzwa Ramhewa
Email: ramhewa.t@qcto.org.za

Contact persons for SCM and administrative related issues:
Mr. Lekhotla Motloung
Email: tenders@qcto.org.za

Initials: