

## THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY

### Terms of Reference

#### THE APPOINTMENT OF SERVICE PROVIDER FOR THE PROVISION OF ASSET MANAGEMENT AND OCCUPATIONAL, HEALTH & SAFETY VERIFICATION

**No late applications will be accepted**

**Board members:** Mr T Tshefuta (Chairperson) | Ms C Brink | Mr L Nzimande  
Mr NN Maesela | Mr PB Makhafane | Mr MI Napo  
Ms T Molefe-Sefanyetso | Mr PB Moopelwa | Ms L Dlodla | Ms N Nzimande  
Ms N Silinyana | Mr M Ramakgale

**CEO:** Ms B Lerumo

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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.

The PSETA intends to appoint a service provider to provide a digitized solution that will allow the PSETA to undertake ongoing verification of its assets as well as its Occupational, Health and Safety (OHS) status to ensure compliance to regulatory prescripts.

The following needs to be catered for within the digitized solution :

- OHS inspections
- ISO 55001 – management system for Asset Management
- Proposal to be provided both for a voice-activated wearable Android platform as well as a smart device platform.

This document outlines the criteria and requirements for the selection of a suitable service provider for the digitization of the asset management and OHS verification processes.

## 2. BACKGROUND & CONTEXT

The PSETA is in the process of digitizing its manual processes. As part of the digitization strategy, we are required to ensure all manual business processes are automated by 2024/25 financial year. It is in this regard that we are looking for a service provider to assist the business with the implementation of this strategy to drive efficiency and productivity.

### **3. SCOPE OF WORK**

#### **3.1 DIGITIZED ASSET VERIFICATION SOLUTION**

The asset management verification solution must effectively track, maintain, and optimize assets throughout their lifecycle. Whether it's physical assets such as equipment, machinery, and vehicles, or intangible assets like software licenses and intellectual property, the asset management verification solution needs to provide a centralized platform that can be integrated with the PSETA's current Microsoft Dynamics 365 ERP system.

The asset management verification solution needs to be built on a voice-activated platform or one that can be operated using a smart device.

It is important that the solution provided for the Asset Management verification solution operates on the same platform as required for the Health and Safety verification solution.

Justification for the hosting of the solution on the service provider's server versus the loading onto the PSETA's server needs to be provided.

##### **3.1.1 Minimum Functionalities**

- **Comprehensive Asset Tracking:** track and manage various types of assets, including physical and intangible assets, providing detailed information such as location, condition, ownership, and maintenance history.
- **Streamlined Maintenance and Repairs:** automates maintenance workflows to schedule and manage preventive and corrective maintenance tasks efficiently. Should facilitate work order generation, notifications, and tracking of repair history to minimize downtime and extend asset lifespan.

- **End-to-end Asset Lifecycle Management:** Supports the entire lifecycle of assets, from procurement to disposal. Provides features for planning, budgeting, and decision-making related to asset acquisition, upgrades, replacements, and disposal.
- **Accurate Financial Management:** Provide for robust financial management capabilities, including accurate tracking of asset depreciation over time, compliance with accounting standards, and generation of financial reports and statements related to assets.
- **Compliance and Risk Mitigation:** Incorporate features that assist organizations in adhering to regulatory requirements and industry standards. Enable automated audits, and documentation management, and maintain a complete record of asset-related information to mitigate compliance risks.
- **Advanced Reporting and Analytics:** Reporting and analytics module that offers comprehensive reports, customizable dashboards, and data visualization capabilities. Provide insights into asset performance, utilization, maintenance costs, and other key metrics to enable data-driven decision-making and optimization of asset allocation.
- **Integration and Scalability:** Integration capabilities to seamlessly connect with other business systems such as ERP, CRM, or service management tools. Ensure scalability to accommodate organizational growth and expanding asset portfolios.
- **User-Friendly Interface and Accessibility:** User-friendly interface that enables easy navigation, data entry, and retrieval of asset information. Ensure accessibility across various devices and platforms to facilitate remote access and collaboration.
- **Security and Data Protection:** Prioritize data security by implementing robust security measures such as encryption, access controls, and regular data backups.

### 3.2t DIGITIZED OHS VERIFICATION SOLUTION

The OHS verification solution must allow for the PSETA staff to identify hazards, and raise incident reports using a digitized solution (voice-activated or smart device ).

It needs to provide automatic report generation to the selected server, allowing for final editing, approvals, and distribution.

The solution needs to provide a centralized platform that can be integrated with PSETA's current Microsoft Dynamics 365 ERP system.

The OHS verification solution needs to be built on a voice-activated platform or one that can be operated using a smart device.

It is important that the solution provided for the OHS verification operates on the same platform as required for the Asset verification solution.

Justification for the hosting of the solution on the service provider's server versus the loading onto the PSETA's server needs to be provided.

### 3.2.1 Minimum Functionalities

- Operating Platform: proposal to be provided both for a voice-activated wearable Android platform as well as a smart device platform.
- Customization: needs to allow for user set-up as per the PSETA environment.
- Verification input: must allow for various evidence inputs ( voice, text, video, pictures ).
- Verification output: provide for automatic report generation to the selected server, allowing for final editing, approvals, and distribution.
- Integration and Scalability: Integration capabilities to seamlessly connect with other business systems such as ERP, CRM, or service management tools. Ensure scalability to accommodate organizational growth and expanding asset portfolios.
- Compliance and Risk Mitigation: Incorporate features that assist organizations in adhering to regulatory requirements and industry standards. Enable automated audits,

and documentation management, and maintain a complete record of asset-related information to mitigate compliance risks.

- **User-Friendly Interface and Accessibility:** User-friendly interface that enables easy navigation, data entry, and retrieval of asset information. Ensure accessibility across various devices and platforms to facilitate remote access and collaboration.
- **Security and Data Protection:** Prioritize data security by implementing robust security measures such as encryption, access controls, and regular data backups.

### 3.3 PHYSICAL ASSET VERIFICATION

Perform 100% verification of all classes of moveable assets using existing structures and data format in the financial system fixed asset register. The verification must include the following:

- Identity barcoded assets in use but not on the Fixed Asset Register.
- Identify assets in use and not barcoded not on the Fixed Asset Register.
- Assets on the Fixed Asset Register are no longer in use or cannot be verified/stolen or damaged (useful life of the asset or remaining life of the asset to be done on yearly basis).
- Cost price of the asset.
- Identify assets with duplicate asset numbers.
- Identify assets that are idle / not allocated.

In addition to the above the following information is required per asset.

- Location of each asset – Location details.
- Responsibility Details.
- Custodian Details – Custodian Name, employee number, email address, telephone number
- Description Details – Asset Class, Asset Category, Full Detail Description
- Asset Condition: Condition of the Asset
- Old Asset numbers: Any old asset numbers must also be captured.

### 3.3.1 Barcoding of Assets

- Identify assets in use and not barcoded – Attach asset tags where no asset identification tag was previously affixed – liaise with the Organisation end-user and the Assets section in this regard. Ensure that existing barcode numbers and serial numbers are captured (there should be no duplicate numbers in the final report).
- With respect to Computer Equipment, Audio-visual Equipment, and certain other Equipment asset categories, verify, record, and report on the existence of assets that are assembled together in a parent/child relationship (e.g., a laptop, monitor, and docking station).
- PSETA to provide required barcoding labels.
- Explore the possibility of digital barcodes.

### 3.4 PHYSICAL OHS VERIFICATION

- Support the set-up and configuration of the OHS Verification platform with the PSETA Health and Safety representatives.
- The service provider is to conduct the initial OHS Verification with the selected PSETA OHS representatives, in order to establish the verified baseline.
- Review the baseline report with the PSETA OHS representatives to determine actions and understanding.

## 4. REPORTS

The system should be able to provide detailed, summary, management, and executive reports through business intelligence (BI) tools.

## 5. METHODOLOGY AND APPROACH



The service provider will conduct due diligence to assess the current AS-IS processes with the ICT, Finance, and Human Capital Management teams to understand the newly desired state/processes. This will be translated into a comprehensive project management and implementation plan with clear timelines and resources.

## **6. COMPETENCY AND EXPERTISE**

The service provider must meet the following requirements for eligibility:

- Minimum of 15 years' experience in system development to user requirement functional specification level.
- 5 years of digitization solutions development and system integration.
- 5 years' experience in server management and hosting.
- Excellent analytical and proven problem-solving ability, data analysis, and systems analysis skills.
- Excellent communication and interpersonal skills.
- Active knowledge of OHS standards.

## **7. TIMELINES OF THE CONTRACT**

This is a once-off implementation project, however, the service provider will be required to provide a 12-month maintenance and support programme that includes both “on-site” and “off-site” scenarios.

## **8. TRAINING OF PSETA STAFF**

For both the OHS and the Asset Management Verification platforms, the service provider is to plan for the following:

- One-on-one user training using a digitized learner methodology. ( built into the verification platform
- Administrator training using a digitized learner methodology. ( built into the verification platform ).
- Management sessions for receiving, understanding, and actions from the reporting module.

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

The service provider will report directly to the Project Steering Committee as appointed by the Chief Executive Officer of the PSETA.

## **10. PRICING**

The proposed total pricing must be inclusive of VAT. The PSETA may require a breakdown of rates on any of the services/items priced and BCM providers are required to provide the same. The PSETA reserves the right to negotiate the selection/prioritization of deliverables in line with the contract price.

## **11. EVALUATION PROCESS**

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

### **PHASE 1: FUNCTIONALITY EVALUATION**

Bids must meet the minimum eligibility criteria in respect of functionality of 70 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.

## PHASE 2

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

The evaluation will be based on:

Phase 1: Functionality Evaluation		
Phase 2: Preferential Point System	Points allocated for specific goals	Points
Price		80
<b>Special goals</b>		<b>20</b>
Black owned company	8	
Women	4	
Youth	5	
Disability	3	
<b>Total</b>	<b>20</b>	<b>100</b>

9.1.1 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.	Detailed Project Methodology and approach with a detailed list of the project tasks and skills transfer.	Little to no details is provided and/or proposal covers only one platform.	1	60
		Basic project plan and/or proposal covers only one platform.	2	
		Basic project plan including a proposal for both android and smart device platform was provided.	3	
		Less detailed project plan with specific task levels and responsibilities including a proposal for both android and smart device platform.	4	
		Very detailed project plan with specific task levels and responsibilities including a proposal for both android and smart device platform.	5	
2.	Project Lead Qualifications	Less than Diploma	1	5
		Diploma	2	
		Advanced diploma	3	
		Bachelor's Degree	4	
		Honours Degree	5	

NO	EVALUATION CRITERIA	GUIDELINES FOR APPLICATION	SCORE GUIDE	WEIGHT
3.	Experience in system development to user requirement functional specification level.	Less than 10 years experience	1	15
		10-12 years experience	2	
		13-14 years experience	3	
		15 years experience	4	
		More than 15 years experience	5	
4.	5 years of digitization solutions development and system integration.	No evidence was provided.	1	15
		Evidence provided with contactable details and 1-2 years experience.	2	
		Evidence provided with contactable details and 3 years experience.	3	
		Evidence provided with contactable details and 4 years experience.	4	
		Evidence provided with contactable details and 5 or more years experience.	5	
5.	5 years experience in server management and hosting.	Less than 2 years experience	1	5
		Evidence provided with contactable details and 2 years experience	2	
		Evidence provided with contactable details and 3 years experience	3	
		Evidence provided with contactable details and 4 years experience	4	

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
		Evidence provided with contactable details and 5 or more years experience	5	
	<b>Total</b>			<b>100</b>

## 12. FORMAT OF THE BID SUBMISSION

- 12.1. Company profile indicating all the requirements as per the evaluation criteria.
- 12.2. Proposals must be submitted in 3 copies, 1 original and 2 copies.
- 12.2. Team member names and roles.
- 12.3. CVs and certified copies of qualifications.
- 12.4. Track record and experience. Three signed reference letters of similar work reflect clients' telephone numbers and links or images of the work.
- 12.5. A valid Tax compliance status (TCS) PIN or proof of exemption from SARS.
- 12.6. Certified copy of BB-BEE certificate or affidavit
- 12.7. Copy of the registration document of the organisation (CIPC);
- 12.8. All Standard Bidding Documents (SBD) must be completed and signed.
  - SBD 1
  - SBD 4
  - SBD 6.1
  - Proof of registration on the Central Supplier Database.
  - General Condition of Contract (each page signed)

**NB: Failure to submit documents requested in section 12.8 will disqualify the proposal.**

Bid proposals must be submitted to:

Ms Ursula Mathonsi

Manager: Supply Chain Management

The PSETA

Ground Floor, Woodpecker Building, Hillcrest Office Park, Lynwood, Pretoria

No late applications will be accepted.

**No electronic bid applications will be accepted.**

The Validity periods of the bids is 90 days from the closing date. Please direct all queries to Ms. Ursula Mathonsi via email on [ursulam@pseta.org.za](mailto:ursulam@pseta.org.za) or telephonically on 012-4235700