



## **TERMS OF REFERENCE FOR THE SUPPLY OF A WEB-BASED LIBRARY MANAGEMENT SYSTEM TO THE DEPARTMENT OF HIGHER EDUCATION AND TRAINING LIBRARY**

### **1. PURPOSE**

- 1.1 The Department of Higher Education and Training (DHET) invites service Providers to provide quotations for the supply of a web-based library management system to the departmental library for a period of three years.

### **2. BACKGROUND**

- 2.1 The DHET library mainly caters for information and research needs of its primary clients, namely, the Ministry, stakeholders and officials of the Department as a whole.
- 2.2 The Department does this by building a collection of information resources in different formats such as print and electronic, that is made available to its clients.
- 2.3 The Department therefore wants to procure a web-based library management system which will enable the essential functions of the library to be done efficiently.
- 2.4 Service providers are requested to provide quotations for a comprehensive package of a web-based library management system to support various functions of the library.

### **3. SCOPE AND DEFINITION OF WORK**

- 3.1 The appointed service provider will be expected to supply a web-based library management system that will provide an electronic platform for the library to

perform essential functions such as collection development, cataloguing and classification, information searching, circulation, off site access of the collection, resource sharing, etc., as per specifications below:

### **3.2 Cataloguing and Acquisition**

- 3.2.1 A web-based comprehensive **Cataloguing module** which should enable the library to do cataloguing and classification of its material in both print, and electronic formats and to manage its collection. The module should enable the creation, storage, retrieval and management of bibliographic records and also enable the holdings to be shared with other libraries linked to the Department.
- 3.2.2 A web-based **Acquisition module** which should perform circulation functions such as ordering, receiving, claiming materials from suppliers, returns, cancellations of materials, etc.
- 3.2.3 The system should provide platform to **link to Worldshare / OCLC/ or Cloud based catalogues**, that will help in finding resources available at libraries worldwide and thus enabling the process of downloading bibliographic records of such resources. It should offer a comprehensive and cost-effective way to manage workflows efficiently and provide improved access to collections and services.

### **3.3 Online Public Access Catalogue**

- 3.3.1 A web-based **Online Public Access Catalog (OPAC)**. The Online Public Access Catalog must provide a platform for clients to access information resources available in the library. The OPAC must be accessible through the internet for offsite use. Clients should be able to login remotely using their smart phones and other devices. The OPAC should provide search functions for clients to do searches, save searches, check loan status, location information, as well as requesting for information resources. It should enable clients to communicate with the library about information sources without having to visit the library physically.

### **3.4 Periodicals Control**

- 3.4.1 A web-based **Periodicals Control Module** to manage placing of orders, receiving and recording, tracking orders, managing of periodicals and generating accounting and statistical information.

### **3.5 Circulation**

- 3.5.1 A web-based **Circulation module** which must perform circulation activities such as lending, returns, renewals, and reservations. The module must link bibliographic records and patron records and be able to generate reports.

### **3.6 Information Searching and Retrieval**

- 3.6.1 A web-based **information searching module** that will provide a platform for information retrieval by providing a search function to look up library items. It should provide various search options such as title, author, subject, ISBN, keywords, etc. showing availability of the items as well as their location and status.
- 3.6.2 A web-based platform linking to an **Interlending database** which can be used to facilitate resource sharing amongst various libraries in South Africa and beyond. This module should provide a functionality to enable the departmental library to make its holdings visible and accessible to other libraries, as well as to view and access holdings of other libraries. The database should provide a functionality to enable the process of sharing the collections with the rest of the libraries that are on the network.
- 3.6.3 **Administrative module** to perform functions like report generation, inventory, statistics , printing labels/ barcodes, importing and exporting of records from / to MARC formats, Web OPAC, Z39.50, client and/or server services, and security systems linked to or integrated with the cataloging / circulation module.

## **4. DELIVERABLES**

- 4.1 Ability of the system to perform acquisitions, cataloguing and classification functions electronically in accordance with internationally approved cataloguing and classification rules and standards. Ability for data backup and restoration.

- 4.2 Ability of the system to provide a web based platform for online access to the library catalogue for clients of the department from any location.
- 4.3 Ability of the system to perform periodical management functions and keeping records of all the periodicals ordered and received, as well as ability for data backup and restoration.
- 4.4 Improved library circulation function linking patron records with patron activity and ability to track and provide summary of activity.
- 4.5 Ability of the system to provide search function which will enable searching of information resources and providing the location thereof. It should provide various search options such as title, author, subject, keywords, ISBN, etc, showing the location of items and their status.
- 4.6 Capability of the system to provide a platform for accessing and sharing resources with other libraries.
- 4.7 Ability to keep the system up to date and provide upgrades when needed, as well as maintenance and training support to the clients as and when required.

## **5. APPROPRIATE QUALIFICATIONS, EXPERIENCE, SKILLS AND KNOWLEDGE**

- 5.1 Previous experience of having implemented online library management systems before in the last 5 years, with reference letter as proof.
- 5.2 Technical skills pertaining to the online library management system.
- 5.3 System maintenance and support skills.
- 5.4 Knowledge of online library management platforms, products and services, as well as technical knowledge thereof.

## **6. TRAINING AND SUPPORT**

- 6.1 Service providers must be able to provide support as well as training on the use of the databases, and refresher training as and when there are new interfaces and changes.

## **7. DURATION OF THE CONTRACT**

- 7.1 The successful service provider will be appointed for a period of three (3) years.

- 7.2 The services of a recommended service provider will commence on the date the service provider receives a purchase order from the Department.

## 8. MONITORING AND REPORTING

- 8.1 The Sub: Directorate: Information Resource Centre will monitor the implementation of the project and to ensure that the objectives of the project are met.
- 8.2 The service provider will report to the Sub: Directorate: Information Resource Centre and submit work-in progress reports by email to the Sub: Directorate: Information Resource Centre.

## 9. EVALUATION CRITERIA

- 9.1 The following table reflects the evaluation criteria that will be used in evaluating the technical submission.

No	Element	Weight
1	<p><b>Company Experience</b></p> <ul style="list-style-type: none"><li>• Ability to demonstrate proven track record of similar work completed in the each of the main activities provided under the scope as follows:<ul style="list-style-type: none"><li>▪ Provision of a web-based comprehensive <b>Cataloguing and Acquisition modules</b> which should enable the library to perform acquisitions, cataloguing and classification of its material in both print, and electronic formats and also linking access to worldwide catalogues = <b>10 points</b></li><li>▪ Provision of a web-based <b>Online Public Access Catalog (OPAC)</b> which must provide a platform for clients to access the library catalog and also available for offsite use. = <b>5 points</b></li></ul></li></ul>	45

No	Element	Weight
	<ul style="list-style-type: none"> <li>▪ Provision of a web-based <b>Periodicals Control</b> Module to manage placing of orders, receiving and recording, tracking orders, managing of periodicals and generating accounting and statistical information. = <b>5 points</b></li> <li>▪ Provision of a web-based <b>Circulation Module</b> which must perform circulation activities such as lending, returns, renewals, and reservations. The module must link bibliographic records and patron records and be able to generate reports. = <b>5 points</b></li> <li>▪ Provision of a web-based <b>Information Searching Module</b> that will provide a platform for information retrieval by providing a search function to look up library items. = <b>10 points</b></li> <li>▪ Provision of a web-based platform linking to an <b>Interlending Database</b> which can be used to facilitate resource sharing amongst various libraries in South Africa and beyond. This module should provide a functionality to enable the departmental library to make its holdings visible and accessible to other libraries, as well as to view and access holdings of other libraries. = <b>5 points</b></li> <li>▪ Administrative module to perform functions like report generation, inventory, statistics , printing labels/ barcodes, importing and exporting of records from / to MARC formats, Web OPAC, Z39.50, client and/or server services, and security systems linked to or integrated with the cataloging / circulation module. = <b>5 points</b></li> </ul>	
2	<p><b>Experience and qualifications of the Project Team</b></p> <ul style="list-style-type: none"> <li>▪ Experience relevant to the project requirements (Attach CVs' and summary table of all the team members): <ul style="list-style-type: none"> <li>▪ Ability to demonstrate five years previous experience, technical skills as well as knowledge in the provision online library management systems including contactable references inclusive of description of projects undertaken.= <b>15 points</b></li> </ul> </li> </ul>	20

No	Element	Weight
	<ul style="list-style-type: none"> <li>▪ Cvs and Certified copies of qualifications attached = <b>5 points</b></li> </ul>	
3	<b>Methodology and design</b> <ul style="list-style-type: none"> <li>• The Bidders detailed approach and methodology that will be used to carry out the project as follows: <ul style="list-style-type: none"> <li>▪ If the approach and methodology includes all requirements as detailed in the ToR's = <b>25 points</b></li> </ul> </li> </ul>	25
4	<b>Transfer of Skills – methodology, approach and steps to transfer skills to staff</b> <ul style="list-style-type: none"> <li>▪ Demonstrate how skills will be transferred to the relevant users = <b>5 points</b></li> <li>▪ Training and refresher training on the library management system for library staff = <b>5 points</b></li> </ul>	10
	<b>Total</b>	<b>100</b>

## 10. EVALUATION PROCESS

10.1 The Proposals will be evaluated on the 80/20 principle in terms of the Preferential Procurement Policy Framework Act of 2000 and its Regulation.

**The evaluation phases will be as follows:**

### 10.1.1 Phase 1

Proposals will be evaluated on administrative compliance in terms of submission of correct and completed required Tender/RFQ documentation as requested.

### 10.1.2 Phase 2

Proposals will be evaluated on functionality in accordance with the evaluation criteria as per the table above on paragraph 09.

Bidders must obtain a minimum of 70 points on functionality evaluation to advance to the final phase of evaluation.

#### **10.1.3 Phase 3**

Proposals will be evaluated and scored on points for price and Specific Goals as per the Preferential procurement Regulations, 2022.

### **11. PRICING AND COSTING**

- 11.1 Bidders must provide a FULL cost breakdown [per deliverable; per package; subscription fees, escalations (if applicable), other costs, etc.] where VAT is indicated separately.

#### **Enquiries:**

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