

---

**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP, MAINTAIN AND SUPPORT SERVICES FOR AUTOMATION OF SUBMISSION PROCESSES FOR A PERIOD OF TWELVE (12) MONTHS.**

---

**1 BACKGROUND**

- 1.1 This document outlines the Terms of Reference (TOR) for the implementation of a submission process (e-Submission System – Submission, Memo, Leave & Correspondence) to streamline and digitize the submission processes within the organization. The system will serve as a crucial tool in enhancing efficiency, transparency, and accountability across all departments.
- 1.2 DMPR requires a modern online system to streamline and digitize the submission processes within the organization. The system will serve as a crucial tool in enhancing efficiency, transparency, and accountability across all departments.

**2. CONTRACT PERIOD**

- 2.1 The contract period is 12 months after signing of the service level agreement.

**3. OBJECTIVE**

The primary objectives of the e-Submission System (Submission, Memo, Leave & Correspondence) are to:

- 3.1 Enable the electronic submission, tracking, and management of documents within the department.
- 3.2 Improve workflow efficiency by reducing manual handling and processing times.
- 3.3 Enhance transparency and accountability through audit trails and tracking features.
- 3.4 Facilitate easy access to submitted documents by authorized personnel.
- 3.5 Support the Director-General's office with a reliable and secure platform for e-submissions.
- 3.6 Integrate Microsoft-based technology to ensure compatibility with existing IT infrastructure.

- 3.7 Utilize SSA-approved LawTrust e-signature for secure and legally compliant electronic document signing.
- 3.8 Support and maintain the submission process solution for a period of twelve (12) months.

#### 4. **SCOPE OF WORK**

The successful service provider is expected to do the following:

- 4.1 **System Design and Development:** Design and develop a user-friendly, secure, and scalable e-Submission System leveraging Microsoft-based technology. **Annexure A - D** is Submission & Correspondence processes, **Annexure E** is Leave processes, Annexure F is templates and **Annexure G** is Business Requirements document.
- 4.2 **Integration:** Integrate the e-Submission System with existing Microsoft IT infrastructure (e.g., SharePoint, Office 365) and relevant software applications.
- 4.3 **Electronic Signature:** Implement SSA-approved LawTrust e-signature functionality to ensure secure and legally compliant document signing.
- 4.4 **User Roles and Permissions:** Define user roles, permissions, and access levels to ensure secure document handling.
- 4.5 **Training:** Provide training sessions for end-users and administrators to ensure smooth adoption of the system.
- 4.6 **Testing and Deployment:** Conduct thorough testing to ensure the system's reliability, security, and compliance with e-signature requirements before full deployment.
- 4.7 **Support and Maintenance:** Provide ongoing technical support and system maintenance to address any issues post-implementation
- 4.8 **Skills Transfer** to internal resources on the maintenance of the system.
- 4.9 **System Documentation:**
  - Develop functional requirements specification.
  - Develop system technical specification.
  - Develop Database Schema (Entity Relationship Diagram).
  - System User Manual.

## **5. DELIVERABLES OR PROJECT OUTPUT AND/OR OUTCOME**

**5.1 The successful service provider is expected to do** but not limited to the following requirements:

- 5.1.1 A fully functional e-Submission System (Submission, Memo, Leave & Correspondence) tailored to the organization's needs, incorporating Microsoft-based technology and LawTrust e-signature.
- 5.1.2 Functional three Tier Environment (DEV, TEST, PROD).
- 5.1.3 Source code and source control.
- 5.1.4 Comprehensive user and technical documentation
  - Functional Specification Document.
  - Technical Specification Document.
  - Entity Relationship Diagram.
  - User Manuals
- 5.1.5 Detailed implementation report outlining the system's features, deployment process, and any challenges encountered.
- 5.1.6 Training materials and sessions for all relevant personnel.
- 5.1.7 Skills Development/Transfer Plan outlining how the service provider will train DMPR Officials during the duration of the project.

## **6. EVALUATION CRITERIA**

**This bid will be evaluated in four stages, i.e. functionality, mandatory requirements, administrative compliance and point scoring system.**

### **6.1 Gate 01 – Mandatory requirements**

- (i) Relevant OEM accreditation (e.g., Microsoft certification)

### **6.2 Gate 02 Functionality**

Bidders will be scored in terms of the functional requirements indicated in the table below. The corresponding points and weightings will be used to calculate the overall score a bidder has achieved. The minimum threshold for this bid is **70%**. Bidders who score less than **70%** will be disqualified. Only bidders that score **70%** and more will be considered further.

<b>No.</b>	<b>Evaluation criteria</b>	<b>Points</b>	<b>Weight</b>
<b>1.</b>	<p><b>Company Experience</b></p> <p>Bidders should have experience of having undertaken projects in the past five (5) years, in respect of e-Submission.</p> <p>Proof from contactable referees indicating that similar project was executed should be attached for specified years of experience and point will only be allocated according to the reference letters</p> <p>(Attach contract/s or SLA or orders, completion letters/certificates and testimonials from contactable references)</p>	<p>4 or more projects = 5 points</p> <p>3 projects = 4 points</p> <p>2 projects = 3 points</p> <p>1 projects = 2 points</p> <p>No projects = 0 point</p>	<b>20</b>
<b>2.</b>	<p><b>Experience of Team Leader and Team Members</b></p> <p><b>Experience:</b></p> <p><b>Team Leader</b></p> <p>(i) The team leader must have experience of having been involved in e-Submission projects</p> <p>(Attach detailed CV highlighting relevant projects, with contactable references)</p> <p><b>Team members</b></p> <p>(ii) Team member/s must have experience of having been involved in e-Submission projects.</p>	<p>6 or more projects = 5 points</p> <p>5 projects = 4 points</p> <p>4 projects = 3 points</p> <p>3 projects = 2 points</p> <p>2 or less projects = 1 point</p> <p>No indication = 0 points</p> <p>6 or more projects = 5 points</p> <p>5 projects = 4 points</p>	<p><b>20</b></p> <p>5</p> <p>10</p>

No.	Evaluation criteria	Points	Weight
	<p>(Attach detailed CV highlighting relevant projects, with contactable references)</p> <p>(iii) The Team Leader must have exposure to development of e-Submission using SharePoint and Microsoft 365 technology in the past five (5) years.</p> <p>(Attach detailed CV highlighting experience in development of e-Submission using SharePoint and Microsoft 365 technology, and copy/copies of qualification/s that reflect IT and or Microsoft Certification in SharePoint)</p>	<p>4 projects = 3 points  3 projects = 2 points  2 or less projects = 1 point  No indication = 0 points  <b>(Number of projects = average of the team members)</b></p> <p>Has experience and knowledge in development of e-Submission using SharePoint and Microsoft 365 technology = 5 point</p> <p>No indication = 0 points</p>	<p>5</p>
3.	<p><b>Qualifications of Team Leader and Team Members</b></p> <p><b>Qualifications:</b></p> <p><b>Team Leader qualifications</b></p> <p>(i) Team leader must have a formal relevant tertiary qualification recognised by SAQA (Attach certified copies of relevant qualification/s)</p>	<p>NQF level 8 = 5 points  NQF level 7 = 4 points  NQF level 6 = 3 point  Below NQF level 6 = 2 points  No qualification = 0 points</p>	<p><b>20</b></p> <p>5</p>

<b>No.</b>	<b><i>Evaluation criteria</i></b>	<b><i>Points</i></b>	<b><i>Weight</i></b>
	<b>Team member qualifications</b> (ii) Team member(s) must possess formal relevant tertiary qualification recognised by SAQA (Attach certified copies of relevant qualification/s)	NQF level 7 = 5 points NQF level 6 = 4 points NQF level 5 = 3 point Below NQF level 5 = 2 points <b>(Number of projects = average of the team members)</b>	15

<b>No.</b>	<b>Evaluation criteria</b>	<b>Points</b>	<b>Weight</b>
<b>4.</b>	<b>Project Plan</b>		<b>10</b>
	(i) Detailed project plan with <ul style="list-style-type: none"> <li>➤ Project deliverables</li> <li>➤ Logistics plan</li> <li>➤ Key milestones</li> <li>➤ Scope</li> <li>➤ Schedule</li> <li>➤ Contingencies</li> </ul> (Attach project plan) based on scope on paragraph 4.	Detailed project plan with project deliverables that covers the entire scope and detailed logistics plan, milestones, scope, schedule, cost, resources & change management plan = 5 points  Project Plan does not cover the scope or No project plan submitted = 0 points	10
	(ii) Propose methodology outlining. <ul style="list-style-type: none"> <li>➤ Management of the project.</li> </ul> (Attach methodology proposal)	Methodology outlining management of project = 5 points  Methodology not provided = 0 point	5
<b>5.</b>	<b>Proposed Solution Presentation (Prototype)</b>	Detailed proposed solution\ Prototype that covers all the functionality =5 points  Non submission of proposed solution\ prototype =1 point	<b>25</b>
<b>6.</b>	<b>Skill Transfer</b>	Detailed Proof of capability to Transfer skill =5 points  Non submission of proof of capability Transfer skill not provided=1 point	<b>5</b>

**Formula;**  $\frac{A}{B} \times 100 = C\%$

Where:      A = Total score for the bid under consideration  
              B = Maximum possible score  
              C = Percentage score for the bid under consideration

### **6.3 Gate 02 – Mandatory requirements**

The following requirements are mandatory. Bidders who do not comply with the mandatory requirements will be disqualified.

- (i) Microsoft certification (MS 365, MS SharePoint, MS Power, MS Power flow's etc.)

### **6.4 Gate 03 - Administrative compliance**

- (i) Compliance to the specification / Terms of Reference.
- (ii) Fully completed SBDs (Duly signed and dated) listed hereunder
  - SBD 1
  - SBD 4
  - SBD 6.1
- (iii) The following will be regarded as noncompliance.
  - Price amendments / other amendments without signature/initials.
  - Use of correctional fluid
  - Completion of the bid document in coloured ink other than black ink

### **6.5 Gate 04 – Point Scoring System**

Bids will be evaluated on the 80/20 preference point system as outlined in the Preferential Procurement Regulation of 2022.

- Price points = 80
- Preferential points = 20

6.4.1 The bidder that scores the highest points in this phase will be awarded the tender.

6.4.2 Should more than one bidder score the same number of points, the award will be made to the bidder who scores more points on specific goals.



6.4.3 Should there be more than one bidder who score the same number of points overall and same points on specific goals, the award will be made to the bidder who scored the highest points on functionality.

6.4.4 Should there be more than one bidder who score the same number of points in all aspects, the bid will be determined by the drawing of the lot.

6.4.5 The preferential points will be allocated in terms of the Departmental objectives on specific goals. Points allocation on specific goals are tabulated hereunder.

6.4.6 Bidders who do not submit proof (means of verification) of specific goals claimed will not qualify for preference points for specific goals.

Specific Goal	Number of points (80/20 Preference System)	Means of Verification
Enterprise owned by Black people	4	Identity documents and CIPC document
Enterprise owned by Women	4	Identity documents and CIPC document
Enterprise owned by Youth	4	Identity documents and CIPC document
Enterprise owned by disabled persons	4	Medical certification
Enterprise owned by SMMEs (QSE or EME)	4	B-BBEE certificate issued by a SANAS accredited Agency or DTIC, or Sworn affidavit

**NB:** "Ownership = 51% of the company share. Designated group/person that are part of the entity directorship but have less than 51% share = points will be calculated on a pro-rata basis in relations to the share/s held by the designated group/persons.

Eg.    Number of women directors            = 01  
        Shares owned by women                 = 20%  
        Specific goal for women                 = 4 points  
        Points claimable for women ownership =  $\frac{20}{100} \times 4 = \mathbf{0.8 \text{ points}}$

## **7. REPORTING REQUIREMENTS**

- 7.1 Service provider will report to the Chief Information Officer or delegated official.
- 7.2 Service provider will be expected to provide various reports monthly (e.g. project status report) in a form of Portable Document Format (PDF)/ Microsoft standard format, as well as provide any other project related report/s as requested by the Department.
- 7.3 The service provider shall participate in compulsory meetings with the Department as stipulated in the Service Level Agreement (SLA) throughout the duration of the agreement. In the event of emergencies, either party may initiate a meeting, and both parties shall make reasonable efforts to attend.
- 7.4 Service provider will be expected to provide all the project management documents in line with the DMPR methodology.
- 7.5 The service provider shall develop and deliver training materials and sessions for all relevant personnel to ensure effective knowledge transfer and system adoption.
- 7.6 The service provider shall submit a Skills Development and Transfer Plan, detailing the approach and schedule for training execution.
- 7.7 The service provider shall ensure ongoing engagement with DMPR officials for the duration of the project to facilitate collaboration and alignment.

## **8. WORK PLAN AND METHODOLOGY**

- 8.1 The service provider must provide:
  - 8.1.1 A project proposal that demonstrates comprehension and competence to deliver on what is required in line with the scope of work under section 4.
  - 8.1.2 A preliminary project plan outlining key activities, milestones, timeframes, and resources to be committed to the project.

## **9. ROLE AND RESPONSIBILITY**

- 9.1 Service Level Agreement will be entered into with the successful service provider which will include, *inter alia*, obligations of the DMPR and the successful service provider.

- 9.2 The DMPR reserves the right to appoint more than one service provider for the project.
- 9.3 The successful service provider must develop detailed project schedule/ plan.
- 9.4 The successful service provider will be required to submit payment schedule providing projections for the period of 6 months on work performed.
- 9.5 The service provider shall disclose all information in its proposal regarding any interests that may result in an actual or perceived conflict of interest.

## **10. CONFIDENTIALITY OF INFORMATION**

- 10.1 The names of all the members of the service provider team must be disclosed for the prior approval of DMPR. Any changes, replacements and additions should be submitted for prior approval of DMPR.
- 10.2 All members will have to sign a Non-Disclosure Agreement before project commencement and may be required to undergo security screening and tests as the DMPR deems necessary.

## **11. PAYMENT**

- 11.1 The Department will not make an upfront payment to a successful service provider. Payment will only be made in accordance with the delivery of service that will be agreed upon by both parties and upon receipt of an original invoice.
- 11.2 The payment will only be made in accordance with the delivery of service that will be agreed upon by both parties and receipt of an original invoice.

## **12. TAX CLEARANCE CERTIFICATE**

- 12.1 Bidders must ensure compliance with their tax obligations.
- 12.2 Bidders are required to submit their unique personal identification number (pin) issued by SARS to enable the organ of state to view the taxpayer's profile and tax status.
- 12.3 Application for tax compliance status (TCS) or pin may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS as e-filers through the website [www.sars.gov.za](http://www.sars.gov.za).
- 12.4 A bidder may also submit a printed TCS together with the proposal.

- 12.5 In proposals where consortia / joint ventures / sub-contractors are involved, each party must submit a separate proof of TCS / pin / CSD number.
- 12.6 Where no TCS is available but the bidders is registered on the central supplier database (CSD), a CSD number must be provided

### **13. DOCUMENTATION**

- 13.1 Not Applicable

### **14. COST / PRICING**

- 14.1 The bidders are requested to provide a quoted proposal regarding the work to be undertaken.
- 14.2 Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. The total cost must be VAT inclusive and should be quoted in South African Rands (i.e. ZAR).
- 14.3 Bidders should provide hourly rates as prescribed by Department of Public Service and Administration (DPSA), Auditor- General (AG) or the body regulating the profession of the consultant.
- 14.4 Bidders should provide (Subsistence & Travel (S&T)) rates that are in aligned to the National Treasury instruction note as follows:
  - i) Hotel Accommodation – R1550 per night per person, including breakfast, dinner and parking.
  - ii) Air travel must be restricted to economy class.
  - iii) Claims for kilometres may not exceed the rates approved by the Automobile Association of South Africa.

### **15. CONDITIONS OF THE CONTRACT**

- 15.1 The General Conditions of Contract must be accepted as these are issued by National Treasury and are non-negotiable.
- 15.2 The successful service provider will sign a confidentiality agreement regarding the protection of DMPR information that is not in the public domain.

- 15.3 No state information may be furnished/ communicated to the public or news media by the security service provider or any of their employees.
- 15.4 The successful service provider shall ensure that the contract is executed in line with the scope of work.
- 15.5 The successful service provider may be subjected to security screening by the State Security Agency.
- 15.6 The DMPR reserves the right to verify the authenticity of the information submitted, any falsified information may result in the disqualification or cancellation of the contract.

## **16. FORMAT OF SUBMISSION OF PROPOSAL**

- 16.1 Bidders are requested to **submit two (02)** copies of technical proposals plus the original.
- 16.2 Bidders are requested to index their proposals for easy reference.

## **17. PRE-BID MEETING / BRIEFING SESSION DETAILS**

- 17.1 A compulsory briefing session will be held on **01 October 2025 at 10:00** on **Microsoft Teams to conduct briefing session:**  
**Meeting ID: 363 263 960 556**  
**Passcode: AY3V2u2P**
- 17.2 Bidders must ensure that they sign a register during a compulsory briefing session to confirm attendance. Failure to sign the register to confirm attendance will invalidate your bid.

## **18. CLOSING DATE**

- 18.1 Proposals must be submitted on or before **17 October 2025 at 11:00** at Department of Mineral and Petroleum Resources, at Building 2B, Trevenna Campus, C/O Meintjes and Francis Baard Street, Sunnyside Pretoria in the bid box marked, Department of Mineral & Petroleum Resources. **No late bids will be accepted.**

**19. ENQUIRIES**

**19.1 All general enquiries relating to bid documents should be directed to:**

Mr. Lucia Nkhethoa

Tel No: (012) 444 3778

E-mail: [Lucia.Nkhethoa@dmp.gov.za](mailto:Lucia.Nkhethoa@dmp.gov.za)

**19.2 Technical enquiries can be directed to:**

Mr. Kgoroshi Malefo

Tel No: 071 475 8433 / 012 44 3086

E-mail: [Kgoroshi.Malefo@dmre.gov.za](mailto:Kgoroshi.Malefo@dmre.gov.za)