REQUEST FOR PROPOSALS:

APPOINTMENT OF SERVICE PROVIDER TO DEVELOP ENTERPRISE ARCHITECTURE AND PROCESS MODELLING TOOL FOR THE MERSETA'S DIGITAL ECOSYSTEM AS PART OF THE PSET CLOUD PROGRAMME

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1.   BACKGROUND

JET Education Services (JET)[1], in collaboration with the Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA)[2], have initiated a programme (PSET CLOUD) that seeks to address the development of an integrated national digital ecosystem that is interoperable and can be used for effective skills planning and provisioning.

The purpose of the overall project is to establish an integrated digital ecosystem that will strengthen, integrate, coordinate, and improve efficiencies in the governance and management of the post-school education and training (PSET) system. The main objective of the project is to ensure that data sets are interoperable, well synchronised, and used effectively as sources of information for planning and improving efficiency in the PSET system.

A critical aspect of the programme is to ensure that, as the early adopter of this innovative programme, merSETA's digital ecosystem (i.e., its internal systems and ICT infrastructure) can support the free flow and advantageous use of data available to various institutions and organisations involved in the PSET sector. In so doing it will be able to (i) enhance skills planning and provisioning, and (ii) strengthen, integrate, coordinate and improve efficiencies in the governance and management of post-school education and training. As such the merSETA is assisting in the definition of the PSET CLOUD MVP and readying itself for participation on the PSET CLOUD platform.

In light of this desired end goal, and based on a state of readiness, maturity assessments, as well as gap analyses of merSETA's technology, people, processes, and information, were conducted with reports and recommendations produced in 2018 (Phase 1); the findings of which serve as the priorities for merSETA's Digital Ecosystem Programme over 2020 and 2024 (Phases 2 – 4) with a specific focus on:

- Enterprise Architecture
- Information & Records Management
- Data Management
- Knowledge Management
- Technology

All of the above are underpinned by good governance, optimised business processes, and effective change management.

JET, as the implementing partner in the digital ecosystem component of the PSET CLOUD programme, is assisting the merSETA with resource provisioning, procurement, and management of these services.

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[1] JET Education Services (JET) is an independent non-governmental organisation founded in 1992 which works with government, the private sector, international development agencies and education institutions to improve the quality of education and the relationship between education, skills development and the world of work. JET's focus areas in the education sector are: education research and planning; monitoring and evaluation of education and training programmes; school and district improvement; and Technical and Vocational Education and Training (TVET) College improvement and youth livelihoods.

[2] The merSETA is the Manufacturing, Engineering and Related Services Education and Training Authority established to promote the Skills Development Act, (Act 97 of 1998). It facilitates skills development in the following sub sectors: metal, automotive manufacturing, retail motor and component manufacturing, new tyre manufacturing and plastics manufacturing.

2.   OBJECTIVE OF THE ASSIGNMENT

JET and the merSETA seek to appoint a qualified and expert service provider to:

(i)   provide an enterprise architecture modelling and management tool or platform, and

(ii)   develop a training and skills on boarding plan to ensure effective use of the tool.

The proposed tool should provide Business Process Mapping capabilities in line with BPMN 2.0 standards.

3.   PROJECT/ CONTRACT PERIOD

The contract/license period will be 12 months, with renewal periods allowed as per license renewal frequency or needs of the chosen tool.

4.   SCOPE OF THE PROJECT

The envisaged tasks will take place at the merSETA Head Office in Johannesburg and at its regional offices located as follows: Johannesburg (Gauteng South Regional Office), Rosslyn (Gauteng North and North West Regional Office), Durban (KZN Regional Office), Durbanville (Western Cape Regional Office), Port Elizabeth (Eastern Cape Regional Office), Bloemfontein (Free State and Northern Cape Regional Office) and Witbank (Mpumalanga and Limpopo Regional Office).

The scope of the project will include the supply of the modelling tools for the Enterprise Architecture following:

4.1.   Supply of the Modelling Tool for the Enterprise Architecture

The merSETA Enterprise Architecture team currently performs the following activities:

- **Create Architecture Vision -** Defining the scope, identifying the stakeholders, creating the Architecture Vision, and obtaining approvals.
- **Develop Business Architecture -** Describing the Baseline Business Architecture, developing a Target Business Architecture to support the agreed Architecture Vision; and conducting a gap analysis between the Baseline and Target Business Architectures.
- **Develop Information Systems Architecture -** Developing an Information Systems Architecture for merSETA, including the development of Data and Application Architectures.
- **Develop Technology Architecture -** Developing a Technology Architecture that maps application components to a set of technology components that represent software and hardware components, which are either available from the market and/or configured within the merSETA into technology platforms.
- **Identification of Opportunities & Solutions -** Identifying projects, programmes, and or portfolios that effectively deliver the Target Architecture as identified.

The merSETA intends to make use of the Enterprise Architecture tool to manage all of the above-mentioned Enterprise Architecture activities and deliverables and must meet the criteria stipulated in Table 1.

Table 1: Enterprise Architecture Criteria

1. Functional criteria		Ability to develop graphical and textual representations depicting objects and relationships between them
	1. Modelling	Ability to develop graphical and textual representations depicting objects and relationships between them
	2. Collection/ Import	Ability to collect, capture or load information about existing objects and their relationships via various file formats (e.g. Visio)
	3. Publishing	Ability to present information stored in the repository in a user-friendly and static format (e.g., portals, dashboards, HTML, etc.)
	4. Export/ Generation	Ability to export information modeled and stored in the tool repository in some standard format for use by another application
	5. Reporting	Ability to produce a variety of reports to suit the reporting requirements of both business and IT consumers
	6. Planning	Ability to develop plans that define the initiatives needed to address the gaps between the "as-is" and "to-be" architectures
	7. Analysis	Ability to provide insight into the architectural objects, their attributes, and relationships, through analyses and reporting
2. Technical criteria	1. Portals	Ability to access key administrative and user functionality (object maintenance, configuration, etc.) via a thin client front end
	2. Workflow	Ability to support workflows to collaboratively create, review, approve and distribute the artifacts modeled and analyzed
	3. Access Control	Ability to control user access to read or modify repository content and information
	4. Version Control	Ability to manage several unique versions of architecture artefacts, compare different versions, and resolve conflicts
	5. Integration	Ability to integrate with existing applications, systems, databases, etc. to collect and capture data about existing objects
	6. Object Repository	Ability to define the entities, attributes, and relationships that are required to create, store, and manipulate models

	7. Standards	Ability to provide support for different architecture frameworks (e.g., Zachman, TOGAF, custom, etc.)
	8. DB Administration	Ability to facilitate the administration and management of the content stored in the repository database
	9. Customization	Ability to customize and modify "out-of-the-box" tool components such as UI, meta-model, reports, modules, menus etc.
3. Vendor capability criteria	1. Vendor Profile	Geographic reach, industries, locations, implementation experience, modeler community and languages supported
	2. Implementation	Level of customization offered, integration with other tools, time taken for implementation, and infrastructure requirements
	3. Support	Types of support models offered, range of consulting, training, and support services available from the vendor

4.2. Supply of the Modelling Tool for Business Processes

The business process management tool should be able to deliver on, but not limited to, the following:

- **Import capabilities –** There are current business process maps that have been developed and the tool should offer the capability to import existing process maps.
- **Identify process deficiencies –** The tool or platform through BPMN2.0 standards should be able to identify process deficiencies and existing loopholes.
- **Integration/compatibility –** Proposed BPM tool or platform should offer capabilities to integrate or sync with the proposed EA tool or platform.
- **BPMN 2.0 –** Proposed tool or application should be compliant with Business Process Management Notion 2.0 standards for process modelling.
- **Reporting –** The proposed platform should provide reporting capabilities that can assist business with decision making.
- **Risk Management –** The proposed tool should provide capabilities for integrating elements of risk management.

Table 2: BPM Criteria:

BPM 2.0	The ability to support modelling in the bpm 2.0 standard or notation	20%
Ease of use	Business Oriented tool	10%
BPM Level Reporting	Reporting that checks transactions processed, how many failed, and what the average processing time was.	20%
Process Insight	BPM tool that provides insight to enforce best practices in specific processes	10%

Process Simulation	Ability to test and analyse both current business processes and those that have not yet been implemented	20%
Repository	Ability to save Processes	20%
	Total	**100%**

4.3. Training

The proposal should also indicate the capacity of the bidder to conduct training sessions for the merSETA's staff and IT teams on the use of the Enterprise Architecture tool and should provide details on how such training will be carried out.

5. DELIVERABLES/OUTPUT

The following outputs/deliverables will be expected for the duration of the project contract period:

- The supply, training, and support of the Enterprise Architecture and Process Modelling tool for the merSETA.
- Scope of Work detailing the programme of work to be assessed and implemented against this RFP.
- Project charter with a detailed project plan developed indicating all the timeframes for agreed deliverables. Project plan to clearly outline how the tool will be rolled out, including the training and onboarding of the merSETA staff.

6. SUBMISSION REQUIRMENTS

6.1. Provide evidence that the service provider understands the key concepts of the following domains
- Enterprise Architecture
- Enterprise Architecture Modelling standard
- Enterprise Architecture frameworks such as TOGAF and Zachman
- Business Process Management modelling
6.2. Bidder must have a minimum of three years of experience in providing and supporting projects of this nature. Failure to meet this requirement will result in disqualification.
6.3. A technical proposal per scope outlined in this RFP that clearly outlines how this assignment will be carried out. This includes a high-level project plan clearly indicating deliverables and project duration, the overall resources needed (such as hardware, software, facilities, materials, and personnel), any site-specific implementation requirements, transfer of skills, project close-out, and reporting.
6.4. Any additional service offering relevant to the scope of work.
6.5. An organogram of the project structure clearly positioning the various members of the proposed team
6.6. The response must indicate the project team consisting of at least a suitably qualified and experienced project lead. The following should be provided:
- Detailed CVs of the team leader and members
- Evidence that the proposed team are certified current members of the relevant professional bodies and have the relevant experience and qualifications issued by professional bodies.
6.7. Company profile that includes:
- A detailed list of completed contracts/projects with references for similar work undertaken. The list of references must highlight the name of the company,

description of contract, date of contract, contact persons and contact details.

- Three (3) written, signed, and verifiable letters of reference not older than 3 years where work and or services of similar nature were undertaken.
  <u>NOTE:</u> JET/MERSETA reserves the right to contact any number of the references provided by the bidder.

6.8. Proof of registration on the Central Supplier Database hosted by the National Treasury

6.9. Valid Tax Clearance Certificate

6.10. A certified copy of a valid B-BBEE certificate or affidavit

6.11. Audited Financial Statements for the previous 3 years.

6.12. Bidders to indicate if there will be any subcontracting and clearly indicate what work is to be subcontracted and what percentage (%) of the budget will be sub-contracted.

6.13. In instances of a joint venture/consortium the Joint Venture Certificate must be submitted

NOTE: Failure to comply with submission requirements disqualifies the submission.

7. EVALUATION CRITERIA

7.1. Stage 1: Compliance with minimum requirements

All bidders will be examined to determine compliance with the request for proposal requirements and conditions as stated in section 10. Non-compliant bidders will be eliminated for further evaluation.

7.2. Stage 2: Evaluation of functionality

The evaluation will be conducted by an evaluation panel that will evaluate all proposals independently in terms of the evaluation criteria for functionality which will be made up of 100 points as follows.

FUNCTIONALITY	MAX POINTS
1. Company years of experience in the development of a project of this nature and track record	**20**
Service Provider experience in doing similar jobs: 5 • 8 yrs. and above = 5 • 5 – 7 yrs. = 3 • 3 – 4 yrs. = 1 **Contactable references backed by <u>relevant</u> reference letters for similar work: 15** • Three (3) reference = 15 • Two (2) reference = 10 • Two (1) reference = 5	
2. Methodology / Approach	**20**
• Understanding of the Terms of Reference: 5 • Overall Quality of the Methodology/Approach to accomplish the tasks in accordance with this ToR: 15	
3. Team Composition	**15**
A diverse team with of Blacks, Females, and Youth: 15 • Minimum of one each of Blacks, Females and Youth = 15 • Partially diverse team two of either Blacks, Females or Youth = 10	

FUNCTIONALITY	MAX POINTS
• Partially diverse team one of either Blacks, Females or Youth = 5	
4. Team members' experience	**45**
CVs showing Qualifications for Team Lead: 15 • 8 yrs. plus = 15 • 5 - 7yrs. = 10 • 3 -4 yrs. = 5 • 2 yrs. and below = 2 **CVs showing Qualifications of Project Manager Consulting Experience: 15** • 8 yrs. plus = 15 • 5 – 7 yrs. = 10 • 3 – 4 yrs. = 5 • 2 yrs. and below = 2 **CVs showing Qualifications of Development Team Consulting Experience: 15** • 8 yrs. Plus - 15 • 5 – 7 yrs. plus = 10 • 3 – 4 yrs. = 5 • 2 yrs. and below = 2	
TOTAL FOR FUNCTIONALITY	**100**

All bidders who score less than 65% (which is 65 points) on functionality will not be considered further and will be regarded as having submitted a non-responsive bid and will be disqualified.

8. IMPORTANT DATES

In the interests of efficiency and procedural fairness to all proposers, the following timelines will be strictly adhered to:

Date	Activity
10 June 2022	RFQ advertised and distributed
22 June 2022	Deadline for clarificatory questions from potential bidders
27 June 2022	Bid submission deadline 18h00 via email.
By 15 July 2022	Shortlisted providers may be engaged further to present to the panel on identified questions
By 31 July 2022	Final selection of service provider, with appointment letter sent
1 Aug 2022	Anticipated Inception and start of delivery of services commence

Submission details
- All queries should be directed to Carla Pereira and must be submitted via email to carla@jet.org.za. Responses will be provided via email.
- Proposals should be submitted to tenders@jet.org.za.