



**merSETA**

MANUFACTURING, ENGINEERING  
AND RELATED SERVICES SETA



**JET EDUCATION SERVICES**  
**THINK EDUCATION. THINK JET.**

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REQUEST FOR PROPOSALS:  
**APPOINTMENT OF SERVICE PROVIDER TO  
PROVIDE BUSINESS PROCESS OPTIMISATION  
SERVICES**

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## 1. ACRONYMS

<b>ICT</b>	Information, Communication and Technology
<b>AD</b>	Active Directory
<b>SOD</b>	Segregation of Duties
<b>RMS</b>	Record Management System
<b>NARS</b>	National Archives and Records Services
<b>PDF</b>	Portable Document Format
<b>merSETA</b>	Manufacturing Engineering and Related Services Sector Education and Training Authority
<b>B-BBEE</b>	Broad-based Black Economic Empowerment
<b>FTP</b>	File Transfer Protocol
<b>CIPC</b>	Companies and Intellectual Property Commission
<b>EDRMS</b>	Electronic Document and Records Management System
<b>ToR</b>	Terms of Reference
<b>QMS</b>	Quality Management Systems
<b>SQL</b>	Structured Query Language
<b>POPI</b>	Protection of Personal Information Act
<b>BPMN</b>	

## 2. BACKGROUND

JET Education Services (JET)<sup>1</sup>, in collaboration with the Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA)<sup>2</sup>, 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 synchronized, 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:

- Business Process Optimisation
- Information & Records Management
- Data Management
- Knowledge Management
- Enterprise Architecture
- 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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<sup>1</sup> 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.

<sup>2</sup> 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.

This Terms of Reference (ToR) is in relation to the Business Process Optimisation Workstream of the project.

### **3. PURPOSE OF THIS RFP**

To source a service provider to perform Business Process Optimisation, i.e., the redesign of merSETA's core processes to promote efficiency and strengthen the alignment of individual processes with the organisation's overall strategy and goals.

### **4. BUSINESS PROCESS MANAGEMENT AT MERSETA**

To achieve the merSETA mission "to increase access to high quality and relevant skills development and training opportunities to reduce inequalities and unemployment and to promote employability and participation in the economy", the organisation requires access to current relevant information (both internal and external) and efficient and effective business processes, and it needs to be pro-active in enabling the use of technology tools to enhance internal and external communication and interaction with its stakeholders, partners, and regulators.

Data, information, and knowledge resources are strategic assets for strengthening strategic planning, strategic decision-making, governance, and operational efficiency, as well as solidifying interaction with external stakeholders and partners. The merSETA identified an Enterprise Content Management (ECM) strategy [now referred to as the merSETA Digital Ecosystem] as critical in harnessing and streamlining all its data, information, and knowledge resources and practices to achieve organisational goals.

#### *Current State*

The merSETA is 9000:2015 certified and has a comprehensive Quality Management System that documents Policies, Procedures, Forms, and Templates for each business unit. However, the organisation is still struggling with stakeholder satisfaction due to long turnaround times that are sometimes beyond the legally prescribed limits.

The organisation has a desire to digitally transform its business processes, including digitization of the value chain involving workflow, document management, filing, and archiving. The list of business functions of the organisation in all its seven offices is as follows:

- Strategy and Research
- Operations
- Corporate Services
- Finance
- Company Secretary and Compliance Officer

The workflow of Business Process Optimisation cuts across the entire value chain. The function of information and records management, which will overlook the system and its processes, resides in the ICT function.

### **5. OBJECTIVE OF THE ASSIGNMENT**

The specific objective of this assignment is to ensure that the business processes are optimised, the quality of processes is improved, internal efficiencies are realised, and stakeholder satisfaction is increased.

### **6. PROJECT/ CONTRACT PERIOD**

It is expected that the merSETA will award the successful service provider a 12-month contract.

## 7. SCOPE OF THE PROJECT

The successful bidder will be required to utilise the initial work for the identification of processes that we completed in the analysis phase. The focus of this phase is to determine the need for optimisation and optimise the selected processes.

The merSETA identified 25 processes (with sub-processes) that will have to be classified and optimised where required. The table below lays out each process.

<b>Business Division</b>	<b>Number of Identified Business Processes</b>
Operations	8
Finance	6
Strategy & Research	7
Company Secretary	1
Corporate Services	3
<b>Total</b>	<b>25</b>

The organisation requires the following:

- 7.1. merSETA specific business process standards based on best practice, open standards, and methodologies.
- 7.2. Business process design/re-design using relevant methodologies/approaches to elicit business process requirements.
- 7.3. Documentation and presentation of new business process designs that are relevant to business divisions and units.
- 7.4. Educating business units and users responsible for managing and operating business processes.
- 7.5. Establishment of metrics for monitoring and measuring the impact/effectiveness of business process design/re-design.

## 8. TECHNICAL REQUIREMENTS

- 8.1. **Certifications:** The service provider shall provide evidence that they comply with global standards. The key resources must hold qualifications or certifications that are globally recognised in:
  - 8.1.1 Project Management, e.g. Prince 2
  - 8.1.2 Business Process Modelling and Analysis, e.g. BPMN Certification
  - 8.1.3 Recognized Business Analysis Certification, e.g. Certified Business Analysis Professional
  - 8.1.4 An ISO 0244:2010 certification would be advantageous.

## 9. DELIVERABLES/OUTPUT

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

- 9.1. Inception report detailing the programme of work to be assessed and implemented against this ToR.
- 9.2. A Project Charter with a detailed project plan developed indicating all the timeframes for deliverables.

- 9.3. A Business Process Management framework to guide BPO capability.
- 9.4. Gap Analysis Report detailing gaps in the current state of processes versus the desired future state
- 9.5. Business Process design/redesign guided by the framework developed and identified gaps to be addressed.
- 9.6. Management and staff that are trained in business process management responsibilities and the use of digital tools for business process management.

## 10. SUBMISSION REQUIREMENTS

- 10.2. Bidder must have three (3) years of experience in leading and providing business process design/ re-design. Failure to meet this requirement will result in disqualification.
- 10.3. A technical proposal per scope outlined in this ToR, which clearly outlines how this assignment will be carried out. This includes a high-level project plan clearly indicating milestones 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.
- 10.4. Any additional service offering relevant to the scope of work.
- 10.5. An organogram of the project structure that clearly positions the various members of the proposed team and 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.
- 10.6. A 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 the contract, date of the 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.  
NOTE: JET/MERSETA reserves the right to contact any number of the references provided by the bidder.
- 10.7. Proof of registration on the Central Supplier Database hosted by the National Treasury
- 10.8. Valid Tax Clearance Certificate
- 10.9. A certified copy of a valid B-BBEE certificate or affidavit
- 10.10. Audited Financial Statements for the previous 3 years.
- 10.11. 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 subcontracted.
- 10.12. In instances of a joint venture /consortium, the Joint Venture Certificate must be submitted

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

## 11. EVALUATION CRITERIA

### 11.1. 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.

### 11.2. 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 80 points as follows.

Functionality	Max Points
<b>1. Company years of experience in the provision of Business Process Optimisation services and track record</b>	<b>20</b>
Service Provider Experience in doing similar jobs: 5 <ul style="list-style-type: none"> <li>• 8 yrs. and above = 5</li> <li>• 5 – 7 yrs. = 3</li> <li>• 3 – 4 yrs. = 1</li> </ul> Contactable references backed by <b>relevant Reference Letters</b> : 15 <ul style="list-style-type: none"> <li>• Three (3) reference = 15</li> <li>• Two (2) reference = 10</li> <li>• Two (1) reference = 5</li> </ul>	
<b>2. Methodology / Approach</b>	<b>20</b>
<ul style="list-style-type: none"> <li>• Understanding of the Terms of Reference: 5</li> <li>• Overall Quality of the Methodology/Approach to accomplish the tasks in accordance with this ToR: 20</li> </ul>	
<b>3. Team Composition</b>	<b>15</b>
A diverse team with of Blacks, Females, and Youth <ul style="list-style-type: none"> <li>• Minimum of one each of Blacks, Females and Youth = 15</li> </ul>	
<ul style="list-style-type: none"> <li>• Partially diverse team two of either Blacks, Females or Youth = 10</li> <li>• Partially diverse team one of either Blacks, Females or Youth = 5</li> </ul>	
<b>4. Team members experience</b>	<b>45</b>
An organogram and CV showing Qualifications of Project Director/Team Lead in Business Process Analysis Certification/qualification: 15 <ul style="list-style-type: none"> <li>• +8 yrs = 15</li> <li>• 5 - 7yrs. =10</li> <li>• 3 -4 yrs. = 5</li> <li>• 2 yrs. and below - 2</li> </ul> An organogram and CV showing Qualifications of Project Manager Consulting Experience: 15 <ul style="list-style-type: none"> <li>• +8 yrs. = 15</li> <li>• 5 – 7 yrs. = 10</li> <li>• 3 – 4 yrs. = 5</li> <li>• 2 yrs. and below = 2</li> </ul> An organogram and CV showing Qualifications of Business Analysis Lead Consulting Experience: 15 <ul style="list-style-type: none"> <li>• +8 yrs. = 15</li> <li>• 5 – 7 yrs. plus = 10</li> <li>• 3 – 4 yrs. = 5</li> <li>• 2 yrs. and below = 2</li> </ul>	
<b>TOTAL FOR FUNCTIONALITY</b>	<b>100</b>

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.

## 12. IMPORTANT DATES

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

Date	Activity
22 April '22	RFQ advertised and distributed
29 April '22	Deadline for clarificatory questions from potential bidders
18 May '22	Bid submission deadline 18h00 via email.
By 27 May '22	Shortlisted providers invited to present to a panel on identified questions
By 31 May '22	Final selection of service provider, with notification of award
Jun '22	Anticipated Inception and the start of delivery of services commences

### Submission details

- All queries should be directed to Carla Pereira and must be submitted via email to [carla@jet.org.za](mailto:carla@jet.org.za). Responses will be provided via email.
- Proposals should be submitted to [tenders@jet.org.za](mailto:tenders@jet.org.za).