

## **ANNEXURE A**

### **1. Terms of Reference**

#### 1.1. BACKGROUND.

1.1.1. The Independent Communications Authority of South Africa ("ICASA") endeavours to embed best practice, policies and procedures in its administration and management of operations. For the organization to account and be able to carry out its mandate effectively and efficiently, an Enterprise Project management System to coordinate project planning, implementation, monitoring and evaluation to streamline organisational performance; and produce performance reports to the relevant stakeholders as required was implemented. The installed system is based on Microsoft Project Server Enterprise 2016 and configured to ICASA's specifications and requirements for the management of the authority's projects. The configuration is divided into the following areas:

- 1.1.1.1. The Enterprise Global (The Enterprise Global Template provides a set of custom configuration settings, based on the enterprise requirements. These settings are used to define the standards for tasks, resources, and projects that will be used by all Microsoft Project users)
- 1.1.1.2. The Enterprise Resource Pool (Project Server allows for all enterprise resources to be saved into one location, called the Global Enterprise Resource Pool)
- 1.1.1.3. The SharePoint Central Administration (Project Web App settings that are available in SharePoint Central Administration are different from the Project Web App settings that are available in Project Server 2016).
- 1.1.1.4. EPM 2016 Server (Project Web App (PWA) 2016 provides a rich Web-based client that is designed for users such as executives, program or portfolio managers, project managers, resource managers, viewers, and team members. These users access project information in PWA

2016 by using Microsoft Internet Explorer. PWA 2016 provides access to information of timesheets, projects, resources, status reports, documents, risks and issues)

- 1.1.2. The current farm topology for the existing Project Server 2016 implementation is Hyper-V hosted, on the cluster of 8 nodes, Windows Server 2012 R2 Standard, SQL Server 2016 Standard with about 80 users consisting project managers, team members and executives. The system has been customized to ICASA requirements.
- 1.1.3. The ICASA Project Management Framework is based on PMBOK latest edition and SDLC as well as Agile Methodology for IT projects. The following are current and required functionalities among others;
  - 1.1.3.1. ICASA Look and feel
  - 1.1.3.2. Mapping Business Processes to System Functionality
  - 1.1.3.3. Easy user interface and Navigation
  - 1.1.3.4. Portfolio Management
  - 1.1.3.5. Program Management
  - 1.1.3.6. Resource Management
  - 1.1.3.7. Schedule Management
  - 1.1.3.8. Demand Management
  - 1.1.3.9. Financial Management, Budgeting and expenditure tracking
  - 1.1.3.10. Team Collaboration
  - 1.1.3.11. Business Intelligence
  - 1.1.3.12. Task management
  - 1.1.3.13. Issues and risk management
  - 1.1.3.14. Reminders if projects are past deadline, automated alerts
  - 1.1.3.15. Reporting (including high level dashboards)
  - 1.1.3.16. Archiving and version Control of documents
  - 1.1.3.17. Capability to interface with other enterprise systems, Data Importation as well as an export function
  - 1.1.3.18. Customisable system, ICASA should be able to do additional customisation
  - 1.1.3.19. Scalability

- 1.1.3.20. Different Security and Access levels Configurations to different users in compliance with ICASA's Delegation of Authority Framework
  - 1.1.3.21. Workflows
  - 1.1.3.22. Project Documentation Workflow: This is to enable automated project documentation management from project team members to Project Managers to PMO, M&E and then to Executive Committees and Council.
  - 1.1.3.23. PMO/M&E/IT office: Equipping the PMO/M&E/IT with required tools and templates for the efficient running of the system
  - 1.1.3.24. Customized Deployment: To cater for unique needs especially for reporting to Government as according to the National Treasury Framework for Strategic Plans and APPs as well as the National Treasury Framework for Managing Programme Performance Information
  - 1.1.3.25. Any other functionality based on assessment of the ICASA requirements
- 1.2. SCOPE OF WORK: ICASA seeks to appoint a Service provider that will assist it with the following;
- 1.2.1. System Support and Maintenance:
    - 1.2.1.1. Service provider to indicate and specify requirement for System Maintenance and any other support required to operate the system
    - 1.2.1.2. Service providers are requested to provide a draft SLA indicating 40 hours of support per month and in addition indicate pricing for other options for different number of after implementation support hours covered per month including the following options, (i) 20hours, (ii) 30 hours. If hours / days are not used within the month allocated (for example for development of new features), they will roll over into the following month. The assignment will be managed by the Projects Office team. All options and recommendations for improving the Enterprise Project

Management system will be agreed through the team, which will directly collaborate with the service provider.

1.2.2. System Deployment:

- 1.2.2.1. Migration of the current Enterprise Project Management System to Online with functionality as listed in Section 1.1.3; It is anticipated that this migration will take place end of Year 1 to beginning of Year 2 of the Contract.
  - 1.2.2.2. Carry out a situational analysis of ICASA's systems and processes in order to get a full understanding of the status quo before commencement with the new design of an online system.
  - 1.2.2.3. For the migration, Service provider to provide estimated timelines and proposed implementation plan and specify deliverables at each stage
  - 1.2.2.4. The solution provider should recommend in detail all required hardware, software and network IT infrastructure required for their enterprise solution to be commissioned.
  - 1.2.2.5. For the migration, solution provider is to specify support provided during the changeover process from the old system to the new system, minimising downtime.
- 1.2.3. Review of the design and configuration of ICASA's project management framework and processes, to be optimised in alignment with ICASA's business strategy, all this implemented into the enterprise project management system
- 1.2.4. TRAINING: The service provider should ensure knowledge and skills transfer that will enhance the institutional knowledge and usage of the system. Training, Mentoring and Capacity Building to enable ICASA to independently run the system once it has been deployed is required; The service provider must actively involve ICASA staff to ensure maximum knowledge transfer. The trained members should be equipped to train other staff members. Please note that ICASA staff have differing levels of IT competency. Training on tools and processes as well as reports customization should be included for relevant groups. The supplier must also provide a training cost breakdown per group or per individual specifying maximum number

in a group and also specify any prerequisites. In addition, service provider, to specify the content for each level of training and duration. Annual face to face training is required for the following user groups -:

- 1.2.4.1. PMO (2)
- 1.2.4.2. Project Leaders/Managers (20)
- 1.2.4.3. Project Team Members(20)
- 1.2.4.4. Executives (16)
- 1.2.4.5. Systems Administrators (2) ;

1.2.5. TECHNICAL AND FUNCTIONAL DOCUMENTATION: System, installation, technical, training, and procedure documentation and user manuals should be supplied.

1.3. METHODOLOGY: Potential service providers are expected to give a detailed methodology on how they will carry out the project. They must also provide estimated timelines and proposed implementation plan and specify deliverables at each stage. The total expected duration of the project is three years made up of the migration period (time required for migration should be specified by service provider. The exact timing for the migration is dependent on ICASA approval of its cloud strategy. Billing for the migration will only be processed upon successful migration of the system) and support and maintenance services provided monthly

1.4. FUNCTIONALITY: PRE-QUALIFICATION CRITERIA: Only bidders who are meet the mandatory requirements, meet the cut-off score of 80 points out of 100 points for functionality (1.6 to 1.11) will be considered further for price evaluation. All bid proposals submitted will be evaluated in accordance with the 80/20 procurement principle as prescribed by National Treasury Regulations. Bids will be evaluated for in line with the following criteria:

## **1.5. MANDATORY REQUIREMENTS**

#	Requirement
1	<b>Microsoft Gold Partner (Submit proof of valid accreditation)</b>
Comment:	
2	<b>Provide options for service level agreement (SLA) hours over the 3-year period for the support of the system (40/20/30 hours)</b>
Comment:	
3	<b>At least one team member working on the project is a certified project management professional (Submit Proof)</b>
Comment:	

## 1.6. FUNCTIONAL REQUIREMENTS

The service provider will be required to provide a solution that satisfies following requirements and meets the current and future functionality as specified:

\*All requirements should be addressed in proposal

#	Requirements
1	<b>System that provides for ICASA Look and feel</b>

Comply	Yes	No
Please explain how this requirement is met:		
<b>2</b>	<b>Ease of navigation of system and user interface</b>	
Comply	Yes	No
Please explain how this requirement is met:		
<b>3</b>	<b>Mapping of ICASA Business Processes to System Functionality</b>	
Comply	Yes	No
Please explain how this requirement is met:		
<b>4</b>	<b>Management of the following;</b>	
	<ul style="list-style-type: none"> <li><b>a. Portfolio Management</b></li> <li><b>b. Program Management</b></li> <li><b>c. Resource Management</b></li> <li><b>d. Schedule Management</b></li> <li><b>e. Demand Management</b></li> <li><b>f. Task Management</b></li> <li><b>g. Issue and Risk management</b></li> <li><b>h. Automated alerts</b></li> <li><b>i. Team collaboration</b></li> <li><b>j. Archiving and Version Control of documents</b></li> </ul>	

Comply	Yes	No
Please explain how this requirement is met:		
<b>5</b>	<b>Financial Management, Budgeting and expenditure tracking.</b>	
Comply	Yes	No
Please explain how this requirement is met:		
<b>6</b>	<b>Business Intelligence and Reporting (including high level dashboards for different user groups)</b>	
Comply	Yes	No
Please explain how this requirement is met:		
<b>7</b>	<b>Scalable and Customisable system (ICASA should be able to do additional customisation)</b>	
Comply	Yes	No
Please explain how this requirement is met:		



<b>8</b>	<b>The solution provider must provide different access rights to different users as required, in compliance with ICASA’s Delegation of Authority Framework, therefore Security and Access levels Configurations are required</b>		
Comply		Yes	No
Please explain how this requirement is met:			
<b>9. Workflows: Incorporation of workflows including Project Documentation Workflow</b>			
Comply		Yes	No
Please explain how this requirement is met:			
<b>10. Equipping users with Tools and Templates for the efficient running of the system</b>			
Comply		Yes	No
Please explain how this requirement is met:			

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**1.7. PROJECTS OF A SIMILAR NATURE AND PROVEN TRACK RECORD**

The service provider will be required to provide information on experience

\*All requirements should be addressed in proposal

<b>#</b>	<b>Requirements</b>
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<b>1</b>	At least 5 years' experience in implementation of Enterprise Project Management Systems (both server based and online) with at least 3 references submitted				
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; text-align: center;">Comply</td> <td style="width: 33%; text-align: center;">Yes</td> <td style="width: 33%; text-align: center;">No</td> </tr> </table>			Comply	Yes	No
Comply	Yes	No			
Please explain how this requirement is met:					

**1.8. EXPERIENCE OF TECHNICAL AND FUNCTIONAL TEAM MEMBERS**

The service provider will be required to provide information of qualification and experience of team

\*All requirements should be addressed in proposal

#	Requirements			
<b>1</b>	A team with solid understanding and experience in implementation			
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Comply	Yes	No		
Please explain how this requirement is met:				

**1.9. KNOWLEDGE OF RELEVANT LEGISLATION AND FRAMEWORKS**

The service provider will be required to provide information on knowledge of legislation and frameworks

\*All requirements should be addressed in proposal

#	Requirements
<b>1</b>	Understand government systems and processes, ICASA as a Chapter 9 institution, is expected to comply with government, treasury and other

<p>regulations in terms of reporting and other requirements. The system developed should enable ICASA to operate within these requirements.</p> <p>Knowledge of the following is required;</p> <ol style="list-style-type: none"> <li>1. National Strategic framework for Strategic Plans and APPs (August 2010)</li> <li>2. National Treasury Framework for Managing Programme Performance Information (May, 2007)</li> <li>3. Department of Monitoring and Evaluation (DPME) Policy Framework for government wide Monitoring and Evaluation System (Nov, 2007)</li> <li>4. DPME Evaluations Framework (Nov, 2011)</li> <li>5. Public Service Act (DPMS)</li> <li>6. Public Finance Management Act of 2009</li> <li>7. PPPFA</li> <li>8. ICASA Act, 13 of 2000 as amended</li> <li>9. Electronic Communications Act, 36 of 2005</li> <li>10. Broadcasting Act, 4 of 1999</li> <li>11. Postal Services Act, 124 of 1998</li> <li>12. Project Management International Best Practice.</li> </ol>											
<table border="1" style="width: 100%;"> <tr> <td style="width: 33%;">Comply</td> <td style="width: 33%;">Yes</td> <td style="width: 33%;">No</td> </tr> <tr> <td colspan="3">Please explain how this requirement is met:</td> </tr> <tr> <td colspan="3" style="height: 100px;"></td> </tr> </table>			Comply	Yes	No	Please explain how this requirement is met:					
Comply	Yes	No									
Please explain how this requirement is met:											

**1.10. APPROACH, METHODOLOGY AND PROCESS**

The service provider will be required to provide information on approach, methodology and process to be utilised in the project

\*All requirements should be addressed in the proposal

#	Requirements						
1	Provide a detailed approach, methodology and process to meet the organisation's requirements						
<table border="1"> <thead> <tr> <th>Comply</th> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td colspan="3">Please explain how this requirement is met:</td> </tr> </tbody> </table>		Comply	Yes	No	Please explain how this requirement is met:		
Comply	Yes	No					
Please explain how this requirement is met:							

**1.11. LOCAL HELPDESK & SUPPORT STRUCTURE INFORMATION**

The service provider will be required to provide information on Local helpdesk & support structure available for the support and maintenance

\*All requirements should be addressed in proposal

#	Requirements						
1	Service provider has a Local helpdesk and support centre.						
<table border="1"> <thead> <tr> <th>Comply</th> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td colspan="3">Please explain how this requirement is met:</td> </tr> </tbody> </table>		Comply	Yes	No	Please explain how this requirement is met:		
Comply	Yes	No					
Please explain how this requirement is met:							

