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# INSTITUTIONAL PERFORMANCE AND GOVERNANCE MONITORING AND EVALUATION INFORMATION MANAGEMENT SYSTEM

## TERMS OF REFERENCE (ToR)

*"One nation many languages"*

## Table of Contents

1. Acronyms .....	2
2. Background PanSALB.....	2
3. Introduction .....	3
4. Objectives of the Service Provider.....	3
5. The key functional areas proposed to be developed and implemented in the M&E IMS include:.....	4
6. Scope of the work .....	4
7. Deliverables .....	5
7.1. System maintenance.....	5
7.2. Reporting .....	5
7.3. Support .....	5
7.4. Training.....	6

### 1. Acronyms

SMART	Specific Measurable, attainable, realistic, and time-bound
PanSALB	Pan South Africa Language Board
ToRs	Terms of Reference
M&E	Monitoring and Evaluation
M&E IMS	Monitoring and Evaluation Information Management System
IPG	Institutional Performance and Governance
IT	Information Technology

### 2. Background PanSALB

The PanSALB mandate is derived primarily from the Constitution of the Republic of South Africa ('the Constitution') and the PanSALB Act; other aspects are derived from additional legislation, policies, directives, and prescripts. Sections 6 (5) (a) and (b) of the Constitution of the Republic of South Africa (Act No. 108 of 1996) provide for the establishment of a Pan South African Language Board as follows:

The Pan South African Language Board established by national legislation must:

- promote and create conditions for the development and use of all the official South African languages.
- the Khoi, Nama, and San languages
- the South African Sign Language (SASL)
- promote and ensure respect for all languages commonly used by communities in South Africa, including.
- German, Greek, Gujarati, Hindi, Portuguese, Tamil, Telegu and Urdu
- Arabic, Hebrew, Sanskrit, and other languages used for religious purposes in South Africa

Section 181 of the Constitution states the following about the rights of constitutional entities:

- These institutions are independent and subject only to the Constitution and the law; they must be impartial, exercise their powers and perform their functions without fear, favour, or prejudice.
- Other organs of state, through legislative and other measures, must assist and protect these institutions to ensure the independence, impartiality, dignity, and effectiveness of these institutions.
- No person or organ of state may interfere with the functioning of these institutions.

### **3. Introduction**

PanSALB have developed a Monitoring & Evaluation (M&E) Framework to guide in planning, tracking, monitoring, reporting, analysis and evaluation of project and programme activities, outputs, outcomes, and impacts that contribute to the overall PanSALB Strategic plan. The entity desires to have a web-based Monitoring & Evaluation Information Management System (M&E IMS) to enhance result-based reporting at all Programmes. The M&E IMS will enhance the entity reporting process and reduce burden of reporting which might occur.

- a. Proposed name of IPG reporting System: ***IPG Monitoring and Evaluation Information Management System.***

### **4. Objectives of the Service Provider**

The objective is to have a developed an implementable M&E IMS for results reporting and information management at both the head office and provincial offices. The developed M&E IMS system is expected to:

- a) Capture all programme activities, Impact statements, output indicators, targets and achievements made, or monthly and quarterly progress reported.
- b) Track activities implemented and report on outputs achieved by division.
- c) Report on progress towards achieving the PanSALB Strategic Objectives
- d) The system should be able to generate summary report, (e.g., narrative report, with graphs).
- e) The system needs to make provision for uploading of portfolio of evidence (POE).
- f) Where targets are not achieved the system should automatically open a column to furnish reasons of deviation and corrective measures.
- g) The system should also be benchmarked against best practice in Management Information Systems
- h) Once administrator captured the annual and quarterly targets, the system should be able to lock the (Annual target, Quarterly targets, objectives, indicators, and outcome)
- i) The System should be able to send out notification to respective managers two weeks before the quarter ends.

- j) The system should be able to send out reminders to relevant managers.
- k) Able to notify respective managers when is open for reporting.

**5. The key functional areas proposed to be developed and implemented in the M&E reporting system include:**

- a) A dynamic setup module that captures 'SMART' indicators at all logical framework levels – activity, output, and outcomes.
- b) Capture activities and report on outputs at head office and provincial office levels across organizational division/ business units.
- c) Have a planning module for capturing annual targets of each indicator.
- d) Have a reporting module for tracking monthly, quarterly, or annual implementation progress for each indicator.
- e) Able to track both quantitative and qualitative data.
- f) Able to capture risk activities and progress thereof.
- g) The system must be able to generate the report which consist of executive summary and graphs which illustrate performance of different divisions and that of the institution.
- h) Information on pre-determined objectives (PDOs) from the Approved Annual Performance Plan must be configured into an M&E reporting system.
- i) The system must be able to send reminders out regularly and automatically indicating time remaining to report and upload portfolio of evidence.

**6. Scope of the work**

The appointed service provider while undertaking this exercise will be required to fulfil the following activities.

- a) Define, establish, and document full understanding of the scope of work. This shall entail details of the stakeholders involved, the definition of problem domain and the solution: a description of the system to be implemented and the high-level system requirements.
- b) To undertake system design, customization, and testing against the requirements.
- c) The technical glitches should be resolved within four to eight hours.
- d) To provide user training.
- e) Deploy the system at both the Head Office and provincial offices.
- f) Upon operationalisation, evaluate the system in terms of performance, usability, and accessibility.
- g) Provide 36 months (3 years) maintenance system support.

## **7. Deliverables**

The work is expected to commence immediately after the signing of the contract. The Service provider will be expected to submit the following:

- a) An Inception report highlighting system approach, workplan, design specifications and desk review findings.
- b) An Interim Report after the development and training of the M&E IMS systems
- c) An Implementation report and full rollout of the M&E IMS.
- d) A final detail post implementation review report.

The Service provider is further required to provide the following:

### **7.1. System maintenance**

The service provider will be expected to provide maintenance and support for the period of 36 months. The system must be maintained in a way that is always abreast with the latest technology trends. Among other things the service provider will be expected to:

- a) Develop the system to the latest version and/or develop a performance management system.
- b) Develop the portal to https.
- c) Implement a high availability server.
- d) Update and implement the disaster recovery procedure.

### **7.2. Reporting**

The service provider must develop and configure system analytics that sees, inter alia:

- a) Automated statistics of users that logon the system within a specific date range.
- b) Statistics of user and stakeholder reporting (date submitted, total of submitted reports and outstanding reports); and
- c) Identify PanSALB reporting requirements and configure the system.

### **7.3. Support**

- a) Continuous support during the duration of the contract.
- b) First and second level server and user support.
- c) Adaptive to cope with changes in software environment.
- d) Corrective fix any errors/bugs identified.

- e) Preventive to increase maintainability in the future.
- f) The system must run/be available 24/7.
- g) Corrective, adaptive, and perfective maintenance.
- h) Ad-hoc reporting as and when required.

#### **7.4. Training**

- a) The service provider must train all PanSALB users and provide ongoing training for the duration of the contract.
- b) The service provider must train all provincial managers in their respective provinces. (Preferable first training to be onsite and second training can be provided online)
- c) Must offer training for administrators (a train the trainer type of course).
- d) Must offer technical training to IT technicians.
- e) Must offer training onsite and online.
- f) User friendly training material/manuals must be provided for participants during training.
- g) Training material must be available in electronic format.
- h) Create customized e-learning platform; and
- i) Training must be customized for PanSALB implementation.

#### **7.5. Mandatory Requirements**

- (a) Bidders must ensure that the following submission requirements are included in their bids. Failure to submit any of the below submission requirements shall render the bid invalid and lead to disqualification.
  - i. Duly completed and signed Standard Bidding Documents (SBD 4, and 6.1).
  - ii. Central Supplier Database (CSD) number/report.
  - iii. SARS Pin

#### **7.6. Evaluation Criteria**

- a) PanSALB has set minimum standards that bidders must meet to be selected as successful bidder.

#### **7.7. Technical Evaluation Criteria**

- (a) The technical evaluation of the bid will be based on the presentation of the demo system for bidders who comply with paragraph 7.5 above.
- (b) SCM will advise all shortlisted bidders on what to prepare and present to the committee.