



TERMS OF REFERENCE

Business Case development services for the establishment of a National Digital Ecosystem for Post-School Education and Training

BACKGROUND

JET Education Services (JET), in collaboration with the Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA), have initiated a project that seeks to address the development of an integrated national digital ecosystem which is interoperable and can be used for effective skills planning and provisioning. The project is titled *Post School Education and Training Collaboration and Learning Opportunities and Utilisation of Data (PSET CLOUD)*.

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.

Phase 1 of the project has been completed and involved a situational analysis of the PSET sector, a mapping study and a feasibility report. A condensed and integrated version of the reports will be released in early 2020, and will also be made available to shortlisted service providers. An international review has also been completed – this report is available in the public domain and can be accessed at www.jet.org.za/resources/interoperable-data-ecosystems.pdf/view.

Phase 2 of the project commenced in 2020 with the appointment of a service provider to design, cost and present the stakeholder engagement and scenario

planning approach to be utilised in the project. This includes the implementation of stakeholder engagement and scenario planning. The service provider will be appointed in April 2020, and will work in tandem with the service provider appointed for the tasks specified in this TOR.

The purpose of this Terms of Reference is to invite credible independent service providers to submit proposals to develop a business case and an implementation plan for the establishment of the PSET CLOUD and its governance and, or institutional mechanisms.

SCOPE OF WORK

This Terms of Reference calls for a focus on the following deliverables:

1. Develop an inception report with a clear methodology and a workplan for the development of the business case and implementation plan.
2. Undertake relevant research and gather information as required for the completion of the business case and implementation plan.
3. Develop a business case based on the following guiding structure:
 - a. A background and situation analysis that discusses amongst others; the rationale for and value add of the establishment of the interoperable national digital eco-system for post school education and training, PSET CLOUD.
 - b. A summary of relevant international experience and best practice in the establishment and operations of similar mechanisms.
 - c. A complete feasibility assessment covering but not limited to technical, strategic, policy and legislation and other aspects of the feasibility of establishing the PSET CLOUD.
 - d. Recommended specifications for a Minimum Viable Product.
 - e. An analysis of different possible institutional form options available for the establishment of the PSET CLOUD. This analysis should be informed by key clearly identified design principles for the efficient and effective functioning of the CLOUD, highlight the pros and cons of each form, and make recommendations on the institutional form that should be adopted.

- f. Risk analysis with respect to the establishment of an interoperable ecosystem and the institutional form options.
 - g. A high-level strategy for the PSET CLOUD which should include indicative statements of a vision and mission, outcomes, functions and outputs.
 - h. Governance arrangements for the PSET CLOUD (i.e. board, management, committee advisory groups, stakeholder representation etc.)
 - i. Accountability/reporting systems (reporting arrangements, alignment with existing structures/units).
 - j. A recommended detailed service delivery model.
 - k. A proposed funding model for the PSET CLOUD.
 - l. Budget projections including an establishment budget and a three-year projected operational budget
 - m. An implementation plan with tasks, responsibilities and time-frames for the establishment of the PSET CLOUD.
4. Submit a business case and implementation plan.

The service provider will be expected to work closely with the team that will be conducting stakeholder engagements towards the establishment of the PSET CLOUD.

SERVICE PROVIDER REQUIREMENTS

The service provider must have the following:

- A proven track record of the necessary knowledge and experience in the development of business cases.
- Strategic governance, management and organisational development expertise and experience.
- Organisational design including the development of agile organisational structures.
- Data governance & management, system design and information technology skills.
- Experience in digital initiatives and information management.

- Expertise and skills in financial modelling and costing.
- The capacity to deliver on the key milestones identified with a relevant project team
- Knowledge and experience of user-centered design thinking and lean innovation approach.
- At least three references of working with government and other stakeholders in relevant initiatives.

The service provider must submit the following:

- A project plan with milestone outputs and review dates indicating the approach and methodology to be used in achieving the project deliverables
- The approach must indicate how the theory of change is integrated into the project using the following integral components:
 - Identifying long-term goals
 - Backwards mapping and connecting the preconditions or requirements necessary to achieve the goal and explaining why these preconditions are necessary and sufficient.
 - Identifying basic assumptions about the context.
 - Identifying the interventions needed to create the desired change
- Detailed CVs of the project team for this project that clearly indicate the key roles or expertise e.g. project manager, strategic management and organisational design etc. A multilevel team approach is preferred to a single consultant
- Only teams that demonstrate well balanced racial and gender compositions will be considered.
- Proposed steps and time frames involved for successful completion
- Detailed cost breakdown for the project, including VAT

The change process (Theory of Change) over the four-year period is indicated in Annexure A and must be used as reference.

Evaluation criteria

Criteria	Weight
Capacity	10%
Mentoring and use of interns	5%
Previous experience	15%
References	10%
B-BBEE	10%
Price	10%
Proposal and Methodology	40%
Total	100%

BUDGET

No stipulated budget allocation is provided in this Terms of Reference.

However, the proposal must include a total costing which includes the level of effort not exceeding 60 person days in total for the entire team over a period of five (5) months from signing of the contract.

ESTIMATED TIMEFRAMES

Deadline for clarification questions is: 20 March 2020

Deadline for submission of proposals is: 30 March 2020

Evaluation of submissions will take place by: 10 April 2020

All short-listed service providers will be requested to be available to make presentations on 15 and 16 April 2020

This project to commence on 4 May 2020

Completion date: 31 December 2020.

An additional month will be allowed for final report submission.

Contact details

All queries should be directed to Boitumelo Manci and must be submitted via email to boitumelo@jet.org.za. Responses will be provided via email.

Proposals should be submitted to tenders@jet.org.za. Technical and financial proposals may be combined.

ANNEXURE A

