APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF THE DIGITAL STRATEGY TO GUIDE THE DIGITAL TRANSFORMATION OF CIDB SERVICES

VOLUME 3 OF 4: TERMS OF REFERENCE
### TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>CONTENTS</th>
<th>PAGE NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Client / employers objectives</td>
<td>3</td>
</tr>
<tr>
<td>2. Project objectives</td>
<td>3</td>
</tr>
<tr>
<td>3. Description of services</td>
<td>4</td>
</tr>
<tr>
<td>4. Evaluation approach</td>
<td>6</td>
</tr>
<tr>
<td>5. Approvals</td>
<td>9</td>
</tr>
<tr>
<td>6. Access to land / buildings / sites</td>
<td>9</td>
</tr>
<tr>
<td>7. Planning and programming</td>
<td>9</td>
</tr>
<tr>
<td>8. Key personnel</td>
<td>9</td>
</tr>
</tbody>
</table>
1. CLIENT’S / EMPLOYER’S OBJECTIVES

The Construction Industry Development Board (cidb) is a Schedule 3A public entity. The Board comprises of private and public sector individuals appointed by the Minister of Public Works on the basis of their individual knowledge and expertise. It is supported by knowledge – based organization that is committed to the development objectives defined in the cidb Act (Act 38 of 2000).

The cidb mandate is to:

➢ Provide strategic leadership to construction industry stakeholders developing effective partnership for growth, reform and improvement of the construction sector;
➢ Promote sustainable growth of the construction industry and the sustainable participation of the emerging sector in the industry;
➢ Promote improved performance and best practice of public and private sector clients, contractor and other participants in the construction delivery process;
➢ Promote procurement and delivery management, the uniform application of policy throughout all spheres of government, uniform and ethical standards including a code of conduct;
➢ Establish the registration of projects and contractors and other suppliers, to systematically regulate and monitor the performance of the industry and its stakeholders for sustainable growth, delivery and empowerment and for improved performance and capability;
➢ The cidb’s operational structure is summarized below. Note that while the individual Business units are presented here, the cidb operates in an integrated and cross-cutting manner.

The cidb has the following Business units:

➢ Office of the CEO
➢ Finance
➢ Information Technology
➢ Functional Operations
➢ Corporate services

2. PROJECT OBJECTIVES

ICT has an approved five-year strategy in alignment with the five-year strategic plan of cidb. In order to guide the digital transformation approach, a digital strategy is required to complement the IT strategy and the digital marketing strategy.

The purpose of this RFQ is to develop a digital strategy to guide the digital transformation of cidb services. This will assist in prioritizing areas of the business that will benefit from digitization. The IT strategy outlines the digital strategy framework, which must then be
developed to address different areas of digital transformation, giving CIDB a clear implementation or modernization roadmap. The digital strategy must address the digital marketing and IT strategic aspect. The digital strategy will then be owned by transformational and business improvement team which is not necessarily IT.

3. DESCRIPTION OF THE SERVICES

The digital strategy should be concise and address the aspects of digital marketing strategy of CIDB in relation to some or all components of the framework below.

### 3.1 Develop the digital strategy to improve the value of strategic assets

The strategy should cover the improvement of the values of CIDB strategic assets through the adoption of digital transformation, such as:

- Brand value
- Organization culture
- Stakeholder network
- Registration products
- Development products
- Regulatory Mandate
3.2 Develop the digital strategy to improve customer experience of CIDB services

➢ Investigate how digital platforms can improve the level of customer service offered to clients, contractors and stakeholders.
➢ Establish the communication needs of clients, contractors and stakeholders.
➢ Determine suitable digital communication platforms.
➢ Explore the possibility for expansion of products and room for revenue growth on legislative mandate and digital offerings. Explore product education and simplification of the current registration products e.g. renewals, upgrades.
➢ Explore provision of self-services for service improvement.
➢ Explore technologies that can be implemented to improve experience, look & feel at customer touch points such as queue reduction, waiting times, etc.
➢ Investigate expansion of touch point using third party collaborations or interfaces with other government service points.
➢ Explore strategies to have integrated points of presence including integrated call centre, social media, chatbots, mobile space, etc.
➢ Explore sources of 3rd party information to reduce handling of paper.
➢ Investigate automation of surveys platforms,

3.3 Develop the digital strategy to improve operational processes

➢ Investigate processes that are due for automation.
➢ Recommend an intelligent automation of jobs that can be performed better by computers to allow workers to do advanced jobs.
➢ Explore work planning, collaborating tools to share information and communicate.
➢ Investigate performance dashboards and analytics to allow the view of the business performance against set targets.
➢ Investigate digital instruments that improves/replace human workflows and interfaces (employee enablement such as cloud tools, SCM, travelling, HR, productivity, couriers, copiers, memo. etc).
➢ Identify the performance tracking, reporting and enforcement using technology.

3.4 Develop the digital strategy to transform the business model

➢ Review the EA roadmap and report on digital transformation progress.
➢ Investigate the services delivery /operational model and how technology can improve business models (decentralised assessment and automation thereof).
➢ Explore digital opportunities for a development centred products as compared to registration products.
➢ Report on opportunities for digitisation not broadly but in terms of quick wins.
➢ Explore the connectedness of state and private sector for third party workflow expansion for value added services such as knowledge platform, SMME training / paperless procurement / subcontracting platforms, purchase order funding, development funding, etc.

3.5 Develop the digital strategy to utilise investment and new infrastructure capabilities

➢ Explore and develop strategies for analytic and customer insight.
➢ Explore strategies for optimal use of investments in cloud documents, knowledge and contents management.
➢ Explore strategies for optimal use of M365 apps.
➢ Investigate cloud investments and Microsoft licensing for aligned investment and reduce any wastage in cloud infrastructure and application investments.
➢ Explore areas of employee digital skilling, IT funding and further investments.
➢ Identify continuous technology skills requirements for the digital transformation.
3.6 Define digital strategy vision, engagement and governance
- Define governance structure and organizational engagement Programme
- Define digital strategy vision for cidb.

4. EVALUATION APPROACH

4.1 The cidb has adopted a three (3) stage approach in assessing, analysing and evaluating Proposals, being:
   4.1.1 First stage: Administrative. / Mandatory Requirements
   4.1.2 Second stage: Functionality
   4.1.3 Third stage: Price and B-BBEE

4.2 First stage: Administrative/Mandatory Requirements
The Bidders must fully comply with the Mandatory requirements and those bidders who fail to comply will be disqualified from the process.

4.3 Second stage: Functionality
   4.3.1 The purpose of application of qualification criteria is to determine the functionality of each proposal by assessing the quality and the robustness thereof.
   4.3.2. Below is a detailed breakdown of the scoring criteria for each individual proposal:

<table>
<thead>
<tr>
<th>Quality criteria</th>
<th>Sub-criteria</th>
<th>Maximum number of points</th>
</tr>
</thead>
<tbody>
<tr>
<td>TENDERER’S EXPERIENCE</td>
<td><strong>Bidder experience in Digital Strategy</strong></td>
<td>30</td>
</tr>
<tr>
<td>Provide the company profile and a list of client references</td>
<td>Briefly describe services in relation to the engagement where the bidder has provided resource(s) team (or an individual) to formulating e-Services Strategy, Digital Strategy or Digital Transformation Strategy. For each case study describe industry, challenges, the deliverables and achievements. Where a bidder uses a consultant, the experience must be in relation to the consultant and must provide the case studies not a CV. CV will be evaluated separately. Points will be allocated on a sliding scale of: One (1) case study = 5 Two (2) case studies = 10 Three (3) case studies = 20 Four plus (4+) case studies = 30 points</td>
<td>45</td>
</tr>
</tbody>
</table>
### Bidder experience in Digital Marketing

Briefly describe services in relation to the engagement where the bidder has provided a resource team (or an individual) to formulate a digital marketing strategy or online marketing strategy.

For each case study describe industry, challenges, the deliverables and achievements.

Points will be allocated as follows:
- One (1) case study = 5
- Two (2) case studies = 10
- Three (3+) case studies = 15

### APPROACH PAPER

#### Methodology with project plan

Provide a methodology for the delivery of the scope of work explaining the teams, schedules and approach to be taken.

Resources must cover the scope of work completely. Milestones must be expressed in hours or working days. Team structure and roles clearly articulated.

The project plan should:
- Addresses the deliverables with clear milestones – 5
- Link milestones with a detailed activity schedule - 5
- Addresses stakeholder communication, performance, administration and governance issues - 10
- List initial/anticipated or assumed risks and their mitigation - 5
- Project duration = 5
  - 1-3 Months = 5
  - 4-6 Months = 3
  - 6+ Months = 1

### KEY PERSONNEL EXPERIENCE

Provide a comprehensive CV and Qualifications

Brief CV of consultant covering experience in similar work.

Only two key CVs will be considered for evaluation purposes.

Maximum of 4 may be included in order of preference.

NB: Information must be consolidated where fragmented to show experience in number of years. Qualifications and proof of other documents must be attached.

Average score of evaluated CVs will be used.

- **Highest qualification of the consultant in IT/Marketing/Business** = 10
  - NQF 9/10 = 10
  - NQF 7/8 = 7
  - NQF levels up to 6 = 5

- **Years of experience in IT strategy formulation or digital marketing or digital transformation consulting** = 12
  - 12+ years in IT or Marketing and 5+ in consulting = 12
  - 8+ years in IT or Marketing and 3+ in consulting = 8
  - 5+ years in IT or Marketing and 1+ consulting = 6
Professional registration, accreditation or certification relating to the digital marketing / IT strategy = 3

| Maximum possible score for quality (Ms) | 100 |

Bidders from the second stage who will have scored 70 points, or more will qualify for the third stage in Price and BBBEE.

4.4 Third Stage: Price and BBBEE

4.4.1 Subsequent to the evaluation of essential minimum Criteria and functional criteria, the third stage of evaluation of the Bids will be in respect of price and preferential procurement only.
4.4.2 Price proposals should be submitted in South African Rand including Value Added Tax (VAT)
4.4.3 The bidder shall provide the price proposal as follows:

PLEASE NOTE: BIDDERS THAT OMIT AN ITEM FROM THE PRICING SCHEDULE CANNOT ADD THE ITEM ONCE THE TENDER HAS BEEN AWARDED.

PRICING PROPOSAL

<table>
<thead>
<tr>
<th>No</th>
<th>Milestone name</th>
<th>Duration / Qty</th>
<th>Amount Exc. VAT</th>
<th>Source of evidence for milestone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Development of the digital strategy to improve the value of strategic assets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Development of the digital strategy to improve customer experience of cidb services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Development of the digital strategy to improve operational processes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Development of the digital strategy to transform the business model</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Development of the digital strategy to utilise investment and new infrastructure capabilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Defining the digital strategy vision, engagement and governance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total bid excluding VAT</strong></td>
<td>R</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>VAT @ 15%</strong></td>
<td>R</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total bid Price including VAT</strong></td>
<td>R</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5. APPROVALS

The final document will be submitted to IT Manager for confirmation and Chief Information Officer for review and approval of deliverables.

6. ACCESS TO LAND / BUILDINGS / SITES

During the fieldwork, the successful bidder shall be provided with access control cards for ease of access to the CIDB buildings. The bidder shall be allocated with an office space for the duration of their fieldwork.

7. PLANNING AND PROGRAMMING

The successful tenderer shall present the project plan with timelines during the project initiation meeting and signoff. The requirement to be submitted and agreed upon.

8. KEY PERSONNEL

A schedule of key personnel / schedule of contact particulars of key personnel should consist of the following:

i. Account Manager;
ii. Project Manager;
iii. Senior Consultant;
iv. Project Assistant / Admin

The CV’s submitted, should be that of the assigned team (as per tender submission) and should there be a change in the initial team submitted, the tenderer must ensure that the team complies with the tender requirements.