

TERMS OF REFERENCE

1. **BACKGROUND TO W&RSETA**

The Wholesale and Retail Sector Education and Training Authority (W&RSETA), established in terms of the Skills Development Act, is mandated to facilitate the skills development needs within the Wholesale and Retail sector. As part of its digital transformation strategy, the organisation has prioritised the modernisation of ICT systems, digital platforms and collaboration tools to ensure secure, reliable and high-performance operations that support business delivery.

SharePoint Online forms a critical component of W&RSETA's collaboration, document management, workflow automation, records compliance and digital workplace enablement. A comprehensive SharePoint Full Optimisation Project is required to improve user experience, strengthen governance and maximise the value of the Microsoft 365 platform.

2. **OBJECTIVE OF THE REQUEST**

The objective of this Terms of Reference is to appoint a qualified SharePoint specialist service provider for a period of three years to deliver the development, optimisation, implementation, continuous improvement and support of W&RSETA's SharePoint Online environment. The appointment will cover development, implementation, support, training, governance and related optimisation services over the contract period.

- Conduct a full assessment of W&RSETA's current SharePoint Online environment.
- Re-architect site structures for improved usability, governance, scalability and searchability.
- Modernise the intranet interface using Microsoft 365 and SharePoint Online best practices.
- Improve document management, metadata, versioning, archiving and compliance controls.
- Implement automated business processes using Power Automate.
- Enhance permissions, security, access control and governance.
- Restructure storage and content to align with the approved institutional File Plan.
- Provide training, handover documentation and post-implementation support to ICT and business users.

The optimisation must align with Microsoft 365 best practices, W&RSETA ICT governance requirements and records management policies.

The successful service provider must provide a phased delivery approach covering initial assessment and design, development and implementation, migration and restructuring, workflow automation, user adoption, handover, and ongoing support over the three-year contract period.

3. DESIGN REFERENCE AND INTRANET EXPERIENCE

The proposed SharePoint Online environment must include a redesigned, modern, visually appealing and user-friendly intranet interface aligned to the W&RSETA intranet design reference. The design must prioritise clear navigation, quick access to business portals, news and communications, podcasts and interviews, employee recognition, announcements, upcoming events, search across sites, documents and people, and a consistent W&RSETA-branded digital workplace experience.

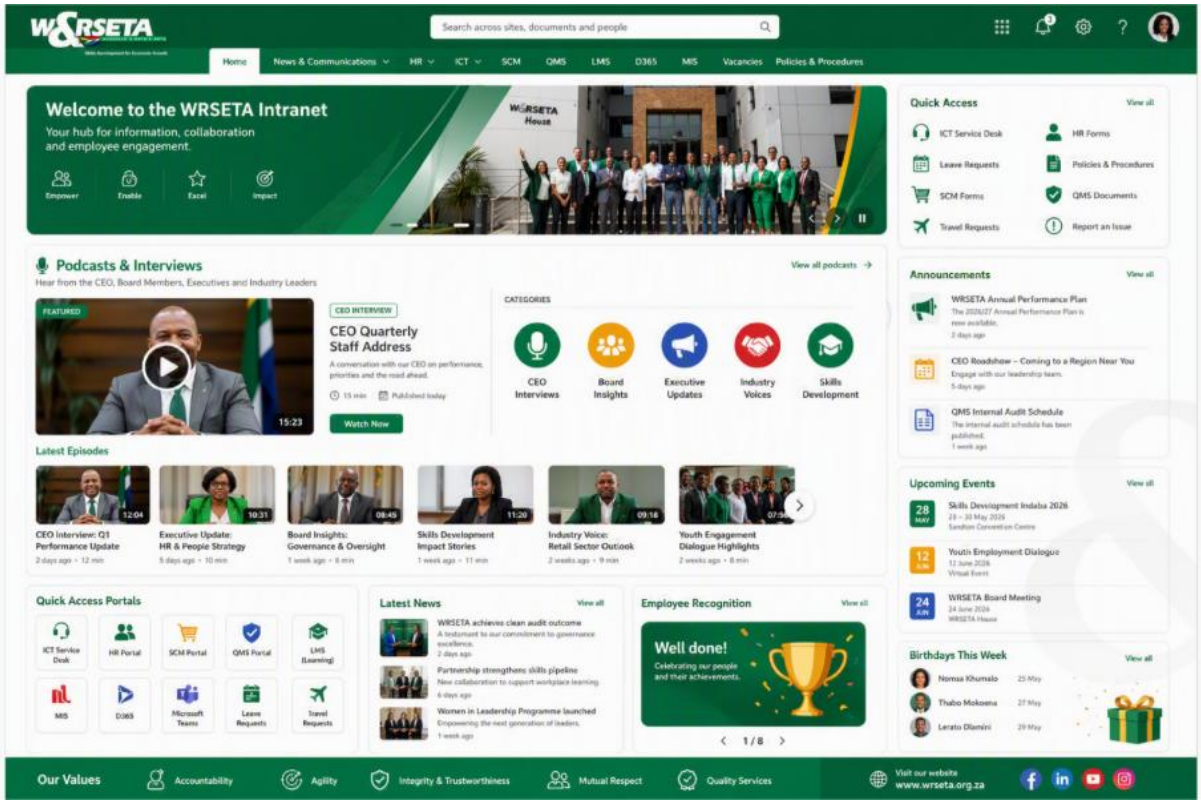

Figure 1: W&RSETA SharePoint intranet design reference

4. BUSINESS DRIVERS

4.1 Infrastructure and Service Delivery Drivers

- Improve organisational efficiency through digitised workflows.
- Enhance collaboration across business units and provincial offices.

- Reduce reliance on email and uncontrolled document storage.
- Improve retrieval of documents, records and historical information.
- Reduce system clutter, outdated folder structures and duplicate information.
- Implement security and compliance controls across information assets.
- Strengthen user experience and business process automation.

4.2 Strategic Drivers

- Enable digital transformation and modern workplace capabilities.
- Strengthen data governance, security and information integrity.
- Align SharePoint usage to sector compliance and audit-readiness requirements.
- Ensure seamless access to information anytime and anywhere.
- Support operations, stakeholder communication and organisational productivity.

5. CURRENT ICT PROFILE RELATED TO SHAREPOINT

W&RSETA currently uses SharePoint Online as part of the Microsoft 365 A5 suite. However, the current environment requires optimisation to improve consistency, governance, metadata, retention, user experience and overall platform usage.

- Metadata is not standardised across document libraries.
- Document stores are cluttered and require rationalisation.
- Several workflows remain manual and paper-based across departments.
- Retention labels and compliance features are not fully enabled.
- There is no unified architecture for hubs, communication sites and department sites.
- The current configuration limits the full utility of SharePoint Online as an enterprise digital workplace platform.

6. SCOPE OF WORK REQUIREMENTS

6.1 SharePoint Assessment

- Conduct a full audit of all existing SharePoint sites, libraries and content locations.
- Review permissions, security groups, external sharing links and legacy access arrangements.

• Audit document libraries, unused sites, clutter, duplications and obsolete content.

• Identify workflow opportunities for automation and business process improvement.

• Configure or recommend reporting capabilities for monitoring compliance, usage and performance.

6.2 User Interface, Intranet Experience and Branding

• Redesign the SharePoint user interface to reflect a modern W&RSETA intranet experience aligned to the design reference.

• Provide intuitive navigation, prominent search, quick access portals, news, communications, staff announcements, events, employee recognition and multimedia areas such as podcasts and interviews.

• Ensure the interface is responsive and accessible across desktop, laptop, tablet and mobile devices.

• Apply consistent W&RSETA branding, iconography, page layouts, reusable templates and visual standards across departments, regional offices and business units.

• Simplify the user journey so that staff can find documents, systems, forms, policies and service portals with minimal clicks.

• Submit wireframes, clickable prototypes or design mock-ups for W&RSETA review and approval before implementation.

• Deliver documented page templates and governance rules to ensure future pages remain consistent and sustainable.

6.3 SharePoint Architecture Redesign

• Develop a modern SharePoint Information Architecture for W&RSETA.

• Implement a hub-and-spoke model for simplified navigation and governance.

• Create standardised site templates for departments, provincial offices and business functions.

• Reorganise content into logical, user-friendly structures aligned to the approved institutional File Plan.

6.4 Document and File Arrangement Best-Practice Requirements

• Design and implement a best-practice SharePoint document and file arrangement model that avoids uncontrolled folder sprawl.

• Base the structure on the approved institutional File Plan, business functions, metadata, content types, document libraries, retention rules, search configuration and role-based access control.

• Configure document libraries with mandatory metadata, controlled naming conventions, standardised views, version history, check-in/check-out where applicable, approval workflows and retention labels.

• Rationalise existing content by identifying duplicate, obsolete, redundant and trivial information and recommending clean-up, migration, archiving or disposal actions in line with governance requirements.

• Improve search, filtering, reporting, auditability, lifecycle management, security and user adoption.

• Deliver an information architecture blueprint including site map, library structure, metadata schema, content types, permission model, retention approach and migration mapping.

• Enable version control, co-authoring, online editing of documents and metadata-driven search across libraries.

6.5 Records Management Optimisation

• Support the formal declaration of records manually by users or automatically through system-defined triggers.

• Ensure declared records are immutable and protected from alteration, deletion or overwriting.

• Apply retention schedules based on File Plan classification.

• Generate disposal lists and route them through approval workflows involving the Records Manager and relevant governance structures.

• Log all records lifecycle actions to support auditability and legal defensibility.

• Support legal holds for records subject to litigation, audit or investigation.

6.6 Archives Management Optimisation

• Provide a dedicated archival repository for long-term preservation of records with enduring value.

• Preserve records in formats that support long-term accessibility, such as PDF/A and TIFF where applicable.

• Maintain integrity and authenticity of archival records through audit logs and access controls.

• Allow retrieval of archival records for reference, audit or legal purposes without compromising integrity.

• Ensure access to archival repositories is granted on a controlled, request-based and time-bound basis.

• Differentiate archived records from active records through metadata tagging and visual indicators.

6.7 Workflow and Automation

• Identify automation opportunities across business processes.

• Build Power Automate flows for leave processes, document approvals, procurement workflows, records submissions, notifications and routing.

• Reduce manual work, paper-based processes and email-dependent approvals.

• Document workflow ownership, trigger conditions, approval paths, escalation rules and support arrangements.

• Develop a prioritised workflow automation backlog with W&RSETA, showing quick wins, high-impact processes, complexity, benefits and implementation sequence.

• Configure workflow reporting to monitor approval turnaround times, bottlenecks, pending actions, escalations and completed transactions.

6.8 Permissions, Security and Compliance

• Implement role-based access control aligned to W&RSETA governance requirements.

• Remove legacy permissions, inherited permissions that create risk, and anonymous or unmanaged sharing links.

• Apply retention labels and compliance standards where required.

• Ensure SharePoint access controls align to ICT governance, information security and records management requirements.

• Confirm that multi-factor authentication and Microsoft 365 security controls support protection of documents, records and archives.

• Conduct a SharePoint permissions and access review with W&RSETA ICT, including identification of excessive access, orphaned users, unmanaged sharing links, external sharing risks and recommended remediation actions.

• Provide a security and compliance configuration report confirming applied controls, outstanding risks, recommended improvements and alignment to Microsoft 365 security and governance best practices.

6.9 Full Microsoft 365 and SharePoint Capability Utilisation

• Demonstrate maximum practical use of W&RSETA's Microsoft 365 and SharePoint Online investment, including modern pages, document libraries, lists, web parts, audience targeting, search, metadata, versioning, retention, workflows, dashboards and reporting.

• Identify underutilised Microsoft 365 and SharePoint capabilities and recommend how they can improve business value.

• Configure governance controls for sustainable use after project closure, including ownership, site lifecycle reviews, storage governance, permissions reviews and change-control processes.

• Support future expansion including additional business workflows, departmental portals, regional collaboration areas and integration with Microsoft Teams and Power Automate where appropriate.

• Develop a SharePoint governance operating model covering site ownership, content ownership, permissions reviews, naming standards, page publishing rules, workflow ownership, support responsibilities and change-control procedures.

• Implement platform usage and adoption reporting to show active sites, document activity, popular content, search usage, workflow volumes, user adoption trends and improvement opportunities.

6.10 Migration and Restructuring

• Remove duplicated and outdated content in line with approved clean-up decisions.

• Apply metadata during migration and restructuring activities.

• Ensure minimal downtime and business disruption during restructuring.

• Provide migration mapping and validation reports before final handover.

• Perform user acceptance testing with nominated W&RSETA representatives before final go-live, including documented test scenarios, defects, resolutions and sign-off by ICT and business owners.

6.11 Training and Handover

• Provide administrator training to the ICT team.

• Provide end-user basic training for departments and selected business champions.

• Provide full documentation covering architecture, permissions, workflows, metadata schemas, governance rules and support arrangements.

• Provide maintenance and support as and when required for an initial period of 12 months from implementation handover, within the three-year contract period. These services must be priced separately from the Section A once-off implementation fee and billed under Section B at the applicable quoted hourly rates for authorised hours actually worked. No fixed monthly fee or guaranteed allocation of hours applies.

• Provide SharePoint Online development, enhancements, incident resolution, minor change requests, user support and continuous improvement as and when required during the three-year contract period, including maintenance and support after the initial 12-month period. All such services require prior written authorisation through an approved work order or service request and must be billed at the applicable Section B contract-year hourly rates, supported by timesheets and activity reports. Work included in the Section A once-off deliverables must not be billed again under Section B.

• Maintain a support and maintenance plan that includes service levels, escalation procedures, monthly reporting, issue tracking, knowledge transfer and continuous governance improvement.

• Provide a transition and exit plan to ensure W&RSETA can continue operating and supporting the SharePoint environment at the end of the contract, including documentation handover, knowledge transfer, open issues, configuration details and outstanding improvement recommendations.

7. EXPECTED OUTCOMES AND DELIVERABLES

• Fully optimised SharePoint Online environment.

• Consistent, compliant and user-friendly intranet design.

• Reduced clutter and improved navigation across SharePoint sites.

• Digitised workflows replacing manual and paper-based processes.

• Enhanced security, governance and data protection.

• Improved productivity, collaboration and information retrieval.

• Clear documentation and long-term maintainability.

• Environment aligned to W&RSETA's digital transformation strategy.

• Sustainable three-year SharePoint support model with clear service levels, issue resolution, enhancement management, governance reviews and continuous improvement reporting.

8. MONITORING PROGRESS OF SERVICE

• Provide weekly project status updates.

• Provide tracking reports and dashboards.

• Participate in project governance meetings.

• Ensure W&RSETA ICT sign-off at each project phase.

• Provide issue, risk and decision logs during implementation.

• Submit monthly support reports during the support period, including incidents logged, incidents resolved, pending issues, enhancement requests, training provided, governance actions and recommendations for continuous improvement.

• Conduct quarterly governance and optimisation review sessions with W&RSETA ICT to assess platform usage, permissions, storage, adoption, workflow performance, records management and improvement opportunities.

9. INDEPENDENCE AND OBJECTIVITY OF STAFF

• Personnel assigned to the project must be Microsoft SharePoint certified or demonstrably experienced in enterprise SharePoint implementations.

• Personnel must be experienced in enterprise SharePoint, Microsoft 365, Power Automate, document management and governance implementations.

• Personnel must comply with W&RSETA confidentiality and governance requirements.

- The service provider must ensure that all project resources act independently, professionally and objectively.

6. EVALUATION PROCESS

Mandatory Requirements:

Bidders must comply with all mandatory requirements before their submissions can proceed to technical evaluation. Failure to submit the required mandatory evidence may result in the bid being deemed non-responsive. Requirements relating to specific project resources and years of experience will be evaluated under the technical evaluation criteria and will not be treated as mandatory disqualification requirements unless expressly stated otherwise.

Mandatory Requirement	Requirement Description	Mandatory / Score	Required Evidence
Microsoft 365 / SharePoint Capability	Bidders must demonstrate that they are suitably qualified and experienced to deliver SharePoint Online, Microsoft 365, Power Automate, governance, records management and intranet optimisation services in an enterprise environment.	**Mandatory / 0**	Valid Microsoft partner evidence, SharePoint Online/Microsoft 365 capability evidence, relevant certifications or equivalent proof of capability.

TECHNICAL EVALUATION CRITERIA			
Criteria	**Sub-criteria**	**Score**	**Form of evidence**
Capacity to Deliver	**SharePoint Modernisation Experience** Bidders must provide at least three completed SharePoint Online, Microsoft 365, intranet redesign, information architecture, governance or workflow automation projects from 2020 onwards. • Less than 3 relevant reference letters or project summaries: **0 Points**. • Submission of 3 relevant reference letters or project summaries: **14 Points**. • Submission of 4 or more relevant reference letters or project summaries: **20 Points**.	**20**	Signed client contactable reference letters showing client name, project description, period, scope completed and contactable reference details.
	Delivery Plan / Methodology Bidders must submit a delivery methodology that demonstrates how the SharePoint optimisation project will be delivered safely, effectively and with minimal disruption. • Discovery, design and approval approach: **3 Points**. • Implementation schedule with milestones, dependencies and W&RSETA sign-off stages: **3 Points**.	**15**	Project methodology, implementation plan, migration plan, training plan, support model, governance approach and reporting templates.

TECHNICAL EVALUATION CRITERIA			
Criteria	**Sub-criteria**	**Score**	**Form of evidence**
	• Migration, restructuring and deployment approach: **3 Points**. • Change management, training and handover approach: **2 Points.** • Project governance, reporting, risk, issue and escalation management: **2 Points**. • Post-implementation support and continuous improvement approach: **2 Points**.		
Conformance to Technical Specification	**SharePoint Technical Compliance** • Completed compliance matrix cross-referenced to the scope of work requirements: **7 Points.** • Information architecture blueprint covering sites, hubs, libraries, metadata, content types, permissions and search: **7 Points.** • Document, records and archive management approach aligned to the approved File Plan, retention, auditability and governance requirements: **7 Points.** • Workflow automation approach covering Power Automate, approvals, notifications, routing, escalation, ownership and reporting: **7 Points.**	**40**	• **Required Evidence must be provided per sub-scoring item as follows:** • **Compliance matrix:** Completed matrix showing each TOR requirement, bidder response, page reference and supporting document reference. • **Information architecture:** Sample site map, hub structure, library structure, metadata model, content types or permissions model from previous work or a proposed W&RSETA design. • **Document, records and archive management:** Sample file plan mapping, retention label approach, records management design, archive process, disposal workflow or audit report. • **Workflow automation:** Sample Power Automate workflow design, screenshots, process map, approval flow, escalation rules or workflow report.

TECHNICAL EVALUATION CRITERIA			
Criteria	**Sub-criteria**	**Score**	**Form of evidence**
	• User experience and intranet design approach covering navigation, branding, page templates, accessibility, responsive design and search: **6 Points.** • Security, compliance and governance approach covering permissions, external sharing, access reviews, retention labels, audit logs and Microsoft 365 controls: **6 Points**.		• **User experience and intranet design:** Sample intranet design, wireframe, page template, navigation layout, branding example or screenshots of previous SharePoint design work. • **Security, compliance and governance:** Sample permissions model, access review report, external sharing control, governance framework, compliance report or Microsoft 365 security configuration example. • All evidence must show the client or project name, project period, bidder role and supporting page/document reference. Generic AI-generated information, copied internet content or repeated TOR wording must not be accepted as evidence.
Project Team Capability	**Project Team Capability** Bidders must provide detailed CVs or profiles for the key project resources assigned to the project. Points will be awarded according to relevant experience as follows: **SHAREPOINT DEVELOPER** • Less than 3 years of experience in the provision SharePoint optimisation services: **0 Points**; • 3–4 years of experience in the provision SharePoint optimisation services: **4 Points;**	**15**	Detailed CVs or profiles for the SharePoint Developer, Project Manager, Records / Information Governance or Compliance Resource, and Training, Change Management and Handover Resource, showing name, proposed role, relevant experience, qualifications or certifications, similar projects completed and the resource's role in those projects.

TECHNICAL EVALUATION CRITERIA			
Criteria	**Sub-criteria**	**Score**	**Form of evidence**
	• 5 or more years of experience in the provision SharePoint optimisation services: **5 Points.** **PROJECT MANAGER** • Less than 3 years of experience in the provision SharePoint optimisation services: **0 Points**; • 3–4 years of experience in the provision SharePoint optimisation services: **3 Points;** • 5 years or more of experience in the provision SharePoint optimisation services: **4 points.** **RECORDS / INFORMATION GOVERNANCE OR COMPLIANCE RESOURCE** • Less than 2 years of experience in the provision SharePoint optimisation services: **0 Points;** • 2 years of experience in the provision SharePoint optimisation services: **2 Points;**		

TECHNICAL EVALUATION CRITERIA			
Criteria	**Sub-criteria**	**Score**	**Form of evidence**
	• 3 years or more of experience in the provision SharePoint optimisation services: **3 Points.** **TRAINING, CHANGE MANAGEMENT AND HANDOVER RESOURCE** • Less than 2 years of experience in the provision SharePoint optimisation services: **0 Points;** • 2 years of experience in the provision SharePoint optimisation services: **2 Points;** • 3 years or more of experience in the provision SharePoint optimisation services: **3 Points**.		
Quality Assurance and Testing	**Quality Assurance and Testing Approach** Bidders must demonstrate how they will test, validate and obtain sign-off for the SharePoint environment before go-live. • Test plan covering functional, security, permissions, workflow, migration and user acceptance testing: **3 Points.**	**10**	Quality assurance plan, test plan, sample test cases, defect register template, UAT sign-off template and post-go-live validation report template.

TECHNICAL EVALUATION CRITERIA			
Criteria	**Sub-criteria**	**Score**	**Form of evidence**
	• Defect management process showing how issues will be logged, prioritised, resolved and retested**: 2 Points.** • User acceptance testing and sign-off process involving ICT and business representatives: **2 Points**. • Post-go-live validation and quality assurance reporting: **3 Points**.		
Total Technical Evaluation Score		**100**	

Note: The minimum threshold for the technical evaluation criteria is 70%. Bidders who achieve 70% or more will be considered for Price and Specific Goal evaluations. If no bidder scores 70% and more than the bid will be cancelled and readvertised.