



MBD1

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE THULAMELA MUNICIPALITY					
BID NUMBER:	12/2026/2027	CLOSING DATE:	23 SEPTEMBER 2026	CLOSING TIME:	11:00 AM
DESCRIPTION	PROCUREMENT OF AN E-RECRUITMENT DIGITAL SERVICES PLATFORM WITH INTEGRATED CRM AND CITIZEN-CENTRIC APPLICATION				

THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX
SITUATED AT (STREET ADDRESS)

OLD AGRIVEN BUILDING

THOHOYANDOU

0950

SUPPLIER INFORMATION

NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE	NUMBER	
CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE	NUMBER	
E-MAIL ADDRESS			
VAT REGISTRATION NUMBER			
TAX COMPLIANCE STATUS	TCS PIN:	OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	☐ Yes ☐ No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	☐ Yes ☐ No

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER PART B:3]
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TOTAL NUMBER OF ITEMS OFFERED	TOTAL BID PRICE R
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SIGNATURE OF BIDDER	DATE
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CAPACITY UNDER WHICH THIS BID IS SIGNED	
--	--

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:		TECHNICAL INFORMATION MAY BE DIRECTED TO:	
DEPARTMENT	FINANCE	CONTACT PERSON	MR DAVHULA K
CONTACT PERSON	MUDZILI TP	TELEPHONE NUMBER	015 962 7718
TELEPHONE NUMBER	015 962 7629	FACSIMILE NUMBER	
FACSIMILE NUMBER	015 962 4020	E-MAIL ADDRESS	davhulak@thulamela.gov.za
E-MAIL ADDRESS	mudzilip@thulamela.gov.za		



MBD1

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:	
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.	
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE	
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.	
2. TAX COMPLIANCE REQUIREMENTS	
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.	
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.	
2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA .	
2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3.	
2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.	
2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.	
2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.	
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.	

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.
NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

DATE:



THULAMELA MUNICIPALITY

Civic Centre,
Old Agriven Building,
Private Bag X5066
Thohoyandou, 0950
Limpopo Province
Tel: (015) 962 7500
Fax: (015) 962 4020
(015) 962 5328

INVITATION TO BID

PROCUREMENT OF AN E-RECRUITMENT DIGITAL SERVICES PLATFORM WITH INTEGRATED CRM AND CITIZEN-CENTRIC APPLICATION

Thulamela Municipality invites service providers for provision of the following service:

Bid Number	Project Description	Non-Refundable Bid Price	Contact Person	Evaluation Criteria
No.:12/ 2026 /2027	Procurement of an e-recruitment digital services platform with integrated CRM and citizen-centric application	R4.00 per page or can be downloaded from the Thulamela website (www.thulamela.gov.za) for free	Mr Davhula K. (015 962 7718) and/or Mr Mudzili T.P. (015 962 7629)	80/20 Preference points system and functionality

Tender documents are obtainable from Procurement Office, Office No. 02 at Thulamela Local Municipality Head Office, during the following times: 08:00 to 15:30 (Monday to Friday) at a non-refundable bid price of R4.00 per page from 21 August 2026 to 23 September 2026 or can alternatively be downloaded from the Thulamela website (www.thulamela.gov.za) for free. The tenderer(s) should also download SCM forms that are found in the Documents SCM-FORMS folder on the website and complete them as part of the Bid documents.

The service providers must submit the completed Bid documents (in black ink) and hand deliver or courier them to Thulamela Municipality. All completed Bid documents (hand delivered or couriered) must be dropped in the BID BOX before the closing date and time of the Bids' closure. The onus is on the service providers to ensure that the Bid documents are submitted on time, and late submissions will not be accepted.

Interested service providers will be expected to submit the Bid documents with the following compulsory requirements

- Tax Compliance Status Letter or Tax Compliance Pin Number.
- Company registration documents (e.g., CK).
- Proof of registration on CSD.
- Bidders must submit proof that municipal rates and taxes for both the company and its director(s) are not in arrears for more than three (3) months, and such proof must not be older than three (3) months from the closing date of advertisement. Where the business operates from leased premises, a valid lease agreement must be attached. Where a director does not own property or is renting, a valid lease agreement must also be provided. If the bidder resides or operates in an area where municipal services are not billed, an official signed and stamped letter from the relevant local municipality, not older than three (3) months from the date of advertisement, must be submitted confirming that the area is not subject to municipal billing and that the bidder is formally exempted from municipal service charges.
- List of similar projects completed in the last 5 years by the company with client's contact details, descriptions, and contract values (Attach signed appointment letters and/or purchase orders)

Bids will be assessed under the provisions of the following Acts and their Regulations: Municipal Finance Management Act (Act 56 of 2003); PPPFA, Supply Chain Management Policy of the municipality, in accordance with the specifications and in terms of the 80/20 preferential points system and functionality.

Functionality Score Table:

EVALUATION CRITERIA	POINTS ALLOCATED
Project personnel (Qualifications and Curriculum Vitae)	55%
Implementation methodology	25%
Relevant Implementation experience	10%
Solution demonstration document	10%
TOTAL	100%

Functionality will be scored out of 100%, and bidders scoring below 70% will be disqualified from further evaluation.

Specific Goals Categories (CSD will be used for verification)	Number of Points (80/20 system) 20 Points breakdown
1. 100% Black ownership	10
2. 100% Women ownership	5
3. Youth	3
4. Disability (Medical certificate will be used to verify the disability status of the bidder).	2

Sealed bid documents must be submitted in envelopes clearly indicating "BID NUMBER AND DESCRIPTION" on the outside and must reach the undersigned by depositing it into the official Bid Box at the front of the main entrance to Thohoyandou Civic Centre, Old Agriven Building, Thohoyandou, by no later than 11H00 on, 23 September 2026.

The Municipality is not bound to accept the lowest Bid and reserves the right to accept any part of a Bid. Bids must remain valid for a period of ninety (90) days after closing date of the submission thereof.

Bids may only be submitted on the bid documentation provided by the municipality.

NB: Bids which are late, incomplete, unsigned, completed by pencil, sent by telegraph, facsimile, electronically (Fax), or E-mail and without the compulsory requirements will be disqualified.

SIGIDI KTM
MUNICIPAL MANAGER

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THULAMELA MUNICIPALITY

Civic Centre,
Old Agriven Building,
Private Bag X5066
Thohoyandou, 0950
Limpopo Province
Tel: (015) 962 7500
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INVITATION TO BID

CONSTRUCTION OF NGOVHELA-PHINDULA RING ROAD.

Bid Number	Project Description	Non-Refundable Bid Price	CIDB GRADING	Evaluation Criteria
No.:17/ 2026 /2027	Construction of Ngovhela-Phindula ring road.	R4.00 per page or Bids can be downloaded from Thulamela website (www.thulamela.gov.za) for free	4CE or Higher	80/20 Preference points system and functionality

Tender documents are obtainable from Procurement Office, Office No. 02 at Thulamela Local Municipality Head Office, during the following times: 08:00 to 15:30 (Monday to Friday) as from 21 August 2026 to 09 September 2026 at a non-refundable bid price of R4.00 per page, or can alternatively be downloaded from Thulamela website (www.thulamela.gov.za) for free. The bidders should also download SCM forms that are found in the Documents SCM-FORMS folder on the website and complete as part of the Bid documents.

The service providers must submit the completed Bid documents (in black ink) and hand deliver or courier them to Thulamela Municipality. All completed Bid documents (hand delivered or couriered) must be dropped in the BID BOX before the closing date and time of the Bids closure. The onus is on the service providers to make sure the Bid documents are submitted on time and late submission won't be accepted.

Interested Contractors must attend a compulsory briefing session on 31 August 2026 at 11h00.
Location: At the junction of R523 and Ngovhela Phindula road next to Ngovhela Lutheran Church.

Interested Contractors will be expected to submit the Bid documents with the following compulsory requirements.

- Tax Compliance Status Letter or Tax Compliance Pin Number
- Valid CIDA Letter of Good Standing
- Company registration documents (e.g., CK)
- Company profile
- Proof of registration with CIDB
- Proof of registration on CSD
- In case of a joint venture (JV), a signed JV agreement must be submitted
- Bidders must submit proof that municipal rates and taxes for both the company and its director(s) are not in arrears for more than three (3) months, and such proof must not be older than three (3) months from the closing date of advertisement. Where the business operates from leased premises, a valid lease agreement must be attached. Where a director does not own property or is renting, a valid lease agreement must also be provided. If the bidder resides or operates in an area where municipal services are not billed, an official signed and stamped letter from the relevant local municipality, not older than three (3) months from the date of advertisement, must be submitted confirming that the area is not subject to municipal billing and that the bidder is formally exempted from municipal service charges.
- List of construction of roads and storm-water projects completed by contractor in the last 10 years with clients contact details, description and contract values (Attach signed appointment letters, completion certificates and reference letters)
- All records of any additional information posted should be submitted as compulsory requirements and it is the responsibility of the bidders to check with the respective project engineer or client representatives (contact details as provided) if there are any additional information before submission of the tender documents

Tenderers should note the following: Functionality will be scored out of 100% and the minimum threshold to qualify is 70%. Tenderers who fail to meet the minimum threshold will not be considered for further evaluation.

TARGETED GOALS:	WEIGHT
EXPERIENCE OF THE CONSTRUCTION COMPANY Demonstrate company experience / past performance in Roads and Storm Water construction projects.	40
PLANT AND EQUIPMENT Proof of plant and equipment owned by the bidder. Details of major equipment owned (Please provide proof of ownership. Valid license disc and certificate of registration in the names of the bidder. Invoice or bank letter can serve as proof of ownership).	30
EXPERIENCE OF KEY PERSONEL Key staff- demonstrate qualifications and experience.	20
FINANCIAL STANDING Financial reference of the construction company.	10
TOTAL	100

Bids will be assessed under the provisions of the following Acts and its Regulations: Municipal Finance Management Act, (Act 56 of 2003); PPPFA, Supply Chain Management Policy of the municipality in accordance with the specifications and in terms of 80/20 preferential points system and functionality as per the advert and bid document.

Specific Goals Categories (CSD will be used for verification)	Number of Points (80/20 system) 20 Points breakdown
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Administrative queries can be directed to Mr. Mudzili T.P. at 015 962 7629 and Technical queries can be directed to Mr. Muvuvhu E. 083 784 9478 and/or Mr. Tshikungulu ME at 082 087 0195 during office hours.

The Municipality is not bound to accept the lowest Bid and reserves the right to accept any part of a Bid. Bids must remain valid for a period of ninety (90) days after closing date of the submission thereof.

Bids may only be submitted on the bid documentation provided by the municipality.

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MUNICIPAL MANAGER

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THULAMELA MUNICIPALITY

INVITATION TO BID

PROCUREMENT OF AN E-RECRUITMENT DIGITAL SERVICES PLATFORM WITH INTEGRATED CRM AND CITIZEN-CENTRIC APPLICATION

Thulamela Municipality invites prospective service providers for the provision of the following service:

BID NUMBER	DESCRIPTION	NON-REFUNDABLE BID PRICE	CONTACT PERSON	EVALUATION CRITERIA
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- ❖ List of similar projects completed in the last 5 years by the company with clients' contact details, descriptions, and contract values (Attach signed appointment letters or purchase orders)

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SIGIDI K.T.M.
MUNICIPAL MANAGER

13/08/2026
DATE

Document Control

Item	Description
Document title	Procurement of an E-Recruitment Digital Services Platform with Integrated CRM and Citizen-centric Application
Business owner	Corporate Services / Municipal Manager delegated office
Phase 1 business lead	Human Resource Management – E-Recruitment
Technical owner	ICT Services
Service owner(s)	Corporate Services, Community Services and other participating departments
Procurement owner	Supply Chain Management
Version	1.0
Prepared date	15 June 2026
Confidentiality	Internal working draft until formally approved for bid issue
Intended use	Internal approval, budgeting, bid specification, vendor response and implementation governance

Revision History

Version	Date	Description	Prepared by
1.0	01 June 2026	Procurement of an e-recruitment digital services platform with integrated CRM and citizen-centric application	Davhula Kennedy

Approval Sheet

Role	Name	Signature	Date
Municipal Manager / Accounting Officer			
Director: Corporate Services			
Manager: Human Resource Management			
Manager: ICT Services			
Director: Community Services			
Chief Financial Officer			
Supply Chain Management			

Table of Contents

Document Control	5
Revision History	5
Approval Sheet	5
Executive Summary	10
Part A: Terms of Reference (TOR)	10
1. Background and Strategic Context	10
2. Purpose of this TOR	10
3. Procurement Intent	10
4. Objectives	11
5. Scope of Work	11
5.1 Overall Platform Scope	11
5.1.1 Applicant Recruitment Portal	11
5.1.2 HR Management Dashboard	11
5.1.3 Executive Oversight Dashboard	11
5.1.4 Workflow and Automation Engine	11
5.1.5 Omnichannel Communication Layer	12
5.2 Phase 1 Scope (Mandatory)	12
5.2.1 Municipal CRM Ecosystem	12
5.3 Dashboards and Analytics	12
5.4 Technical Architecture Requirements	13
5.4.1 Front-End Components	13
5.4.2 Middleware and Integration Layer	13
5.4.3 Back-End Infrastructure	13
5.4.4 Security Framework	13
5.5 Future Phases (Indicative / Optional but required as roadmap)	13
6. Contracting Model	13
7. Mandatory Bidder Submission Requirements	14
8. Recommended Evaluation Framework (for SCM finalisation)	14
9. Governance and Project Structures	14
10. Deliverables	14
Part B: Business Requirements Specification (BRS)	15
11. Business Problem Statement	15
12. Target Operating Concept	15
13. Business Outcomes	15
14. Platform Modules	15
15. Phase 1 Functional Requirements – E-Recruitment	15

15.1 Vacancy Requisition and Approval	15
15.2 Careers Portal and Vacancy Publication.....	16
15.3 Applicant Registration and Online Applications	16
15.4 Screening and Shortlisting	16
15.5 Interview and Assessment	16
15.6 Verification and Appointment	16
15.7 Recruitment CRM and Communications.....	16
15.8 Recruitment Reporting	16
16. Foundational Platform Requirements (Must exist from Phase 1 even if future modules are not yet activated).....	16
16.1 Citizen Portal Foundation	16
16.2 CRM Foundation	16
16.3 Workflow Foundation.....	17
16.4 Mobile App Foundation	17
16.5 Document and Records Foundation	17
17. Future Phase Functional Requirements (Roadmap and architecture must cater for them)	17
17.1 Complaints and Service Requests	17
17.2 General Municipal Queries.....	17
17.3 Appointments and Bookings.....	17
17.4 Public Participation and Notices.....	17
17.5 Additional E-Service Forms.....	17
18. User Roles	17
19. Non-Functional Requirements	18
19.1 Security and Access Control	18
19.2 Privacy and POPIA.....	18
19.3 Performance and Scalability.....	18
19.4 Availability and Continuity	18
19.5 Usability and Accessibility	18
19.6 Configurability.....	18
20. Technical Architecture Requirements	18
21. Integration Requirements.....	18
Pillar I Universal Data Hub and Enterprise Data Warehouse	19
Pillar II Intelligent Reporting and Business Intelligence	19
Pillar III AI-Powered Document and Records Management Hub.....	19
22. Data and Records Requirements.....	20
23. Reporting Requirements	20
24. Implementation Approach	20

24.1 Phase 1 – E-Recruitment Implementation	20
24.2 Phase 2 – Citizen CRM and Service Requests.....	Error! Bookmark not defined.
24.3 Phase 3 – Additional Municipal E-Services.....	Error! Bookmark not defined.
25. Indicative Timeline	20
26. Acceptance Criteria.....	20
27. Risk Register – Initial View	21
28. Pricing Schedule Requirements.....	21
29. Vendor Compliance Matrix Instructions	21
30. Conclusion	21
31. Evaluation Criterion 1.....	22
32. Reference.....	24
Annexure A: Suggested Phase 1 Demonstration Script.....	23
Annexure B: Suggested Future-Service Demonstration	23
Annexure C: Suggested UAT Scenarios for Phase 1.....	23
Annexure D: Suggested Future Phase Roadmap Template	23



Thulamela Municipality

TENDER SPECIFICATION

TERMS OF REFERENCE (TOR) AND BUSINESS REQUIREMENTS SPECIFICATION (BRS)

PROCUREMENT OF AN E-RECRUITMENT DIGITAL SERVICES PLATFORM WITH INTEGRATED CRM AND CITIZEN-CENTRIC APPLICATION

Phase 1 Priority: E-Recruitment Module

Document Title	Version	Prepared Date	Status
Procurement of an e-recruitment digital services platform with integrated CRM and citizen-centric application	1.0	15 June 2026	Tender Specification

Prepared for:

Municipal Manager
Thulamela Local Municipality
Corporate Services / Human Resource Management / ICT Services / Community Services
Private Bag X5066, Thohoyandou, 0950

Executive Summary

Thulamela Local Municipality requires a broader digital platform than a standalone recruitment system. To support citizen-centric service delivery, smart administration, public participation, improved responsiveness and a modern municipal digital relationship with residents and stakeholders, the Municipality seeks to procure an integrated Citizen-Centric Municipal Digital Services Platform that includes a citizen portal, customer relationship management (CRM), workflow and case management, mobile application capability, notifications, reporting and modular e-services.

This TOR and BRS are intentionally structured as a phased platform specification. Phase 1 is prioritised as the E-Recruitment module because recruitment is an immediate need and provides a manageable entry point to establish platform capability, identity, workflow, document handling, reporting, mobile-responsiveness and citizen/applicant interaction patterns. Subsequent phases will extend the same platform into other municipal digital services such as complaints management, service requests, citizen queries, appointments, public participation and service notifications.

The benefit of this approach is that the Municipality invests in a reusable digital foundation rather than in isolated point solutions. It allows recruitment to be implemented first without losing sight of the bigger digital service vision. The successful bidder must therefore provide both a Phase 1 implementation approach and a scalable multi-phase roadmap.

Part A: Terms of Reference (TOR)

1. Background and Strategic Context

Thulamela Local Municipality is pursuing improved smart administration, good governance, public participation and municipal transformation in support of its long-term vision and service delivery mandate. The Municipality's planning and governance context supports the establishment of digital platforms that improve access, responsiveness, accountability and operational efficiency.

The Municipality now requires a combined digital platform that can serve as a single front door for digital interaction with residents, applicants, businesses and stakeholders, while supporting internal workflow routing, customer relationship management, case handling, document management and reporting.

2. Purpose of this TOR

- Define the scope, objectives, deliverables and service expectations for the procurement of a modular citizen-centric digital services platform.
- Establish a phased implementation approach with E-Recruitment as the Phase 1 priority module.
- Provide vendors with detailed requirements for current and future modules on a common platform.
- Enable fair bid evaluation and provide a baseline for contract management and implementation governance.

3. Procurement Intent

The Municipality intends to procure an integrated platform with the following strategic characteristics:

- Citizen-centric by design, with web and mobile engagement capability.
- Built around a municipal CRM and case/workflow engine.
- Modular, so that Phase 1 can focus on E-Recruitment while subsequent phases extend to additional e-services without replacing the platform.
- Secure, auditable and compliant with municipal governance, privacy and records obligations.
- Capable of integration with municipal systems and future service channels.

4. Objectives

1. Establish a single digital platform for citizen and stakeholder interaction with the Municipality.
2. Implement E-Recruitment as the first production module in Phase 1.
3. Create a foundation for CRM-driven service requests, complaints, queries, appointments and public participation services in later phases.
4. Improve digital access, response times, auditability, data quality and communication across municipal functions.
5. Support future mobile application services and reusable workflows rather than procuring multiple disconnected systems.

5. Scope of Work

5.1 Overall Platform Scope

The E-Recruitment Ecosystem constitutes the primary deliverable of this engagement and shall encompass the following functional sub-components:

- Citizen web portal
- Municipal CRM/customer master/interaction history
- Case management and workflow engine
- Notification engine (email, SMS and push notifications where approved)
- Document and records handling capability
- Reporting and analytics dashboard capability
- Mobile application capability/framework
- Modular e-service architecture
- Security, audit trail and administration functions

5.1.1 Applicant Recruitment Portal

- Online vacancy browsing and application submission
- Curriculum vitae and supporting documentation uploads
- Applicant tracking with real-time status notifications via SMS and email
- Fully mobile-responsive interface accessible across all device classes

5.1.2 HR Management Dashboard

- Vacancy creation, approval workflows, and position management
- Candidate management and structured shortlisting tooling
- Automated interview scheduling and panel coordination
- Granular recruitment analytics and reporting

5.1.3 Executive Oversight Dashboard

- Real-time recruitment KPI monitoring and exception alerts
- Compliance reporting with legislative alignment indicators
- Audit reporting with full evidentiary trail
- Departmental comparative analytics

5.1.4 Workflow and Automation Engine

- Automated application routing and approval hierarchy management
- Configurable escalation workflows and SLA tracking

- Rule-based notification and reminder engine

5.1.5 Omnichannel Communication Layer

- Email integration with institutional mail servers
- SMS gateway integration for applicant and internal notifications
- WhatsApp Business API notifications
- Internal workflow alert and messaging system

5.2 Phase 1 Scope (Mandatory)

Phase 1 shall implement the E-Recruitment module on the common platform. Phase 1 is mandatory and forms the minimum procurement baseline.

- Vacancy requisition and approval
- Vacancy publication and careers portal
- Applicant registration and online applications
- Screening, shortlisting and interview scheduling
- Candidate communication and status tracking
- Verification and appointment workflow
- Recruitment reporting, dashboards and audit trails
- Configurability for future re-use of platform capabilities

5.2.1 Municipal CRM Ecosystem

The CRM ecosystem shall serve as the central operational hub for municipal administration and must support the following capabilities:

- Comprehensive case management with lifecycle tracking
- Stakeholder and community relationship management
- Configurable departmental workflow orchestration
- Omnichannel communication integration
- SLA definition, monitoring, and breach management
- Multi-tier escalation workflows with automated routing
- Integrated reporting, analytics, and performance dashboards
- Task management with assignment, prioritisation, and resolution tracking
- Internal approvals and authorisation workflows
- Citizen engagement portals and self-service capabilities

5.3 Dashboards and Analytics

The solution must deliver a layered analytics architecture spanning executive, departmental, and operational levels:

- Executive dashboards with real-time institutional KPI visibility
- Departmental performance dashboards with configurable metrics
- Operational reporting for day-to-day process management
- Compliance analytics aligned to MFMA and regulatory requirements
- Service delivery analytics measuring citizen-facing performance
- Audit trail visibility and retrospective forensic reporting

5.4 Technical Architecture Requirements

The proposed technical architecture must be enterprise-grade, cloud-ready, and compliant with the Municipality's ICT governance framework. The following architectural layers are prescribed:

5.4.1 Front-End Components

- Responsive web portal accessible on desktop and mobile devices
- Role-differentiated user interfaces for applicants, HR administrators, and executives

5.4.2 Middleware and Integration Layer

- RESTful API gateway supporting third-party integrations
- Active Directory and LDAP integration for single sign-on
- Webhook and event-driven messaging for real-time data exchange

5.4.3 Back-End Infrastructure

- Centralised relational and document-oriented database management
- Configurable workflow and business rules engine
- Scalable analytics and reporting engine

5.4.4 Security Framework

- Role-based access control (RBAC) with least-privilege enforcement
- Data encryption in transit (TLS 1.3 minimum) and at rest (AES-256)
- Multi-factor authentication (MFA) for all privileged accounts
- Automated backup, business continuity, and disaster recovery protocols
- Comprehensive audit logging with tamper-evident records

5.5 Future Phases (Indicative / Optional but required as roadmap)

- Citizen complaints and service request management
- General municipal query management / contact centre logging
- Appointments and bookings
- Public participation submissions and notices
- Community service requests and notifications
- Selected permits / applications / forms
- Supplier / stakeholder self-service (optional future)
- Integration to billing, GIS or field operations (optional future)

6. Contracting Model

Bidders must price the platform in a phased and modular manner. Phase 1 pricing must be separated from future phase options.

The Municipality reserves the right to award Phase 1 only, or Phase 1 plus approved future phases, subject to budget, approvals and actual municipal priorities.

The selected platform must not lock the Municipality into procuring future modules exclusively from the vendor without transparent commercial terms. Bidders must disclose licensing, module dependency and extensibility assumptions.

7. Mandatory Bidder Submission Requirements

- Company registration and good standing details.
- Public sector and preferably municipal platform implementation experience.
- At least three reference clients for CRM / workflow/citizen engagement/recruitment or similar solutions.
- Detailed compliance response to this specification.
- Product architecture, hosting model and security overview.
- Phased implementation plan clearly showing Phase 1 and indicative future phases.
- Support model, SLA and escalation paths.
- Pricing schedule by phase, module and recurring cost component.
- Assumptions, exclusions, third-party dependencies and optional elements clearly stated.

8. Recommended Evaluation Framework (for SCM finalisation)

Functionality Criterion	Recommended Weight (%)	Assessment Focus
Platform fit for citizen-centric municipal services	20	CRM, portal, workflow and modularity
Phase 1 E-Recruitment compliance	25	Depth of recruitment functionality and readiness
Technical architecture and scalability	15	Hosting, security, integrations, extensibility
Municipal / public sector experience	10	Relevant references and complexity handled
Implementation methodology and roadmap	10	Phase approach, governance and timeline
Training and change management	5	Role-based training, adoption and handover
Support and SLA	10	Service desk, maintenance, uptime and escalation
Reporting, dashboards and mobile capability	5	Insights, analytics, future readiness and app approach

9. Governance and Project Structures

Governance Body	Suggested Composition	Primary Role
Project Steering Committee	Municipal Manager delegate, Corporate Services, HRM, ICT, Community Services, Planning, Technical, CFO delegate, SCM	Strategic direction, approvals and escalations
Phase 1 Working Group	HRM, ICT, recruitment process owners, vendor PM	Detailed design and delivery of e-recruitment
Platform Working Group	ICT, service owners for future modules, vendor architect	Platform roadmap, dependencies and standards
UAT Team	HR users, ICT and nominated business users	Scenario testing and acceptance recommendation

10. Deliverables

- Inception report and confirmed phased project plan
- Requirements confirmation and solution design documents
- Configured Phase 1 E-Recruitment module on the common platform
- Platform architecture and roadmap for future modules
- Configured reports, dashboards and templates
- Environment setup, testing artefacts and go-live pack
- Training material, user guides and support documentation
- Hypercare and support transition deliverables

Part B: Business Requirements Specification (BRS)

11. Business Problem Statement

The Municipality requires an integrated digital platform to engage residents, applicants and stakeholders in a more responsive and transparent manner while also supporting internal workflow and accountability. Point solutions do not provide a sustainable digital architecture for this need.

The immediate pain point is recruitment, which is why E-Recruitment is prioritised as Phase 1. However, the Municipality also requires CRM capability, a digital front door, reusable workflows and mobile enablement for future citizen-facing services.

12. Target Operating Concept

Layer	Purpose	Examples
Front Office	Citizen / applicant interaction channels	Web portal, mobile app, notifications, contact logging
Middle Office	Relationship and process orchestration	CRM, case management, workflows, document handling, reporting
Back Office	Operational systems and integrations	HR, records, email, directory, future billing/GIS interfaces

13. Business Outcomes

6. Provide a single digital front door for municipal interactions.
7. Improve applicant and citizen experience through online self-service and status visibility.
8. Create a central CRM and interaction history capability.
9. Enable reusable workflows for multiple municipal services over time.
10. Reduce manual administration and improve auditability and records management.
11. Create the basis for a municipal app and notifications-driven citizen engagement model.

14. Platform Modules

Module	Phase	Status / Intent
E-Recruitment	Phase 1	Mandatory for immediate implementation
Citizen CRM	Phase 1 foundation / Phase 2 operational expansion	Required as platform capability
Citizen Portal	Phase 1 foundation	Required for applicant/citizen access
Mobile App	Phase 1 foundation / Phase 2 feature expansion	Required as platform capability and rollout option
Complaints / Service Requests	Phase 2	Future service module
General Queries / Contact Centre Logging	Phase 2	Future service module
Appointments / Bookings	Phase 2 or 3	Optional expansion
Public Participation	Phase 2 or 3	Optional expansion
Other E-Services	Future	Roadmap-required capability

15. Phase 1 Functional Requirements – E-Recruitment

15.1 Vacancy Requisition and Approval

- Allow authorised managers to create requisitions for vacancies.
- Validate against approved establishment and required supporting documentation.
- Route approvals according to delegations and configured municipal workflow rules.

- Generate unique vacancy/requisition references and full audit trail.

15.2 Careers Portal and Vacancy Publication

- Publish approved vacancies to the citizen portal/careers portal.
- Support role descriptions, requirements, closing dates and application instructions.
- Support internal, external or combined advertising models.
- Allow future re-use of portal patterns for non-recruitment services.

15.3 Applicant Registration and Online Applications

- Enable secure applicant registration and profile management.
- Allow document uploads, declarations and vacancy-specific applications.
- Provide mobile-responsive application capability.
- Provide acknowledgement and application status tracking.

15.4 Screening and Shortlisting

- Support configurable minimum requirements, knockout questions and structured screening.
- Support shortlist panel workflows, scoring and reasons for exclusion.
- Maintain an auditable trail of decisions and comments.

15.5 Interview and Assessment

- Schedule interviews and send invitations.
- Support panel scoring, moderation and ranking.
- Support digital interview packs and assessment records.

15.6 Verification and Appointment

- Manage qualification, identity, reference and other required checks.
- Control progression to appointment based on mandatory checks and approvals.
- Generate recommendation and appointment documents from templates.

15.7 Recruitment CRM and Communications

- Keep a full applicant communication history.
- Allow reminders, outcome notices, interview invites and regrets.
- Provide applicant self-service status visibility and notification logging.

15.8 Recruitment Reporting

- Dashboards for vacancy status, cycle time, volumes and bottlenecks.
- Audit reports, user activity logs and compliance reports.
- Export to PDF, Excel and CSV.

16. Foundational Platform Requirements (Must exist from Phase 1 even if future modules are not yet activated)

16.1 Citizen Portal Foundation

- Single public-facing portal architecture for applicants and future citizens / stakeholders.
- Profile management, notifications, request status capability and content publishing.
- Responsive design suitable for web and mobile access.

16.2 CRM Foundation

- Store person / party records, interaction history, communication log and case references.
- Support applicants in Phase 1 and citizens / businesses in later phases.

- Role-based visibility and data privacy controls.

16.3 Workflow Foundation

- Configurable workflow engine reusable for recruitment and future service requests.
- Escalations, SLAs, task routing and approvals.
- Auditability and exception handling.

16.4 Mobile App Foundation

- Mobile application framework or capability forming part of the platform offering.
- At minimum, vendor must demonstrate how Phase 1 applicant-facing services can be consumed on mobile and how future citizen services can be activated via app without platform replacement.
- Push notification capability preferred.

16.5 Document and Records Foundation

- Attach, store and retrieve documents by entity / case / application.
- Metadata, access controls, retention and audit trail support.
- Support for official municipal records handling.

17. Future Phase Functional Requirements (Roadmap and architecture must cater for them)

17.1 Complaints and Service Requests

- Citizens must be able to lodge complaints and service requests through portal and mobile channels.
- Cases must be categorised, routed, tracked and escalated.
- Photo, location and evidence attachments should be supported in future phases.

17.2 General Municipal Queries

- Log and track walk-in, contact centre, email and portal queries.
- Provide citizen communication history and resolution tracking.

17.3 Appointments and Bookings

- Support bookings for selected services or consultations.
- Provide reminders and rescheduling capability.

17.4 Public Participation and Notices

- Support digital publication of notices, engagements and submissions.
- Allow citizens to submit feedback or responses where approved.

17.5 Additional E-Service Forms

- Future online applications, permit requests or digital forms should be configurable on the same platform.
- Form and workflow configuration should not require a new platform investment.

18. User Roles

Role	Phase 1 Relevance	Future Relevance
System Administrator	Manage platform users, roles and settings	Manage all modules and environments
HR Administrator / Recruitment Officer	Primary Phase 1 user	May continue for recruitment only
Hiring Manager / Panel User	Phase 1 recruitment process user	N/A or limited future use
Citizen / Applicant	External Phase 1 portal user	Future citizen portal/app user

CRM / Case Officer	Limited in Phase 1 foundation	Primary future citizen service user
Contact Centre / Front Desk User	Optional in Phase 1	Primary future logging and support role
ICT Administrator	Phase 1 technical support and integration	Platform-wide technical ownership
Auditor / Read-Only Reviewer	Access reports and audit trails	Platform governance oversight

19. Non-Functional Requirements

19.1 Security and Access Control

- Role-based access control and segregation of duties.
- MFA support for privileged users.
- Encryption in transit and at rest.
- Audit logs for all critical actions.

19.2 Privacy and POPIA

- Privacy notice, consent capture where required and controlled access to personal data.
- Data retention, minimisation and secure disposal controls.
- Operator/subprocessor transparency for hosted services.

19.3 Performance and Scalability

- Support for peak recruitment volumes in Phase 1.
- Scalable to future citizen transaction volumes and modules.

19.4 Availability and Continuity

- Target availability of at least 99.5% during agreed service windows.
- Backup, recovery and disaster recovery capability with stated RPO/RTO.

19.5 Usability and Accessibility

- Simple user journeys for applicants and future citizens.
- Mobile-friendly and low-bandwidth considerate design.

19.6 Configurability

- Workflow, forms, templates and service categories must be configurable for future phases without major redevelopment.

20. Technical Architecture Requirements

- Browser-based, modular architecture with API-ready integration capability.
- Separation of environments: DEV, TEST, UAT and PROD.
- Public portal layer, application/workflow / CRM layer and data layer.
- Support for web and mobile channels on the same platform foundation.
- Ability to enable additional modules without procuring a new core platform.

21. Integration Requirements

- Municipal identity/directory service for internal users where feasible.
- Municipal email platform and notification services.
- Municipal website integration for portal publishing or redirection.
- HR and records systems at least for Phase 1 hand-offs where approved.
- Future support for other service systems such as billing, GIS or contact centre tools.

In addition to the core CRM and recruitment capabilities, the Municipality requires that the proposed solution incorporate or integrate with a comprehensive Integrated Data and Intelligence Platform. This platform directly addresses the challenge of fragmented institutional data by establishing a single, authoritative source of operational and financial truth across all systems.

The platform is structured around three interdependent functional pillars, each of which must be demonstrably deliverable by the bidder as either a native component or a formally certified integration:

Pillar I Universal Data Hub and Enterprise Data Warehouse

The data hub must ingest structured and unstructured data from heterogeneous source systems, including relational databases, document stores, ERP platforms, legacy operational systems, and third-party APIs, without requiring rip-and-replace replacements of existing infrastructure. Core capabilities include:

- Normalisation of ingested data into a canonical golden-record layer
- Automated conflict resolution and deduplication at the point of ingestion
- Scalability to enterprise data volumes with no degradation in query performance
- Support for real-time and scheduled data pipeline execution
- Full data lineage tracking from source system to reporting layer

Pillar II Intelligent Reporting and Business Intelligence

The reporting layer must transcend conventional scheduled batch exports and provide live, certified reporting across financial, operational, and regulatory domains. Requirements include:

- Annual financial statements and management accounts generated from consolidated data
- Operational and KPI dashboards with drill-down capability to transactional level
- Regulatory and compliance reports aligned to MFMA, POPIA, and sector-specific frameworks
- On-demand custom report generation accessible to authorised users without technical intermediaries
- Every report underpinned by a complete, immutable audit trail

Pillar III AI-Powered Document and Records Management Hub

The document and records management component must govern the complete institutional information lifecycle, from creation through to retention compliance and eventual disposal. Prescribed capabilities include:

- AI-powered document capture, automated classification, and intelligent metadata tagging
- End-to-end document lifecycle management including version control and approval workflows
- Automated retention scheduling and disposal rules aligned to legislative requirements
- Instant retrieval via intelligent search across all document classes and metadata fields
- Full audit trail on every document event, recording the user, action, timestamp, and version
- Agentic learning capability enabling the system to continuously improve classification accuracy

The integration of this platform with the Municipal CRM Ecosystem will deliver a unified institutional intelligence environment in which financial reporting, operational management, citizen service delivery, and document governance are governed from a single, coherent digital infrastructure, eliminating the manual reconciliation burden that currently constrains the Municipality's administrative capacity.

22. Data and Records Requirements

Data Domain	Phase 1 Requirement	Future Re-use
Applicant / Citizen Profile	Store applicant identity, contact and communication history	Expand to citizen / stakeholder master
Cases / Applications	Recruitment applications and workflow states	Complaints, queries and e-service cases
Documents	CVs, adverts, appointment records	Evidence, service documents and attachments
Audit Trails	User actions and recruitment events	All modules and service transactions
Reports	Recruitment operational dashboards	Cross-service dashboards and citizen insights

23. Reporting Requirements

Report / Dashboard	Phase 1 Mandatory	Future Use
Recruitment pipeline dashboard	Yes	Recruitment only
Vacancy cycle time report	Yes	Recruitment only
Applicant communication log	Yes	May evolve into citizen communication history
Audit trail report	Yes	All future modules
CRM interaction dashboard	Foundation only in Phase 1	Full use in future phases
Service request/complaint dashboard	No	Future phase

24. Implementation Approach

24.1 Phase 1 – E-Recruitment Implementation

12. Platform foundation setup
13. Portal and applicant profile capability
14. Recruitment workflow configuration
15. Templates, reports and dashboards
16. Testing, training and go-live

25. Indicative Timeline

Phase	Indicative Duration	Notes
Phase 1 Discovery and Design	3–5 weeks	Includes platform and recruitment requirements confirmation
Phase 1 Build and Configuration	6–10 weeks	Platform foundation and e-recruitment module
Phase 1 Testing and Training	3–5 weeks	Includes UAT and readiness
Phase 1 Go-Live and Hypercare	2–4 weeks	Recruitment goes live on platform
Future Phases	To be scheduled	Subject to approvals, budget and priorities

26. Acceptance Criteria

- Phase 1 recruitment scenarios pass UAT and agreed defects are resolved or accepted under concession.
- The platform foundation for portal, CRM, workflow and reporting is demonstrably in place.
- Security, access control, privacy and audit trail requirements are demonstrated.
- Training and handover are completed.
- Roadmap and extensibility for future phases are clearly documented and accepted.

27. Risk Register – Initial View

Risk	Impact	Mitigation
Platform procured as de facto point solution	Future services cannot be added efficiently	Require modularity and roadmap evidence
Phase 1 consumes all design effort without future foundation	Costly rework later	Mandate foundational CRM/portal/workflow capability in Phase 1
Over-customisation during recruitment phase	Complex support and high cost	Prefer configuration and common services
Poor adoption by internal and external users	Low realised value	Training, change management and simple UX
Insufficient integration and records design	Audit and operational gaps	Early architecture review and records requirements validation

28. Pricing Schedule Requirements

- Separate pricing for platform foundation, Phase 1 recruitment module and each future module/phase.
- Separate once-off implementation, licensing/subscription, hosting, support and optional costs.
- Rate card for future configuration/change requests.
- Five-year indicative total cost of ownership preferred.

29. Vendor Compliance Matrix Instructions

Bidders must respond to each requirement using the following codes and provide comments/evidence:

Response Code	Meaning
C	Comply out-of-the-box
CR	Comply through configuration
CU	Comply through customisation
TP	Comply through third-party integration/component
NC	Does not comply
NA	Not applicable (must be justified)

30. Conclusion

This TOR/BRS defines a broader municipal digital service platform while preserving E-Recruitment as the immediate Phase 1 priority. It gives Thulamela Local Municipality a practical path to address an urgent operational need without losing the longer-term digital service vision.

The successful bidder must therefore demonstrate both immediate recruitment capability and a credible, reusable, citizen-centric platform foundation capable of supporting future municipal digital services and a mobile application.

31. Evaluation Criterion 1

Functionality will be scored out of 100%, and bidders scoring below 70% will not be considered for further evaluation.

Evaluation Criterion (Relevant degree is 3years IT, BCom, & related)	Total Points Allocated
Project Personnel (Qualifications and Curriculum Vitae)	55
SABSA Certificate; 10 or more years of enterprise implementation lead and governance, experience on comparable projects, with relevant Degree.	20
CISSP Certification; 0 to 5 years of Cybersecurity experience.	15
Project Manager, Project Management Certificate (PMP/Prince 2); 4 to 7 years of enterprise implementation experience, with relevant Degree.	10
Implementation and Training Lead, demonstrated municipal or public sector facilitation and transformation experience & IT degree or equivalent; 0 to 5 years in comparable roles with relevant degree	5
Support and Technical Implementation Team experience, & IT degree or equivalent; 2 or more years of relevant technical experience	5
Implementation Methodology	25
Structured implementation methodology with milestones and quality gates	5
Demonstrated understanding of the municipal operating environment	5
Governance and compliance approach, including POPIA and MFMA alignment	5
Change management strategy and structured training programme	5
Support and sustainability model for the post-implementation period	5
Relevant Implementation Experience	10
Two or more formal reference letters on official Letterhead from similar projects confirming comparable implementations – [5 each]	10
Solution Demonstration Document	10
Comprehensive and professionally presented demonstration document covering all prescribed modules in line with Paragraph 5	10
Partially presented demonstration document with significant gaps	5
TOTAL	100

Thulamela Local Municipality reserves the right to accept or reject any bid, in whole or in part, without providing reasons, in accordance with applicable procurement legislation.

ADDITIONAL CRITERION THAT MAY BE USED FOR FURTHER EVALUATION

Annexure A: Suggested Phase 1 Demonstration Script

17. Create and approve a vacancy requisition.
18. Publish a vacancy to the portal.
19. Register an applicant and submit an application.
20. Perform screening and shortlisting.
21. Schedule interviews and capture scores.
22. Show applicant communications and dashboard reporting.
23. Demonstrate the CRM / portal/workflow foundation and how future services would be activated.

Annexure B: Suggested Future-Service Demonstration

24. Demonstrate how a citizen complaint can be configured on the same platform.
25. Demonstrate future app usage or app framework for issue logging and notifications.
26. Show reuse of profiles, cases, workflows, reports and notifications across services.

Annexure C: Suggested UAT Scenarios for Phase 1

Scenario ID	Scenario Description	Expected Outcome
UAT-01	Create and approve vacancy requisition	Configured workflow routes correctly
UAT-02	Applicant submits online application	Acknowledgement and profile history are created
UAT-03	HR screens using minimum criteria	Outcome and reasons are recorded
UAT-04	Interview process is completed	Scores and moderation are stored
UAT-05	Generate recruitment dashboard	Operational report is correct
UAT-06	Demonstrate platform foundation	Portal, CRM and workflow capability are visible for future use

Annexure D: Suggested Future Phase Roadmap Template

Future Workstream	Purpose	Indicative Timing
Citizen complaints/service requests	Improve responsiveness and issue tracking	Phase 2
Citizen mobile app expansion	Broader mobile engagement and notifications	Phase 2/3
Appointments / bookings	Digital scheduling of selected services	Phase 2/3
Public participation	Submissions, notices and interactions	Phase 2/3
Additional e-services	Modular municipal forms and workflows	Future

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32. Reference

The following is a statement of similar work carried out by the company/ies in the last five (5) years:

Employer, Contact person and telephone number	Description of contract	Value of work inclusive of VAT (Rand) if applicable	Date Completed