



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA



westcol
Western College for Technical, Vocational Education and Training

WESTERN TVET COLLEGE

Herein referred to as (WESTCOL)

**REQUEST POTENTIAL BIDDERS FOR PROPOSALS (RFP) FOR THE
ESTABLISHMENT, MAINTENANCE AND SUPPORT OF RECORDS MANAGEMENT
SYSTEM FOR A PERIOD OF THIRTY-SIX (36) MONTHS, SIX (06) MONTHS OF
MAINTANANCE AND SUPPORT ON AN AS-AND-WHEN REQUIRED BASIS**

Tender No: PU8111/080

Prospective Suppliers who are interested in participating in the aforementioned tender are invited to submit a proposal in full compliance to the requirement of this tender document. Completed documents with all attachments must be signed and submitted on the **PURCO SA Website**.

TENDER DOCUMENTS:

The closing time and date for receipt for online tender **PU8111/080** is at 11h00 AM on **Monday, 12 October 2026**.

Tender number	PU8111/080	
Date issued	11 September 2026	
Tender closing date	12 October 2026	11h00 am
	Tender Submission will be Electronic on www.purcosa.co.za Supplier Hub- Online Tender Submission Guide	
Non-compulsory Information Session	21 September 2026	12h00 am
	An online non-compulsory briefing session will be facilitated via MS Teams	

Company name		
Address		
Contact person	Mr/Mrs/Ms/Dr/Prof.	
Contact numbers	(w)	(cell)
Email address		

1.1.1 PRE-QUALIFICATION/MANDATORY INFORMATION REQUIREMENT

The Pre-qualification/Mandatory Information Requirement phase validates the tenderers' compliance with the legal requirements to conduct business in SA, as well as to specific industry requirements for the supply of services where applicable.

Please see table below for the list of mandatory requirements and tick yes if documentation is submitted and no if not submitted.

Description	Requirement	YES	NO
RFP Document	Each page of the RFP document to be initialled by a delegated representative	Yes	No
Completed Technical specifications and pricing	Attach fully signed technical specifications and pricing (Don't change the pricing schedule and specification)	Yes	No
Proof of Bank Account	Signed or electronically stamped letter from bank (not be older than 6 months)	Yes	No
Company registration documents	Submit copy of company registration documents	Yes	No
Tax Compliance Certificate	Copy of valid SARS Tax compliance status (must be valid on the tender closing date)	Yes	No
B-BBEE Certification	A valid B-BBEE certificate from a SANAS accredited agency/Affidavit	Yes	No
Board resolution	Submit a copy of signed board resolution. Unless if you are sole proprietor	Yes	No
ID documents	Certified copy(s) of Identity Document(s) (ID) for directors/shareholders (not be older than 6 months)	Yes	No
Declaration of Interest	Please sign point 9 of this tender document	Yes	No
Bank Rating Letter	Letter of Good Standing from the bank (Bank Rating Letter) (not be older than 6 months)	Yes	No
Registration National Treasury (CSD)	Provide a copy of the full report of registration on National Treasury Central Supplier Database.	Yes	No
COIDA	Submit valid letter of good standing from the department of labour	Yes	No
SBD Forms	Copy of completed and signed SBD 1, SBD 4, SBD 5, SBD 6.1	Yes	No

NB: No points will be allocated to this phase; however, tenders that do not meet the pre-qualification requirements may not advance to the next phase of the evaluation process.

1.1.2 STAGE 1: EVALUATION OF FUNCTIONALITY

The below mentioned criteria regarding Functionality is required for responsiveness and therefore eligibility for the next stage of evaluation. This is done to determine the ability of each tenderer to successfully execute the contract according to specifications. Failure to score minimum of 70 out of 100 points will lead to non-compliance and non-responsiveness.

These criteria shall only determine whether a tender will further be evaluated and will not influence the points scored on Price. If any criterion is rated zero (0) points, the tenderer will be rejected, even if the required 70 out of 100 points are achieved.

For purposes of comparison and in order to ensure meaningful evaluation, bidders are requested to furnish detailed information in substantiation of compliance to functionality.

FUNCTIONALITY CRITERIA		POINTS ALLOCATED
Experience Experience, Skills and Ability of Service Provider to fulfil Western TVET College requirements, past experience in work of similar nature. The service provider must have at least 5 years' experience of providing Records Management System to higher educational institutions. Provide verifiable written references: • 3 written verifiable references • 2 written verifiable reference • 1 written verifiable reference Must have knowledge of the higher education and training environment and must have been involved in the servicing of such institutions relating to Records management system.	= 50 Points = 40 Points = 30 Points	50
Project Team Project team comprising skilled officials to successfully complete the project. Service providers must attach certified copies of Qualification and CV of the technicians. 4 or more Certified Technicians 3 - Certified Technicians 2 - Certified Technicians • The bidder will be required to provide a detailed description of the system offered. The needs analysis system <u>under the scope of work /specification list</u> will be used for this evaluation. Core Functional Requirements: • 3 Year experience in Records Management System Implementations	= 30 Points = 20 Points = 10 Points	30

• Technical Capability of Proposed Solution • Compliance with Functional Requirements • Project Methodology and Implementation Plan • Support and Maintenance Approach • Training and Knowledge Transfer Plan Technical Specifications: • Be web-based and accessible through modern browsers. • Support cloud, hybrid, or on-premises deployment. • Be scalable across all Western TVET College campuses. • Support Microsoft Windows environments. • Support Microsoft Office 365 integration. • Support Outlook email capture and filing. • Provide API integration capabilities. • Support mobile and remote access. • Provide automated backup and recovery functions. Supported Operating Systems: • Microsoft Office 365. • Microsoft Outlook. • Active Directory. • Existing College ERP systems. • Student Information Management Systems. • Human Resource Management Systems. • Financial Management Systems. • Procurement and SCM systems. • SharePoint (if applicable). Deployment Options: • Cloud-Based: For ease of scalability and maintenance. • On-Premises: For institutions with in-house IT infrastructure. • Hybrid: Combines cloud functionality with on-premises control Support and Maintenance: • 24/7 technical support via chat, email, or phone. • Regular software updates for new features and security patches. • Detailed user manuals and video tutorials. • Training for lecturers, IT support staff and administrators. Licensing and Pricing: • Flexible licensing models (per user, per device, or institutional). • Transparent pricing with options for add-ons like advanced analytics. • Discounts for multi-year commitments or educational partnerships		
Provide portfolio of evidence for Records Management System done at one higher education institution	= 20 Points	20
Total Points		100

1. PURPOSE

The purpose of this project is to establish a comprehensive Records Management System for Western TVET College by organizing, classifying, indexing, storing, and managing both physical and electronic records in accordance with applicable legislation, records management standards, and institutional policies.

2. OBJECTIVES

The appointed service provider shall:

- Conduct a records audit across all campuses and sites.
- Collect and centralize records from identified sites and offices.
- Sort, classify, arrange, and file records according to approved file plans.
- Capture and index records manually and electronically.
- Establish a functional records management system for both physical and digital records.
- Supply and install records storage infrastructure.
- Develop records management procedures and guidelines.
- Conduct skills transfer and training for designated Western TVET College officials.

3. SCOPE OF WORK

3.1 Records Audit and Assessment

The service provider shall:

- Conduct a comprehensive assessment of existing records at all campuses and satellite sites.
- Identify active, semi-active, and inactive records.
- Determine records volumes, formats, and storage requirements.
- Produce a Records Audit Report with recommendations.
- Disposal inactive record in line with applicable regulations

3.2 Collection and Consolidation of Records

The service provider shall:

- Collect records from all identified sites and offices.
- Transport records safely to designated records storage areas.
- Ensure records are handled in accordance with records management standards.
- Maintain a chain-of-custody register during movement of records.

3.3 Sorting, Classification and Arrangement

The service provider shall:

- Sort records according to business functions and activities.

- Remove duplicate and non-record materials where applicable.
- Arrange records in accordance with an approved file plan.
- Label files, folders, boxes, shelves, and storage locations.

3.4 File Creation and Filing

The service provider shall:

- Create and open files where required.
- Arrange documents chronologically and systematically.
- Establish filing procedures for incoming and outgoing correspondence.
- Implement standardized file numbering and referencing systems.

3.5 Records Capturing and Indexing

The service provider shall:

Manual Records

- Capture file details into a records register.
- Develop file indexes and location registers.
- Create file tracking and retrieval mechanisms.

Electronic Records

- Capture metadata for all identified records.
- Index records according to approved classification structures.
- Create searchable electronic registers.
- Migrate approved records into the electronic records management environment.

3.6 Electronic Records Management System

The service provider shall:

- Configure and implement an Electronic Records Management System (ERMS) or optimize the existing system.
- Develop user profiles, permissions, and security controls.
- Configure indexing and search functionality.
- Establish backup and recovery procedures.
- Ensure compliance with records management legislation and data protection requirements.

3.7 Supply and Installation of Storage Infrastructure

The service provider shall:

Supply and install:

- Filing cabinets.
- Fire-resistant records cabinets where required.
- Shelving systems.
- Archive boxes.
- File folders and dividers.
- Labels and barcode systems where applicable.

Installation shall include:

- Site preparation.
- Cabinet positioning and installation.
- Storage layout planning.
- Records room optimization.

3.8 Development of Records Management Tools

The service provider shall develop:

- File Plan.
- Records Classification System.
- Records Retention Schedule.
- Records Disposal Schedule.
- Records Management Procedures Manual.
- Records Registry Operational Guidelines.
- Records Tracking Register.
- Records Transfer and Disposal Forms.

3.9 Training and Skills Transfer

The service provider shall:

- Conduct practical training for designated officials.
- Train registry personnel and records custodians.
- Provide user manuals and standard operating procedures.
- Conduct hands-on coaching during implementation.
- Transfer knowledge on:

- Filing procedures.
- Records classification.
- Records indexing.
- Electronic records management.
- Records retention and disposal.
- Registry administration.

4. DELIVERABLES

The service provider shall provide:

1. Records Audit Report.
2. Records Classification System.
3. Approved File Plan.
4. Records Retention Schedule.
5. Records Disposal Schedule.
6. Physical Records Registry.
7. Indexed Physical Files.
8. Electronic Records Register.
9. Configured Electronic Records Management System.
10. Installed Storage Infrastructure.
11. Records Management Policies and Procedures.
12. Training Materials.
13. Skills Transfer Report.
14. Final Project Close-Out Report.

5. PROJECT DURATION

The project shall be implemented over a period of 36 months from the date of appointment.

6. REPORTING

The service provider shall submit:

- Inception Report.
- Monthly Progress Reports.
- Training Reports.

- Final Implementation Report.

7. MINIMUM REQUIREMENTS FOR SERVICE PROVIDER

The service provider must demonstrate:

- Proven experience in records management projects.
- Experience in implementing electronic records management systems.
- Qualified records management practitioners.
- Knowledge of National Archives and Records Service requirements.
- Experience within public sector institutions.
- Capacity to provide training and skills transfer.

8. SUCCESS CRITERIA

The project shall be deemed successful when:

- All identified records have been collected and organized.
- Physical records are properly classified, indexed, and stored.
- Electronic records are captured and searchable.
- Storage infrastructure has been installed and operational.
- Staff have been trained and are capable of managing the system independently.
- Western TVET College has a fully functional and sustainable records management system.

10. PRICING SCHEDULE

PRICING SCHEDULE A				
Item No.	Description	Unit	Quantity	Unit Price (Incl. VAT)
1.	Supply and implementation of Records Management System solution	Once-off	1	R
2.	System configuration and customisation according to organisational requirements	Once-off	1	R
3	Data assessment, cleansing and migration from existing records systems	Once-off	1	R
4	System integration with existing ICT platforms (where applicable)	Once-off	1	R
5	User acceptance testing and system commissioning	Once-off	1	R

6	Provision of user manuals, technical manuals and system documentation	Once-off	1	R
7	End-user training	Session	-	R
8	System administrator training	Session	-	R
9	Records Management System licences/subscription fees	36 Months	1	R
10	System updates, patches and upgrades	36 Months	1	R
11	Technical support and maintenance services (Months 1–6)	6 Months	1	R
12	Additional maintenance and technical support after completion of 36 -month contract period	6 months	1	R
13	Additional system updates, patches and support services during maintenance period	6 months	1	R
Subtotal (INCL. VAT)				R

PRICING SCHEDULE B	
Description	TOTAL PRICE (INCL. VAT)
Implementation and Deployment	R
Training and Documentation	R
36 Month Licensing, Support and Maintenance	R
6-Month Maintenance Period	R
Total Contract Price (Incl. VAT)	R

Description	TOTAL PRICE (INCL. VAT)
PRICING SCHEDULE A (INCL. VAT)	R
PRICING SCHEDULE B (INCL. VAT)	R
TOTAL BID PRICE (INCL. VAT) FOR THIRTY-SIX (36) MONTHS	R

Signature of person authorized to sign a tender: _____ Date: _____