



NATIONAL LIBRARY OF SOUTH AFRICA

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TERMS OF REFERENCE FOR THE PROCUREMENT OF A CLOUD-BASED MARKETING COMMUNICATION SOFTWARE AND AN ONLINE FORM BUILDER WITH WORKFLOW AUTOMATION (LICENCED FOR 24 MONTHS).

CLOSING DATE: 21 March 2025

TIME: 11:00

NB: All proposal/quotation must be submitted to Quotations@nlsa.ac.za, kindly note that failure to submit via this email address will result in your proposal /quotation being rejected and disqualified.

1. BACKGROUND

The National Library of South Africa (NLSA) is a premier African institution tasked with the collection, preservation, and dissemination of South Africa's national documentary heritage. As a custodian of this heritage, NLSA promotes awareness, appreciation, and access to published works both nationally and internationally, contributing significantly to the country's cultural development and prosperity. The NLSA operates from its campuses located in Pretoria and Cape Town.

The NLSA seeks to appoint a company for the procurement of a cloud-based marketing communication software and an online form builder with workflow automation (licensed for 24 months).

2. SCOPE OF WORK

1. A 24-month subscription for cloud-based marketing communication software suite with email marketing, transactional email, marketing automation, and customer-relationship management.

The suite should be able to provide the following:

1.1 Campaigns

- Email campaigns
- Drag and drop editor

- Email template gallery
- SMS marketing
- Email & SMS personalization
- Advanced templating language
- No daily sending limit
- Landing page builder
- A/B Testing
- Predictive sending AI

1.2 Transactional platform

- Transactional email sending
- Core API features
- Real-time email statistics
- Custom webhooks
- Customized log retention

1.3 Automation

- Workflow editor
- Page tracking
- Marketing automation

1.4 Contact management

Up to 2 million contacts

1.5 Reporting

- Geography and device reporting
- Advanced open & click stats

1.6 Phone

- Free phone number
- Worldwide calling
- Call statistics
- Contacts click-to-dial

1.7 Meetings

- Customized booking pages
- In-browser video calling
- Calendar synchronization

- Meeting reminders

1.8 Integrations and support

- Plugins
- GDPR compliance
- Email support (Microsoft Office 365)
- Phone and chat support

2. A 24-month subscription for an online Form Builder with Workflow Automation. The application must allow one to build and publish online forms and conduct online surveys.

The form builder should be able to provide the following:

2.1 Data collection

- File Uploads
- Multi-Page Forms
- Rating Scales
- Repeating Sections
- Electronic Signatures
- Removable Cognito Forms Branding
- Save & Resume
- Table Field
- Lookup Field
- Person Field

2.2 Workflow Automation

- Calculations
- Conditional Logic
- Notifications
- Quantity Limits
- Email Attachments
- Multiple Email Notifications
- Resend Email Notifications
- Auto-Create Entries
- Verified Email Domains
- Workflow Links
- Workflow Tasks

2.3 Data Management

- Exporting
- Bulk Actions
- Bulk File Downloads
- Form Folders
- Importing
- Saved Entry Views

2.4 Security & Compliance

- Authenticated Forms
- Data Encryption

2.5 Integrations

- Address Autocomplete
- Cognito Forms API
- Google Analytics
- JSON Webhooks
- Make
- Microsoft Power Automate
- Zapier

2.6 Online Payment

- Stripe Payments
- Card on File
- PayPal Payments
- Square Payments

3 NLSA'S RIGHTS

The NLSA is entitled to amend any Bid condition, Bid validity period, Bid terms of reference, or extend the Bid's closing date, all before the tender closing date. All Bidders, to whom the Bid documents have been issued and where the NLSA have record of such Bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the NLSA's website under the relevant Bid information. All prospective Bidders must, therefore, ensure that they visit the website regularly and before they submit their Bid response to ensure that they are kept updated on any amendments in this regard.

4 DURATION OF THE PROJECT

4.1 The appointed service provider shall make an undertaking that the delivery shall be concluded within 30 days after issuing the Purchase Order.

5 CONDITIONS OF RFQ

5.1 The NLSA reserves the right not to accept the lowest proposal.

5.2 The NLSA reserves the right to appoint one or more Bidders.

5.3 The NLSA reserves the right not to award the contract.

5.4 The NLSA reserves the right to have any documentation, submitted by the successful Bidder checked or inspected by any other person or organisation.

5.5 The NLSA will not be held responsible for any costs incurred by the Bidder in the preparation and submission of the RFQ.

5.6 No upfront Payment will be done by NLSA.

5.7 The quotation is valid for a period of 30 days and may be extended at the discretion of the NLSA.

6 EVALUATION CRITERIA

6.1 Pre evaluation (standard bid documents)

6.1.1 Fully completed, SBD 4, SBD 6.1, forms.

6.1.2 The bidder must be registered on the Central Supplier Database (CSD).

6.1.3 Detailed quotation confirming that the technical specification as per the scope of work will be met.

6.2 Evaluation stage one (1): Technical Evaluation

N/A

Only those service providers/contractors who responded exactly as per the scope of work and to the satisfaction of the NLSA shall be considered.

6.3 Preference Point System

6.3.1 In terms of Regulation 5 of the Preferential Procurement Regulations of 2022/23, Gazette Number 47452 dated 4 November 2022 pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated by the State on the 80/20-preference point in terms of which points are awarded to bidders based on:

- The bid price (maximum 80 points)

- Specific Goals (maximum of 20 points)

The following formula will be used to calculate the points out of 80 for price in respect of an invitation for a tender, inclusive of all applicable taxes.

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where-

P_s = Points scored for price of tender under consideration;

P_t = Price of tender under consideration; and

P_{min} = Price of lowest acceptable tender.

- **Specific Goals (maximum of 20 points)**

Based in Gauteng = 20 points

Based outside of Gauteng = 10 points

Please note that CSD registration will be used to verify locality.

7 ENQUIRIES

All enquiries regarding this RFQ must be directed to the SCM Office:

For any RFQ related enquiries please email RFQ related enquiries, quoting the RFQ reference number and Bid description, to Judy.Moshige@nlsa.ac.za and quotations@nlsa.ac.za or call (012) 401 9766 during office hours.