

# TRANSNET SOC LTD

## SCOPE OF WORK

### AGILE PROJECT MANAGEMENT METHODOLOGY

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SCOPE OF WORK	
FOR THE PROVISION OF A SERVICE PROVIDER TO REVIEW THE TRANSNET PROJECT MANAGEMENT METHODOLOGY (PLP), RECOMMEND AND REVISE THE PROJECT LIFECYCLE PROCESS (PLP) PRINCIPLES AND ARTEFACTS FOR A PERIOD OF 12 (TWELVE) MONTHS	
Tender Number:	

## DOCUMENTATION INFORMATION SHEET

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NAME & SURNAME	JOB TITLE	CAPACITY / FUNCTION	SIGNATURE	DATE
Prepared By: Mr Avesh Bridgmohan		Process Owner		

NAME & SURNAME	JOB TITLE	CAPACITY / FUNCTION	SIGNATURE	DATE
Recommended By: Ms Christelle van der Merwe		Sponsor Rep		
Comments:				
FINAL APPROVAL:	NAME & SURNAME As Per DoA	ROLE	SIGNATURE	DATE
	Mr Mokgema Mongane	GM: Capital Development and Assurance (Sponsor)		
Comments:				

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## 1 ACRONYMS

### 1.1 Acronyms

ACRONYM	DEFINITION
<b>BBBEE</b>	Broad Based Black Economic Empowerment
<b>CCPC</b>	Critical Capital Project Controls
<b>CoE</b>	Centre of Excellence
<b>CP</b>	Control Points
<b>DPP</b>	Detailed Procurement Procedure
<b>FEL</b>	Front-end Loading
<b>FIDPM</b>	Framework for Infrastructure Development and Procurement Management
<b>GR</b>	Gate Review(s)
<b>ICPAF</b>	Integrated Capital Projects Assurance Framework
<b>IDM</b>	Infrastructure Delivery Processes
<b>MVP</b>	Minimum Viable Product
<b>OD</b>	Operation Division
<b>OM</b>	Operations & Maintenance
<b>PCP</b>	Project Control Plan
<b>PFMA</b>	Public Finance Management Act
<b>PLP</b>	Project Lifecycle Process
<b>PSCM</b>	Procurement and Supply Chain Management)
<b>SME</b>	Subject Matter Expert
<b>TCC</b>	Transnet Corporate Centre
<b>TE</b>	Transnet Engineering
<b>TFR</b>	Transnet Freight Rail
<b>TNPA</b>	Transnet National Ports Authority
<b>TP</b>	Transnet Property
<b>TPL</b>	Transnet Pipelines
<b>TPT</b>	Transnet Port Terminals

**Table 1: Acronyms**

## 2 BACKGROUND

- 2.1 Transnet SOC Limited is a Public Company, wholly owned by the Government of South Africa and is the custodian of Rail, Ports, Port Terminals and Pipelines. Transnet is responsible for enabling the competitiveness, growth and development of the South African Economy through delivering reliable Freight Transit and Handling Services that satisfy Customer demands.

- 2.2 The Company's Strategy Direction and Strategic Imperatives are expressed through their Segment Strategy which consist of 8 key Cargo Logistic Supply Chains and related to the 5 (Five) Strategic Pillars, as follows:
- Safety
  - Customer Service
  - Asset Utilisation
  - Cost Control
  - People
- 2.3 Transnet SOC Ltd comprises of Transnet Group and 6 (Six) Operating Divisions (ODs), as follows:
- Transnet Engineering (TE)
  - Transnet Freight Rail (TFR)
  - Transnet National Ports Authority (TNPA)
  - Transnet Pipelines (TPL)
  - Transnet Port Terminals (TPT)
  - Transnet Property (TP)
- 2.4 The Transnet Group Strategy Planning Department oversees the Capital Portfolio which is mostly composed of Infrastructure (Build / Construction Environment) Programmes and Projects. The 2020 / 2021 Financial Year Budget for the Portfolio is in excess of R10 Billion and the Portfolio consists of more than 300 Capital Programmes and Projects.
- 2.5 Within the Transnet Group Strategy & Planning Department resides the Capital Governance Centre of Excellence (CoE) which establishes, maintains, advises and trains on Good Practices for Portfolio, Programme and Project Management. These Practices are compiled in form of Policies, Frameworks, Methodologies, Manuals, Procedures and Processes, etc. (Capital Governance Universe).
- 2.6 Each Transnet OD possesses a Capital Execution Function by which Capital Programmes and Projects are Planned and Executed according to the approved Practices.

### 3 INTRODUCTION

- 3.1 In 2008, Transnet developed a Project Management Methodology, called the Project Lifecycle Process (PLP), based on the Project Management Institute (PMI) Standard for Project Management. The PLP Methodology is a "Waterfall" approach that designs a Solution through progressive elaboration and is applied to infrastructure (Build / Construction Environment) projects. The Project Phases are referred to as Front-End-Loading (FEL) and the Outputs are assured at an End-of-Phase Gate Review.

- 3.2 With the speed of Business constantly accelerating, Time to Market and Return on Investments have become increasingly important. The speed of change in Business is shrinking the Benefit Stream for many Projects, thereby requiring Projects to be completed as quickly as possible to take advantage of incremental Benefits.
- 3.3 Whilst the PLP has served Transnet for many years in delivering Capital Projects, the current Corporate imperative requires faster delivery of Capital Projects to meet the growing Customer Needs and realise the Corporate Strategic Objectives and Transnet Mandate.
- 3.4 Accordingly, the PLP must be analysed and revised to enable rapid, efficient Project Delivery. The Agile PLP should be packaged in a Digital Solution for ease of access, faster Execution, improved transparency and reduced co-ordination losses.

## 4 TRANSNET PROJECT LIFECYCLE PROCESS (PLP)

- 4.1 The PLP is Waterfall Methodology with ensuing Front-End-Loading (FEL) Phases, which include:
  - 4.1.1 **"Concept":**

A broad Concept is developed and tested whereby a number of Options are generated in order to implement the Requirement.
  - 4.1.2 **"Pre-feasibility":**

The Pre-feasibility Phase requires the identification of the Strategic Need / Opportunity for undertaking the Project. Furthermore, this Phase requires a comprehensive Pre-feasibility Study detailing the number of Options / Trade-off Studies that were assessed prior to selecting the most Viable Option based on Financial Analysis, realistic assumptions of Technical, Engineering, Operations, Economic Factors and other relevant Factors. Consequentially, if the selected Option is not viable against the initial Business Case, this may result in Project Close-Out.
  - 4.1.3 **"Feasibility":**

The Feasibility Phase demonstrates, with higher confidence, that the Project can be constructed and operated in a technically sound and economically viable manner. This requires further development and definition of the selected Option. This is done through a comprehensive basic level of Engineering that is required to produce a Project Definition Package, whereby a high level of confidence is attained regarding Project Implementation in terms of Safety, Quality, Cost and Schedule. The Scope also includes full development of the Project Execution Plan (PEP) and critical Project Procedures form all aspects governing the Project Implementation.

#### 4.1.4 **"Detail Design / Bankable Feasibility":**

The Bankable Feasibility Phase provides a basis for the Detailed Designs, Construction and Execution. Hence it has the following attributes:

- Detailed Engineering
- Scope Freeze
- Finalised Project Management Plans

The Bankable Feasibility Study is prepared with sufficient detail and use to update and finalise the Business Case for submission to Investors / Lenders when seeking funding for Project Execution.

#### 4.1.5 **"Execution":**

The Execution Phase is the Investment in Constructing, Purchasing or Maintaining (Capital Maintenance) the Asset and the Project is executed in order to deliver the defined Outcomes in line with Time, Cost, Quality and other Parameters.

#### 4.1.6 **"Close-out":**

The Close-out Phase consists of those Processes performed to conclude all Activities across all Project Management Processes to formally complete the Project, Phase or Contractual obligations. When completed, the defined Processes are verified to be complete. The Asset is then transferred and handed over to the Client, together with the associated Project Documentation.

4.2 The PLP Methodology is augmented by 31 (thirty one) Knowledge Areas known as Domains. These Domains are listed in Table 2 below. 12 (twelve) of the Domains are viewed as "Critical" and should be included in all Projects, whilst the remainder can be chosen to be included, as and when applicable.

4.3 Each Domain (refer to Annexures L1 – L31), as set out further in the Document, provides for a list of Deliverables and the requisite level of detail per Project Phase. Furthermore, the Domains may be governed by their own set of Frameworks, Methodologies, Procedures and Templates, as applicable.

31 PLP Domain			
1	Executive Planning (Enhanced)	18	Cost Estimating
2	Health & Safety Management	19	Procurement Management
3	Environmental & Social Governance	20	Construction Management
4	Sustainable Development Design	21	Modularisation - Pre-assembly
5	Process	22	Commissioning & Handover
6	Layouts	23	Value Improving Processes
7	Civils	24	Quality
8	Port & Marine	25	Operational Readiness
9	Rail	26	Owner Requirement Specifications
10	Structures	27	Business & Operational Case
11	Mechanical	28	Property
12	Piping	29	Facilities
13	Electrical	30	Energy Management
14	Systems & Process Controls	31	Security - Gate Review Deliverables
15	Project Execution Systems		
16	Risk Management		
17	Schedule		
12 Critical PLP Domain			
1	Environmental & Social Governance	7	Risk Management
2	Health & Safety Management	8	Business & Operational Case
3	Quality Management	9	Operational Readiness
4	Procurement Management	10	Schedule Management
5	Owner Requirement Specification	11	Cost Estimating
6	Engineering	12	Commissioning & Handover

Table 2: 31 PLP Domains

- 4.4 A Project Controls Framework, known as an Integrated Capital Projects Assurance Framework (ICPAF), attached hereto as Annexure N, consists of Project Controls for each of the identified 31 Domains. There are over 1,600 Project Controls where 204 have been identified as Critical Capital Project Controls (CCPCs). The Top 40 Controls were further identified from the 204 CCPCs.
- 4.5 At the end of each Phase, a Gate Review is conducted to provide assurance that the requirements of the respective Phase have been achieved.
- 4.6 The typical High-level Project Steps for each Phase are as follows:



#### 4.6.1 Phase Financial Approval:

This may be in form of a Memorandum or Business Case to acquire Financial Approval for the next and subsequent Phases.

#### 4.6.2 Pre-Phase Gate Review Set-up:

This Phase is to identify the applicable and relevant Domains, as per Table 2 above, as well as the specific Phase Deliverables for submission to the Gate Review Team. The applicable ICPAF Project Controls (CCPCs) are also identified and included in a Project Control Plan (PCP).

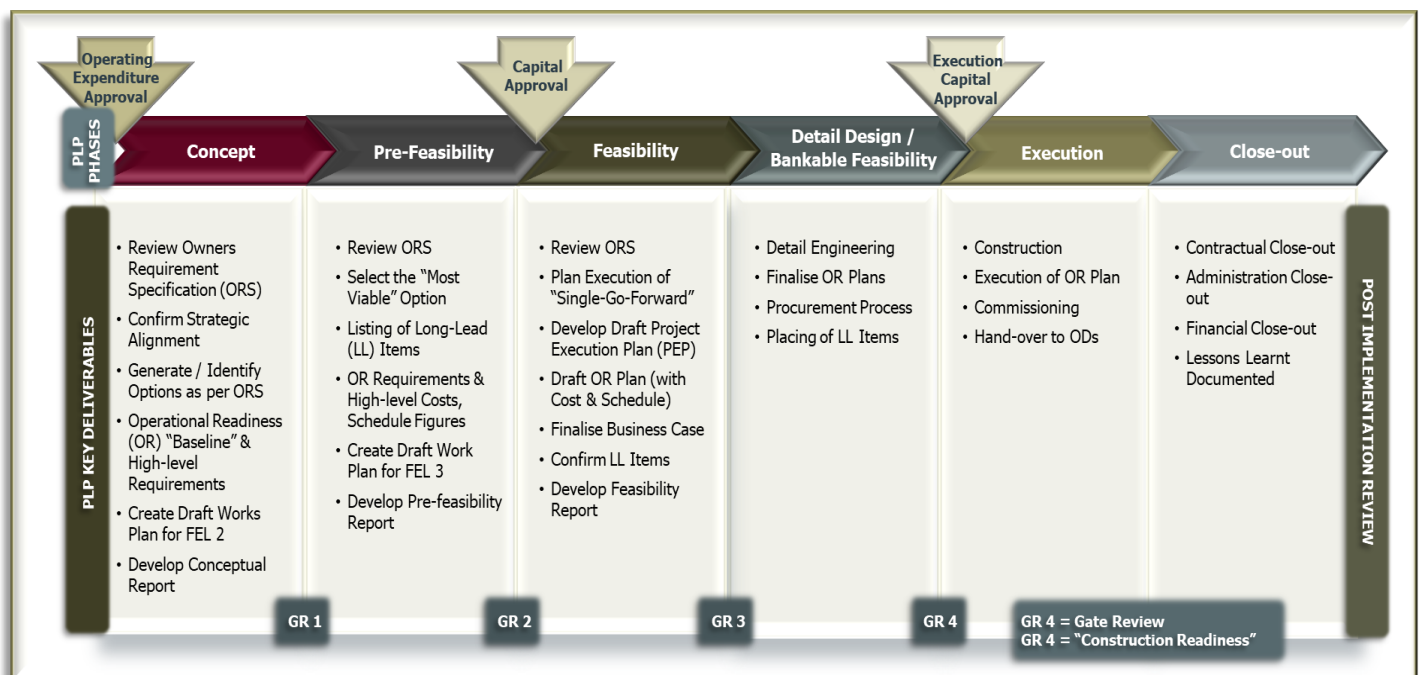
#### 4.6.3 Phase Output Deliverables:

The Project Team produces the required Deliverables.

#### 4.6.4 End-of-Phase Gate Review:

In this Phase, the Gate Review Team reviews and provides assurance that the requirements of the Phase have been adequately met and completed.

4.7 Figure 1 below provides the Methodology and High-level Activities of each of the PLP Phases:



**Figure 1: Transnet Project Lifecycle Process**

4.8 The Practices for the PLP can be found in the following Documentation / Annexures:

Annexure		PLP Methodology Documentation Description
1	<b>Annexure A:</b>	PLP Overview Manual
2	<b>Annexure B:</b>	FEL 1 – Conceptual Study Phase Manual
3	<b>Annexure C:</b>	FEL 2 – Pre-Feasibility Study Phase Manual
4	<b>Annexure D:</b>	FEL 3 – Feasibility Study Phase Manual
5	<b>Annexure E:</b>	FEL 4 – Execution Phase Manual
6	<b>Annexure F:</b>	Close-out Phase Manual
7	<b>Annexure G:</b>	PLP Gate Review Manual
8	<b>Annexure H:</b>	PLP Methodology and Gate Review Standard Operating Procedure
9	<b>Annexure I:</b>	PLP Classification Tool
10	<b>Annexure J:</b>	PLP Digital Training Tool
11	<b>Annexure K:</b>	Gate Review Terms of Reference
12	<b>Annexures L1 – L31:</b>	31 PLP Domain Tools (Knowledge Areas)
13	<b>Annexure M:</b>	PLP Practice Note
14	<b>Annexure N:</b>	Integrated Capital Projects Assurance Framework (ICPAF)
15	<b>Annexure O:</b>	Project Controls Plan Standard Operating Procedure
16	<b>Annexure P:</b>	PLP Front-End Research Manual
17	<b>Annexure Q:</b>	Public Finance Management Act, No. 1 of 1999
18	<b>Annexure R:</b>	Framework for Infrastructure Development & Management (FIDPM)

**Table 3: PLP Methodology Annexures**

## 5 REGULATORY COMPLIANCE

5.1 Transnet SOC Ltd is a State Owned Enterprise and is required to comply with the following Legislation and Frameworks:

### 5.1.1 Public Finance Management Act, No. 1 of 1999 (PFMA):

5.1.1.1 The PFMA, as amended by Act No. 29 of 1999, came into force as at 1 April 2000. Transnet is classified as a major Public Entity as per Schedule 2 of the PFMA. The PFMA is one of the most important Legislations passed by the first Democratic Government in South Africa.

5.1.1.2 The Core Objective of the PFMA is to secure accountability and sound management and aim to promote balance between control of Public Entities and the Performance thereof.

5.1.1.3 ***The key Objectives of PFMA:***

- Secure, sound system of Financial Management in the Public Sector;
- ensure Revenue, Expenditure, Assets and Liabilities are managed efficiently and effectively;
- provide for responsibilities of Persons entrusted with Financial Management;
- promote Public Sector Managers to manage, be transparent and be held more accountable;
- ensure Resources are managed efficiently and effectively;
- ensure timeous provision of Quality Information; and
- eliminate waste and corruption in the use of Assets

5.1.1.3.1 ***Fruitless and Wasteful Expenditure:***

- An Expense or Loss must have been incurred (loss of Cash, Assets, other Company resources)
- The Expense or Loss would have been avoided if reasonable steps were taken
- A Company Official must have played a role in the Expense or Loss incurred
- No Benefit / Value was obtained by the Company

5.1.1.3.2 ***Irregular Expenditure:***

- The Company must have incurred an Expense
- A Company Official must have been party to the Transaction
- The Expense, as incurred in contravention of Legislation, Compliance Laws, Rules or Standards (includes approving Transactions outside of ones' Delegation of Authority)

5.1.2 **Framework for Infrastructure Development and Procurement Management (FIDPM):**

5.1.2.1 The FIDPM was issued by National Treasury in 2019 for compliance by State Owned Enterprises. It provides the minimum Framework and Processes to Portfolio, Programme and Project Delivery.

5.1.2.2 ***The Key Statements within the FIDPM:***

The Infrastructure Delivery Management Processes comprise of Portfolio, Programmes, Operations, Maintenance and Projects, as set out in Figure 2 Below:

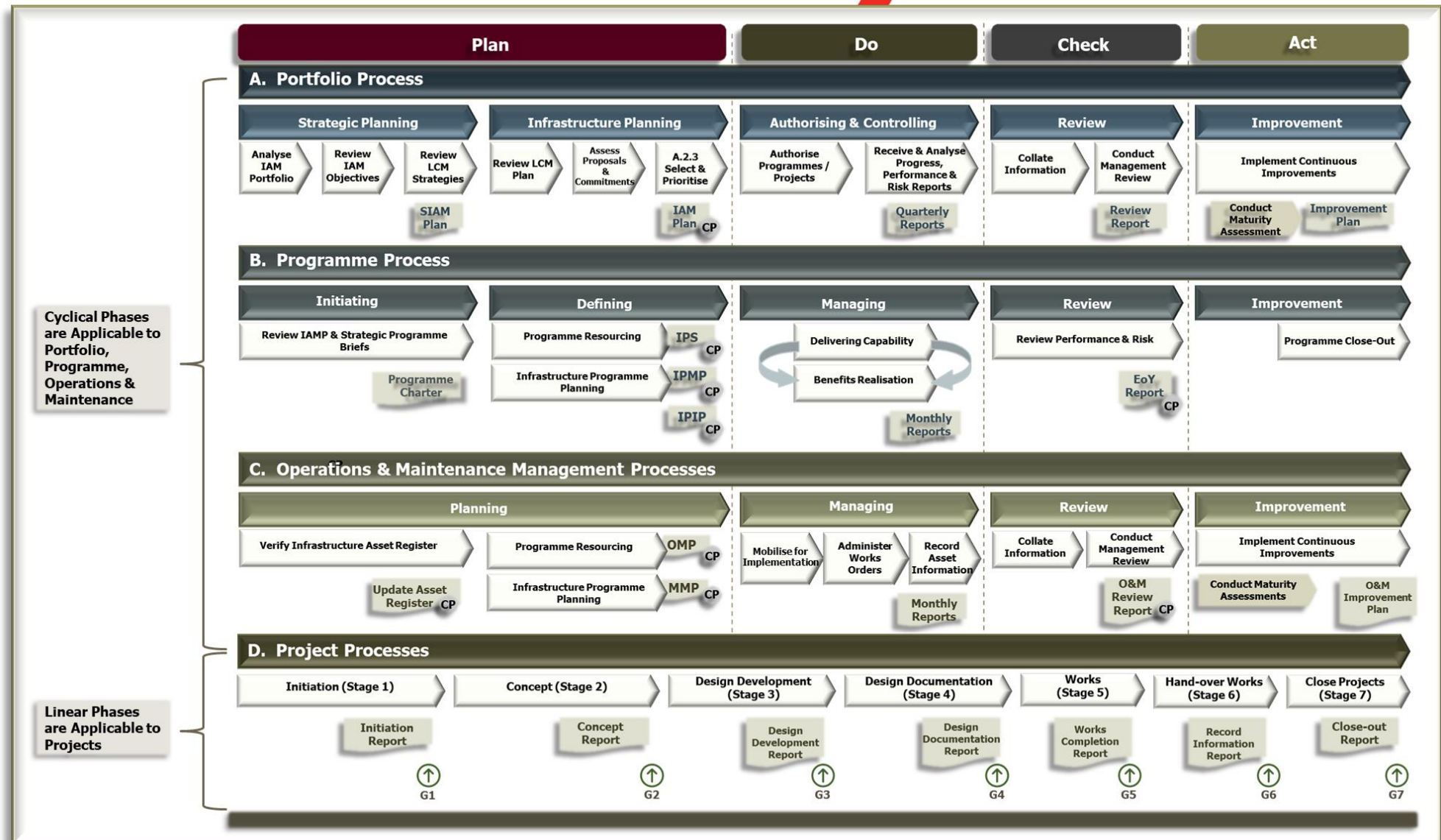


Figure 2: Infrastructure Delivery Processes (IDM), Includes Linear Stages Applicable to Projects

- 5.1.2.3 Portfolio, Programme, Operations & Maintenance Processes are typically cyclical and performed in Phases that are reviewed and updated on an annual basis.
- 5.1.2.4 The Portfolio, Programme, Operations & Maintenance Phases contain Key Control Points (CP) at which the associated Phase Deliverables need to be approved. The Phase may continue beyond the CP once the Phase Deliverables have been approved by the person or body designated in the Institutional Policy arrangement.
- 5.1.2.5 The Project Processes are typically linear, meaning a Project Process is performed in Stages from Start to Completion.
- 5.1.2.6 The Project Stages contain Gates at the end of each Stage, at which the associated Stage Deliverable is to be approved. The Project may only continue beyond the Stage Gate, in accordance with the approved Contracting arrangements, once the Stage Deliverable has been approved by the person or body designated in the Institutional Policy arrangement.
- 5.1.2.7 The Portfolio Phases that outline and describe the annual, cyclical, repetitive Processes in the management of a Portfolio of Infrastructure Assets are:
  - Strategic Planning
  - Infrastructure Planning
  - Authorising & Controlling
  - Review
  - Improvement
- 5.1.2.8 The Programme Phases that outline and describe the annual, cyclical and repetitive Processes in the management of a Programme of Infrastructure Assets are:
  - Initiating
  - Defining
  - Managing
- 5.1.2.9 The Operations & Maintenance (O&M) Phases that outline and describe the annual, cyclical and repetitive Processes of a Facility or an Infrastructure Asset Network are:
  - Planning
  - Implementation
  - Review
  - Improvement
- 5.1.2.10 The Project Stages of Project, from Start to End, are as follows:
  - Initiation

- Concept
- Design Development
- Design Documentation
- Works
- Handover
- Close-out

### 5.1.3 Project Gate Reviews (Gate Reviews):

5.1.3.1 The Framework prescribes the Gateway Review at the end of Stage 2 (refer to Figure 2 above) as the minimum requirement. The focus of such a Review is the quality of the documentation as well as the following:

#### 5.1.3.1.1 ***Deliverability:***

The extent to which a Project is deemed likely to deliver the expected Benefits within the declared Cost, Time and Performance Envelope.

#### 5.1.3.1.2 ***Affordability:***

The extent to which the level of Expenditure and Financial Risk involved in the Project can be taken up, given the Organisation's overall Financial position, both singularly and in the light of its other current and projected Commitments.

#### 5.1.3.1.3 ***Value for Money:***

The optimum combination of whole life Costs and Quality (or "Fitness-for-Purpose") to meet the User's requirements.

## 6 AGILE PROJECT MANAGEMENT

6.1 The term "Agile" was coined to unite a set of existing methods and techniques that were being used primarily in the Software Development Industry as alternatives to traditional Project Management methods. Three (3) of the most well-known methods are "Lean", "Kanban" and "Scrum".

### 6.2.1 "Lean":

6.2.1.1 Lean are Value-adding Activities and Processes that are maintained and improved by removing unnecessary intermediate Steps, Activities and People. In this way the Lean Principles revolve around better Quality, increased speed and improved Customer Satisfaction. Lean has applied 7 (seven) Principles that form the foundation of this Agile Project Management Method:

- 1) Eliminate Waste
- 2) Amplify Learning and Create Knowledge
- 3) Decide as Late as Possible
- 4) Deliver as fast as Possible
- 5) Empower the Team
- 6) Build on Integrity
- 7) See the Whole (Defects, Excess Processing, Over-production, Waiting, inventory, Moving, Transportation, Non-utilised Talent)

#### 6.2.2 **"Kanban":**

6.2.2.1 Kanban includes 6 (six) Core Practices, as follows:

- 1) Visualise
- 2) Limit Work-in-Progress
- 3) Manage Flow
- 4) Make Process Explicit
- 5) Implement Feedback Loops
- 6) Improve Collaboratively / Evolve Experimentally

#### 6.2.3 **"Scrum":**

6.2.3.1 Scrum guides Project Teams through an iterative and incremental Project Delivery Process, which includes 3 (three) Concepts:

- 1) Roles of Product Master, Scrum Master and Scrum Team
- 2) Artefacts including Backlog, Print Backlog and Increment
- 3) Time-boxing

6.2 It is important to select an Agile Project Management Method that is effective, efficient and best suited to Transnet. In some instances, an Organisation may require more functions than a single Method can offer. Combining Agile Project Management Methods can be useful in some cases to ensure that the Method used is as effective and efficient as possible. As Lean, Kanban and Scrum as well as other Agile Methodologies share some similar Principles based on Agile, it is possible to combine aspects of 2 or more of these Methods to create a unique Method suited to the Organisation, known as "Hybrid Agile Method".

## 7 REQUIREMENT

7.1 Transnet seeks the Service of a qualified Agile Project Management Methodology Service Provider(s) to:



- 7.1.1 Review the Transnet Project Management Methodology (PLP), recommend and revise the PLP Practices and Artefacts to comply with Agile Principles.
- 7.1.2 Package the Methodology on a Digital Platform via an appropriate Software Tool Set.
- 7.1.3 Produce Digital Training for the SAP LSO Platform using Articulate 360.
- 7.1.4 Establish a Transition Plan to migrate the existing Projects to the new Methodology.
- 7.1.5 Support Pilot Migrations on 6 (six) existing Projects (1 per Operating Division).
- 7.1.6 Establish and implement Change Management Support to the Transition.
- 7.1.7 Train, coach and mentor new and existing Project Teams to guide and assist with the Transition.
- 7.2 The aim of this exercise is to improve the Project Performance through the application Agile Principles and Practices.

## 8 SCOPE OF REQUIREMENTS

- 8.1 Transnet would like to appoint an Agile Project Management Methodology Service Provider(s) for a period of 12 months (twelve), that is qualified, accredited and specialises in Agile Project Management, within the stipulated period.
- 8.2 The Agile Project Management Methodology Service Provider(s) will focus on the following areas:
  - 8.2.1 Analyse the Transnet Project Management Methodology (PLP) Documentation:

PLP Methodology Documentation Description		Corresponding Annexure
1	PLP Overview Manual	<b>Annexure A</b>
2	FEL 1 – Conceptual Study Phase Manual	<b>Annexure B</b>
3	FEL 2 – Pre-Feasibility Study Phase Manual	<b>Annexure C</b>
4	FEL 3 – Feasibility Study Phase Manual	<b>Annexure D</b>
5	FEL 4 – Execution Phase Manual	<b>Annexure E</b>
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8	PLP Methodology and Gate Review Standard Operating Procedure	<b>Annexure H</b>
9	PLP Classification Tool	<b>Annexure I</b>
10	PLP Digital Training Tool	<b>Annexure J</b>

PLP Methodology Documentation Description		Corresponding Annexure
11	Gate Review Terms of Reference	<b>Annexure K</b>
12	31 PLP Domain Tools (Knowledge Areas)	<b>Annexures L1 – L31</b>
13	PLP Practice Note	<b>Annexure M</b>
14	Integrated Capital Projects Assurance Framework (ICPAF)	<b>Annexure N</b>
15	Project Controls Plan Standard Operating Procedure	<b>Annexure O</b>
16	PLP Front-End Research Manual	<b>Annexure P</b>

**Table 4: Current Transnet Project Management Methodology (PLP) Documentation**

- 8.2.2 Recommend a “Fit-for-Purpose” Transnet Agile Project Management Methodology considering the PFMA, FIDPM, Lean, Kanban, Scrum and other Agile Frameworks.
- 8.2.3 Update / re-write the Transnet Project Management Methodology (PLP) Manuals, Procedures, Templates, etc. (Refer to Annexures A – N and note that not all Annexures may be updated).
- 8.2.4 Package the revised Project Management Methodology onto Digital Platform.
- 8.2.5 Update PLP Digital Training Course and Assessments at NQF Level 3, using the Articulate 360 for SAP LSO Platform.
- 8.2.7 Perform Change Management Analysis and compile a Change Management Plan and Transition Plan. Execute the Change Management Plan and Transition Plan.
- 8.2.8 Pilot Transition on 6 (six) active Projects (1 per Operating Division). Perform Time Series Monitoring of Processes for optimisation.
- 8.2.9 Training Project Teams on revised Project Management Methodology.
- 8.2.10 Coach and mentor Pilot Project(s), as per both the Change Management and Transition Plans.
- 8.2.11 Provide ongoing Mentoring and Coaching for Project’s transitioning to the revised PLP Methodology.

## 9 LIST OF OUTPUTS

### 9.1 Key Deliverables

- 9.1.1 The Agile Project Management Methodology Service Provider(s) shall produce the following Agile PLP Outputs:

Agile PLP Documentation Description Outputs	
1	Agile PLP Overview Manual
2	Agile Concept Manual
3	Agile Pre-feasibility Manual
4	Agile Feasibility Manual
5	Agile Detail Design / Bankable Feasibility Manual
6	Agile PLP Methodology and Gate Review Standard Operating Procedure
7	Agile PLP Classification Tool
8	Agile PLP Digital Training Tool
9	Agile Gate Review Manual
10	Agile Gate Review Terms of Reference
11	Agile 31 PLP Domain Tools (Knowledge Areas)
12	Agile Integrated Capital Projects Assurance Framework (ICPAF)
13	Agile ICPAF Standard Operating Procedure
14	Revised Classroom-based Training Pack (PowerPoint)
15	Update Digital Training Course and Assessment at NQF Level 3 using Articulate 360 for SAP LSO Platform

**Table 5: Agile PLP Documentation Outputs**

- 9.1.2 The following Agile Project Management Outputs are to be delivered for the Agile PLP Project:

Agile Project Management Documentation Description Outputs	
1	Product Vision & Roadmap (Project Plan)
2	Product Backlog (Project Schedule)
3	Weekly Sprints
4	Project Cost Report
5	Stakeholder Plan

Agile Project Management Documentation Description Outputs	
6	Risk Plan & Risk Register
7	Transition Plan
8	Training Plan
9	Handover Document

**Table 6: Agile Project Management Documentation Outputs**

## 9.2 Coaching, Mentoring and Training

- 9.2.1 The preferred Service Provider(s) must be willing to transfer “Train-the-Trainer” Skills to the Capital Governance Centre of Excellence (CoE) to augment the e-Learning with Classroom-based Training, if needed. The preferred Service Provider(s) must provide a proposed Plan of the Skill Transfer to the Capital Governance Centre of Excellence and Subject Matter Experts (SMEs).

## 9.3 Project Management and Progress Reporting

- 9.3.1 The preferred Service Provider(s) will provide the overall Project Management (Agile Project Management Approach) Functions for the duration of the Contract and Work performed.
- 9.3.2 The preferred Service Provider(s) will be expected to provide a Plan for Deliverables and provide regular feedback. The frequency of the Feedback Sessions will be agreed between the Service Provider and the Transnet Project Sponsor.
- 9.3.3 The Reporting may be conducted weekly, both written and verbal.

## 9.4 Handover Requirements

- 9.4.1 The Master Copy of the Material (refer to the Key Deliverables Table) will be delivered on a monthly basis as completed, via a local or shared network drive.
- 9.4.2 An editable version of the Key Deliverables must be provided for, including a print-layout version for Publishers / Printers, i.e. same as Master Copy but in a form that can be edited, e.g. MS Publisher / MS Word in order to amend.
- 9.4.3 Pictures and other forms of Media must be included in the native editable format. Training Media Pictures, Animations and Diagrams, etc., must be provided.
- 9.4.4 Applicable Frameworks, Policies, Procedures, etc., used and provided for against the developed Key Deliverables.
- 9.4.5 All required Acts and Legislative Requirements are to be considered and included as part of the Key Deliverables.

- 9.4.6 All other Attachments / Assessments, etc., associated with the Key Deliverables.
- 9.4.7 The preferred Service Provider(s) must be willing to "Pilot" the Agile PLP. The "Pilot" will comprise of a number of key Implementation Stakeholders.

## 9.5 Acceptance Criteria

- 9.5.1 The Transnet Project Sponsor shall exercise sole discretion to accept the above List of Outputs / Key Deliverables in accordance with the Handover Requirements.

## 9.6 Delivery Period

- 9.6.1 All of the above List of Outputs / Key Deliverables will be expected to be developed and delivered within the specified 12-month period.

## 9.7 Copyright and Ownership

- 9.7.1 The Copyright and Ownership of the Final Product will belong to Transnet SOC Ltd as the Employer of the requisite Services. Ownership and responsibility for Content and all Intellectual Property remains with Transnet SOC Ltd.
- 9.7.2 Transnet commits to provide SMEs as support and will assist with sign-off of the various Phases of the Project.

## 9.8 Accreditation and / or Registration

- 9.8.1 All Training Material developed must be aligned to the stipulated NQF Standard. Should Transnet choose to seek Accreditation with SAQA at a later stage, the relevant Curriculum must comply accordingly.

# 10 BID PROPOSAL

## 10.1 The Bid Proposal must specify the following:

- 10.1.1 Previous experience to the required Services of at least 5 (five) years' experience (Client Base and References, Testimonials and Case Studies as proof of the Requirement)
- 10.1.2 Proposed Method Statement to the required Services as outlined above. It should be noted that all Employees have access to the Internet, should the Assessments require Online completion.
- 10.1.3 Proposed Timelines to all required Deliverables, i.e. Design, Delivery of Packages / Learning Solutions, Individual Assessments and Individual Feedback.

# 11 LIST OF ANNEXURES

- 11.1 All the Annexures listed hereunder shall be deemed to form part of the Scope of Works and are available only in the Soft Copy format (CD):

Annexure		PLP Methodology Documentation Description
1	<b>Annexure A:</b>	PLP Overview Manual
2	<b>Annexure B:</b>	FEL 1 – Conceptual Study Phase Manual
3	<b>Annexure C:</b>	FEL 2 – Pre-Feasibility Study Phase Manual
4	<b>Annexure D:</b>	FEL 3 – Feasibility Study Phase Manual
5	<b>Annexure E:</b>	FEL 4 – Execution Phase Manual
6	<b>Annexure F:</b>	Close-out Phase Manual
7	<b>Annexure G:</b>	PLP Gate Review Manual
8	<b>Annexure H:</b>	PLP Methodology and Gate Review Standard Operating Procedure
9	<b>Annexure I:</b>	PLP Classification Tool
10	<b>Annexure J:</b>	PLP Digital Training Tool
11	<b>Annexure K:</b>	Gate Review Terms of Reference
12	<b>Annexures L1 – L31:</b>	<b>31 PLP Domain Tools (Knowledge Areas):</b>
13	<b>Annexure L1:</b>	Executive Planning (Enhanced)
14	<b>Annexure L2:</b>	Health & Safety
15	<b>Annexure L3:</b>	Environmental & Social Governance
16	<b>Annexure L4:</b>	Sustainable Development Design
17	<b>Annexure L5:</b>	Process
18	<b>Annexure L6:</b>	Layouts
19	<b>Annexure L7:</b>	Civils
20	<b>Annexure L8:</b>	Port & Marine
21	<b>Annexure L9:</b>	Rail
22	<b>Annexure L10:</b>	Structures
23	<b>Annexure L11:</b>	Mechanical
24	<b>Annexure L12:</b>	Piping
25	<b>Annexure L13:</b>	Electrical
26	<b>Annexure L14:</b>	Systems & Process Controls
27	<b>Annexure L15:</b>	Project Execution Systems
28	<b>Annexure L16:</b>	Risk Management
29	<b>Annexure L17:</b>	Schedule
30	<b>Annexure L18:</b>	Cost Estimating

Annexure		PLP Methodology Documentation Description
31	<b>Annexure L19:</b>	Procurement - iSCM
32	<b>Annexure L20:</b>	Construction Management
33	<b>Annexure L21:</b>	Modularisation - Pre-assembly
34	<b>Annexure L22:</b>	Commissioning
35	<b>Annexure L23:</b>	Value Improving Processes
36	<b>Annexure L24:</b>	Quality
37	<b>Annexure L25:</b>	Operational Readiness
38	<b>Annexure L26:</b>	Owner Requirement Specifications
39	<b>Annexure L27:</b>	Business & Operational Case
40	<b>Annexure L28:</b>	Property
41	<b>Annexure L29:</b>	Facilities
42	<b>Annexure L30:</b>	Energy Management
43	<b>Annexure L31:</b>	Security - Gate Review Deliverables
44	<b>Annexure M:</b>	PLP Practice Note
45	<b>Annexure N:</b>	Integrated Capital Projects Assurance Framework (ICPAF)
46	<b>Annexure O:</b>	Project Controls Plan Standard Operating Procedure
47	<b>Annexure P:</b>	PLP Front-End Research Manual
48	<b>Annexure Q:</b>	Public Finance Management Act, No. 1 of 1999
49	<b>Annexure R:</b>	Framework for Infrastructure Development & Management (FIDPM)

**Table 7: List of PLP Methodology Documentation Annexures**