

invest SA

ONE STOP SHOP

TERMS OF REFERENCE FOR EFFECTIVE GOVERNANCE OF INVESTSA ONE STOP SHOPS

Document Version: **1.0**



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APPROVALS

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September 10, 2018	3.0	Amb. Sadick Jaffer Chief Director: Investment Promotion & Facilitation	
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Acronyms

#	Acronym	Definition
1	BBBEE	Broad-based Black Economic Empowerment
2	CIPC	Companies and Intellectual Property Commission
3	dti	Department of Trade & Industry
4	FDI	Foreign Direct Investment
5	GDP	Gross Domestic Product
6	GFCF	Gross Fixed Capital Formation
7	ICT	Information & Communication Technology
8	IMC	Inter-ministerial Committee On Investment
9	InvestSA	Investment South Africa
10	IPAP	Industrial Policy Action Plan
11	IDZs	Industrial Development Zones
12	M&E	Monitoring & Evaluation
13	MoA	Memorandum of Agreement
14	MoU	Memorandum of Understanding
15	OSS	One Stop Shop
16	PFMA	Public Finance Management Act
17	PIPAs	Provincial Investment Promotion Agencies
18	SCM	Supply Chain Management
19	SEZ	Special Economic Zones
20	SEZ & ET	Special Economic Zones & Economic Transformation
21	SME	Small & Medium Enterprises

Executive Summary

The concept of a One Stop Shop in the FDI space became an important phenomenon as a vehicle to deal with the administrative burden often experienced by investors.

This imperative, if implemented collaboratively across various government entities, will provide a more streamlined and investor-friendly policy environment. This implies that the investor will have to be in contact with one entity to obtain all the necessary paperwork in one streamlined and coordinated process, rather than having to go through a maze of different government entities.

However, the implementation of One Stop Shops comes with its own challenges and burdens. International best practices indicate the importance of combining the One Stop Shop concept with policy reforms.

This draft document outlines the steps towards the successful implementation of the One Stop concept and will undoubtedly assist all parties.

**ACTING DEPUTY DIRECTOR-GENERAL
INVESTSA**

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1. Introduction

Investment attraction is a key priority of government to mitigate the challenges associated with the global slowdown in economic growth and development.

Government's National Development Plan's Vision 2030 articulates the need to increase the gross fixed capital formation (GFCF) to GDP from 17% to 30%.

The Inter-Ministerial Committee (IMC) on Investment Promotion was established in 2016 to further improve the investor climate and support. The IMC will focus on the following tasks:

- Overall coordination, alignment and policy coherence on economic policy and regulatory framework.
- Improvement in South Africa's investment climate in particular the ease of doing business and competitiveness of South Africa.
- Coordination and roll out of the one-stop shop service across all levels in government. The one-stop service will fast-track, unblock and reduce red tape in government.
- Overall coordination and alignment of South Africa's marketing, communication, and media in terms of our messaging of the country as an investment destination both locally and abroad.
- Scaling up private sector investment, improving the impact of the Industrial Policy Action Plan, support for the black industrialist program, SME development and the Township economy.
- Identification, packaging and implementing investment projects in terms of national interest and economic development.
- Providing regional integration and industrialisation to the African continent.
- Promoting cooperation and partnerships between government and the private sector.
- Coordinate inputs into the task teams of the Presidential Big Business Working Group and the new Broad Based Black Economic Empowerment commission. (Source: DTI, 2016)

Furthermore, the President announced the establishment of a One Stop Inter-Departmental Clearing House to address investor complaints and problems during the State of the Nation Address in February 2016.

2. The broad mandate of Investment South Africa

In March 2016 the Department of Trade and Industry established Investment South Africa, a fully-fledged division to focus on investment promotion, facilitation and aftercare. The facilitation and aftercare function will be a dedicated service to coordinate, fast track, unblock and reduce red tape in government serving as the virtual One Stop Shop. Investment South Africa broadly functions as the Inter-Governmental Clearing House, investment facilitation or a "window" mechanism where relevant government agencies are brought to a single cohesive structure that coordinates and streamline processes to provide prompt, efficient and transparent services to investors.

Investment South Africa is further mandated to coordinate the improvement of the Investment Climate and ease of doing business by identifying bottlenecks, administrative barriers and have a plan of action to improve service delivery. Key government services will be identified and automated into a single window clearance over the next 2-3 years.

3. Inter-governmental collaboration for the establishment and operationalisation of the InvestSA One Stop Shops

Investment South Africa was mandated by the IMC and Presidency to champion the establishment of the One Stop Shops. Specifically, then this will be implemented through the establishment of the National One Stop Shop and roll out to all provinces of the next three years.

The One Stop Shops (OSS) will be the focal point of contact in government for all investors to coordinate and facilitate the relevant government departments involved in regulatory, registration, permits and licencing.

The OSS will significantly shorten and simplify administrative procedures and guidelines for the issuance of business approvals, permits and licences and thereby remove bottlenecks faced by investors in establishing and running business. It will further reduce the silo functioning in the investment arena.

Investment South Africa and strategic provincial partners then seeks to provide an integrated service to investors and will:

- Facilitate the entire investment value chain;
- Provide specialist advisory services to investors;
- Coordinate effectively across various line departments;
- Communicate all services to current and potential investors;
- Act as the facilitation window of clearance of registration, licencing and permits;
- Facilitate the provision of information and support on available investor incentives schemes; and
- Coordinate the regulatory reform / roadmap process in South Africa.

4. National Departments / Agencies supporting the establishment and operational functioning

The One Stop Shop will be operationalized in collaboration with key government departments and agencies. These include amongst other, the:

#	Department / Agency	#	Department / Agency
1	Agriculture, Forestry & Fisheries	9	Health
2	Cooperative Governance	10	Labour
3	Companies & Intellectual Property Commission	11	Mineral Resources
4	Energy	12	Public Enterprises
5	Environmental Affairs	13	Rural Development & land Reform
6	*Economic Development	14	Science & Technology
7	*Finance	15	*Small Business Development
8	Home Affairs	16	*Trade & Industry

*including applicable agencies

The Provincial One Stop Shops will include some of the above critical services and collaborate with other applicable local entities in their service delivery.

5. Operational model of the InvestSA One Stop Shops

The following schematic diagram illustrates the operational functioning:



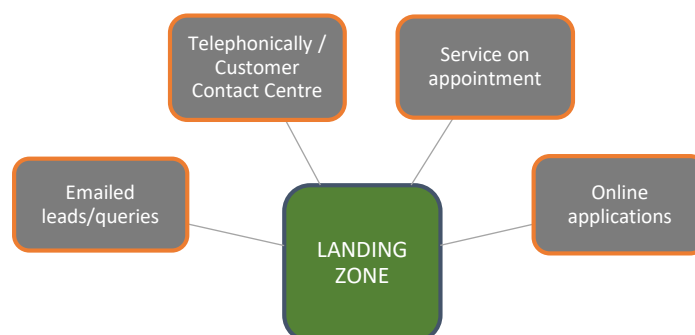
The **service offerings** at the One Stop Shops will include:

- Information sharing – Investors / Chambers of Commerce / Foreign Missions
- Permits and regulatory compliance;
- Legal and financial compliance;
- Incentive support and funding partnerships
- Facilitation and aftercare

The Provincial Lead Entity will enter into MoUs with all service rendering parties at that level. Investment South Africa, Department of Trade and Industry will enter into similar agreements with National Departments that will extend their services to the Provinces.

6. The customer interface

The service delivery at all One Stop Shops will be triggered by customers in the following manner:



7. Obligations of Parties

7.1 The National One Stop Shop

The obligations of parties include those that will be operational at national as well as provincial level. Reference in this paragraph is focused on the National One Stop Shop.

All parties will enter into a Memorandum of Understanding for a 3-year period that will guide the service delivery at the National and Provincial One Stop Shops. The general obligations of all parties (National & Provincial OSS) will be included in the MoA and will focus on the following:

- Annual planning exercise, agreed activities and integrated processes;
- Parties will conduct monthly operational meetings for (reporting, evaluation and planning purpose);
- Parties agree to establish an operational management committee / structure;
- Parties to be responsible for their own staff contracts; payment of salaries; taxes; subsistence and travel and other legal requirements;
- Parties shall respect all applicable laws and regulations and ethical standards of South Africa and international jurisdiction of an initiative;
- Information received in execution of this all operations may not be divulged or used for personal financial gain or financial gain of a third party
- Parties shall make available to each other whatever information relating to the execution of all operations on a reasonable request;
- Parties declare that they have taken note of this general obligations and acknowledge that the fulfilment is an essential requirement of the successful implementation of the One Stop service;
- Parties shall at all times observe to the provisions of the PFMA and its regulations in procuring services;
- Parties shall at all times observe to the provisions of the Public Service Code of Conduct and general operational guidelines of the One Stop Shop;
- Representatives of the parties are to meet every three months to review progress and agree on future areas of cooperation and assistance.

7.1.1 Obligations of the Department of Trade & Industry

Operational activities	Obligations
<i>Project management</i>	<ul style="list-style-type: none"> ▪ Overall project planning for the roll-out of the National One Stop Shop ▪ Implementation, monitoring of the National One Stop Shop roll-out ▪ Financial planning for the National & Provincial One Stop Shops ▪ Development of a Marketing & Communication Strategy for the National & Provincial One Stop Shops ▪ Develop a Terms of Reference for the National & provincial OSS roll-out ▪ Reporting
<i>Stakeholder management</i>	<ul style="list-style-type: none"> ▪ Identify all strategic partners ▪ Provide information and awareness ▪ Conduct regular meetings ▪ Identify blockages and facilitate the effective management of the National & Provincial OSS ▪ Establish a National OSS Management Committee ▪ Provides full secretariat services
<i>Parking</i>	<ul style="list-style-type: none"> ▪ Provide designated parking for strategic partners seconded to the National One Stop Shop and international dignitaries (i.e. investors)
<i>Utilities</i>	<ul style="list-style-type: none"> ▪ Provide access to utilities ▪ Monitor the utilisation of the facilities
<i>Technology</i>	<ul style="list-style-type: none"> ▪ Provide reasonable access to technology services ▪ Provide access to a Customer Relations Management Systems for reporting and analytics

7.1.2 Obligations of the National Government Departments / Agencies

Operational activities	Obligations
Project management	<ul style="list-style-type: none"> ▪ Provide input into the annual project planning and quarterly reviews ▪ Provide input into the annual financial planning for the National OSS ▪ Provide input into the annual Marketing & Communication Strategy for the National One Stop Shops ▪ Provide input into the monthly, quarterly, and annual reporting
Stakeholder management	<ul style="list-style-type: none"> ▪ Provide their own office branding and materials ▪ Utilise the allocated office space and furniture for the intended use only ▪ Adhere to the specified operational / office hours of the National OSS
Facilities (National One Stop Shop)	<ul style="list-style-type: none"> ▪ Provide the name and vehicle registration details of the secondee and alternative to the OSS Office Manager ▪ Utilise the parking facilities responsibly
Parking	<ul style="list-style-type: none"> ▪ Utilise all utilities in a responsible manner ▪ Provide their own catering for the office and investor engagements
Utilities	<ul style="list-style-type: none"> ▪ Utilise all utilities in a responsible manner ▪ Provide their own catering for the office and investor engagements
Technology	<ul style="list-style-type: none"> ▪ Provide their own computer and other equipment ▪ Be responsible for the safekeeping of their own computer equipment ▪ Record and provide their weekly, monthly, quarterly and annual activities / statistics on the a Customer Relations Management Systems for reporting and analytics

7.2 Obligations of parties at the Provincial One Stop Shop

The general obligations contained in paragraph 8 are also applicable at provincial level.

7.2.1 Obligations of the Department of Trade & Industry

The success of the National One Stop Shop relies on the provision of effective services at the Provincial level. Investment South Africa, **the dti** will be therefor be required to render a supportive roll to the implementation and operations.

Operational activities	Obligations
Project management	<ul style="list-style-type: none"> ▪ Provide input to overall project planning for the roll-out of the Provincial One Stop Shop ▪ Implementation, monitoring of the Provincial One Stop Shop roll-out ▪ Financial planning for the Provincial One Stop Shops in accordance with the funding model ▪ Provide input to the development of a Marketing & Communication Strategy for the Provincial One Stop Shops ▪ Provide input to the development of the Concept Document for the Provincial OSS roll-out and participate in all provincial project management activities
Stakeholder management	<ul style="list-style-type: none"> ▪ Participate in provincial stakeholder activities ▪ Provide information and awareness ▪ Collaborate to identify blockages and facilitate the effective management of the Provincial OSS ▪ Establish a National OSS Management Committee (consisting of provincial representatives)
Facilities (Provincial One Stop Shop)	<ul style="list-style-type: none"> ▪ Develop norms and standards for the space planning, furniture and audio visual equipment for the P OSS ▪ Participate in identifying and procurement of professional services for the construction of the Provincial One Stop Shop ▪ Coordinate and consolidate the P OSS reporting
Technology	<ul style="list-style-type: none"> ▪ Provide reasonable access to integrated technology services ▪ Provide access to a Customer Relations Management Systems for reporting and analytics

7.2.2 Obligations of the Provincial Investment Promotion Agencies

<i>Operational activities</i>	Obligations
Project management	<ul style="list-style-type: none"> ▪ Overall project planning for the roll-out of the Provincial One Stop Shop ▪ Implementation, monitoring of the Provincial One Stop Shop roll-out ▪ Financial planning for the Provincial One Stop Shops in collaboration with Investment South Africa ▪ Development of a Marketing & Communication Strategy for the Provincial One Stop Shop ▪ Develop a Concept Document for the Provincial OSS roll-out ▪ Reporting
Stakeholder management	<ul style="list-style-type: none"> ▪ Identify all strategic partners ▪ Provide information and awareness ▪ Conduct regular meetings ▪ Identify blockages and facilitate the effective management of the Provincial OSS ▪ Provides full secretariat services ▪ Collaborate with the dti resource allocated at the Provincial OSS on the overall operational management ▪ Form part and participate in the established National OSS Management Committee
Facilities (Provincial One Stop Shop)	<ul style="list-style-type: none"> ▪ Identify and procure professional services for the construction of the Provincial One Stop Shop ▪ Allocate office space and basic office furniture for identified strategic partners ▪ Manage the Provincial One Stop Shop
Parking	<ul style="list-style-type: none"> ▪ Provide designated parking for strategic partners seconded to the Provincial One Stop Shop and international dignitaries
Utilities	<ul style="list-style-type: none"> ▪ Provide access to utilities ▪ Monitor the utilisation of the facilities
Technology	<ul style="list-style-type: none"> ▪ Provide their own computer and other equipment ▪ Be responsible for the safekeeping of their own computer equipment ▪ Record and provide their weekly, monthly, quarterly and annual activities / statistics on the a Customer Relations Management Systems for reporting and analytics

8. The governance structure

A collaborative project implementation approach will be followed at national and provincial level. The establishment and operationalization of the **InvestSA** One Stop Shops will be anchored on the inclusive and effective management of identified milestones and activities.

The establishment of the **InvestSA** One Stop Shops will be characterized by:

- a. Conceptualisation and planning phase – feasibility; site identification / acquisition and refurbishment; development of stakeholder engagement plan; identification and constitution of steering committee and work streams; development of marketing and communications plan; identification of ICT requirements
- b. Operationalisation phase – launch planning; continuous implementation of marketing & communications and stakeholder management plans; continuous implementation of governance model.

The governance structure will therefore include the constitution of a **steering committee** and **operational committee** inclusive of identified **work stream members** that will ensure the sustainability of the **InvestSA** One Stop Shop service offering. This will be established at National and Provincial level.

8.1 Role of the Steering Committee

The role of the Steering Committee is as follows:

- The Steering Committee will be established during the conceptualization phase and carry out assigned responsibilities during the operationalization phase.
- Ensures project or operational activities.
- Ensures project makes good use of assets.
- Assist with resolving strategic level issues and risks.
- Approve or reject changes to the project with a high impact on timelines and budget.
- Assess project progress and report on project to senior management and higher authorities.
- Provide advice and guidance on business issues facing the project.
- Use influence and authority to assist the project in achieving its outcomes.
- Review and approve final project deliverables.
- Oversee project planning; implementation and launch.
- Ensure compliance to PFMA and other Treasury and other prescripts.
- Develop operational manual for services to be rendered at the One Stop Shop.
- Ensure appropriate service standards for investors.
- Influence regulatory environment.
- Harmonize contribution of all parties at OSS.
- Quarterly monitoring; evaluation & reporting.
- Develop annual strategic plan.

8.2 Responsibilities of the Steering Committee Chairperson

The Steering Committee Chair is the Project Sponsor. Should the Project Sponsor be unable to attend a meeting, the deputy will serve as Committee Chair. Note that the Project Manager should not serve as Committee Chair in the absence of the Project Sponsor.

The responsibilities of the Steering Committee Chair are as follows:

- Sets the agenda for each meeting.
- Ensures that agendas and supporting materials are delivered to members in advance of meetings.
- Makes the purpose of each meeting clear to members and explains the agenda at the beginning of each meeting.
- Clarifies and summarizes what is happening throughout each meeting.
- Keeps the meeting moving by putting time limits on each agenda items and keeping all meetings to two hours or less.
- Encourages broad participation from members in discussion by calling on different people.
- Ends each meeting with a summary of decisions and assignments.
- Follows up with consistently absent members to determine if they wish to discontinue membership.
- Finds replacements for members who discontinue participation.

8.3 Responsibilities of the Steering Committee Members

Individual Steering Committee members have the following responsibilities:

- Understand the goals, objectives, and desired outcomes of the project.
- Understand and represent the interests of project stakeholders.
- Take a genuine interest in the project's outcomes and overall success.

- Act on opportunities to communicate positively about the project.
- Check that the project is making sensible financial decisions – especially in procurement and in responding to issues, risks and proposed project changes.
- Check that the project is aligned with the organizational strategy as well as policies and directions across government as a whole.
- Actively participate in meetings through attendance, discussion, and review of minutes, papers and other Steering Committee documents.
- Support open discussion and debate, and encourage fellow Steering Committee members to voice their insights.

9. General

This section provides information on Steering Committee membership, decision-making process, frequency of meetings, agenda, minutes and decision papers, and rules for proxies.

9.1 Membership

The table below lists the membership of the National & Provincial Steering Committees.

Note that project team members, including the Project Manager, **CANNOT** be members of the Steering Committee. As a governance body, the Steering Committee must be made up of people who are not working on a project and can therefore provide an objective assessment of whether or not a project is progressing successfully. However, it is common for the Project Manager to attend Steering Committee meetings to present information and answer questions. Other team members may attend as well if they are presenting a report, taking minutes, or providing other administrative or logistical support to the Steering Committee. Members should be selected based on their specialist knowledge, ability to represent the interests of stakeholders, and ability to help resolves issues the project may face.

National

<i>Name</i>	<i>Title</i>	<i>Organization</i>
<i>Yunus Hoosen</i>	Acting Head	<i>InvestSA</i>
<i>Amb Sadick Jaffer</i>	Chief Director	<i>InvestSA</i>
<i>Tina Reddy</i>	Deputy Director	<i>InvestSA</i>
<i>Rory Voller</i>	Commissioner	<i>CIPC</i>
<i>Sipho Zikode</i>	Deputy-Director General	<i>SEZ&ET</i>

Members of the Provincial Steering Committee will consist of the following representatives:

- Provincial Economic Development Department.
- CEO of the Investment Promotion Agency.
- General Managers of Agencies reporting to the Provincial Investment Promotion Agency.
- Key National & Provincial Partners.
- **InvestSA.**
- Metropolitan Municipality.
- SEZ / IDZs.
- Or any other key stakeholders.

9.2 Quorum and Decision-making

This section outlines how the Steering Committee will make decisions and the minimum number of members (or quorum) required for a decision to be valid.

9.2.1 Quorum

The Steering Committee will agree on the minimum members that will constitute a quorum for decision-making purposes.

9.2.2 Decision-making Process

This section describes the process the Steering Committee will use to make decisions.

Options are as follows:

- Unanimity: everyone agrees to a given course of action.
- Majority: a course of action requires support from more than 50% members who attend the meeting if there is quorum.
- 2/3 Majority: a course of action requires support from 2/3 of the members who attend the meeting if there is quorum.
- Consensus: a majority approve a given course of action, but that the minority agrees to go along with the course of action, potentially with some modifications.

Unanimity and consensus decision-making are the most difficult to manage and are not advised for Steering Committee meetings, especially if these models of decision-making are new to the group.

9.3 Frequency of Meetings

This section outlines the schedule for Steering Committee meetings. Ideally, this schedule is set out at the beginning of the project so that members can plan ahead and arrange their attendance. Steering Committee meetings are ideally timed to be at key milestones, which are set out in the Project or Annual Strategic Plan. Ideally the Steering Committee should meet quarterly.

9.4 Agenda, Minutes, and Decision Papers

A package will be sent to members three to five business days in advance of a Steering Committee meeting. This package will include the following:

- Agenda for upcoming meeting (in approved Steering Committee Meeting Agenda Template).
- Minutes of previous meeting (in approved Meeting Minutes template).
- A progress report for the project.
- Decision papers.
- Any other documents/information to be considered at the meeting.

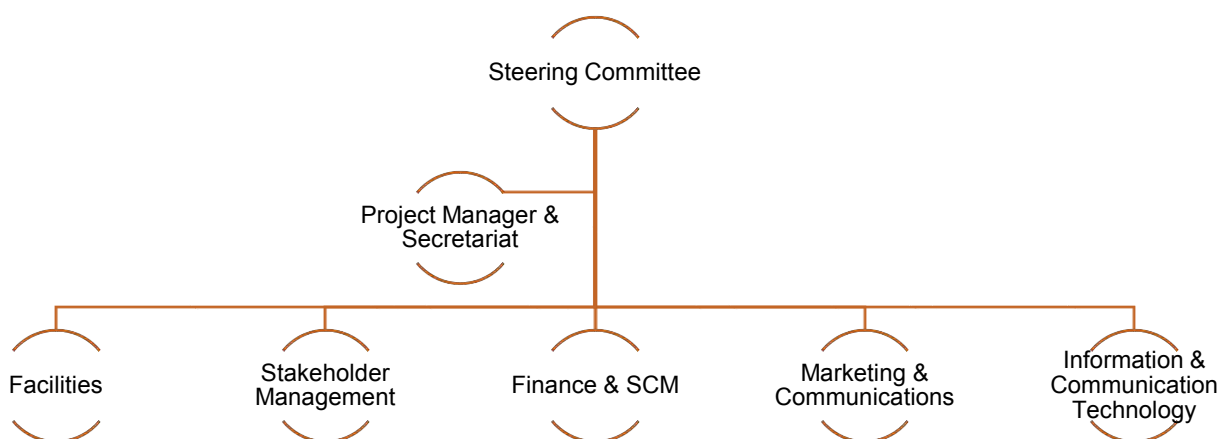
9.5 Proxies

This section outlines whether or not Steering Committees can send a proxy to a meeting, and if a proxy is sent to a meeting, whether or not that person can participate in discussion and the decision-making process. It is common for Steering Committees to not allow for proxies, and it is common if proxies are permitted for them to be limited to observing rather than participating in the meeting. It is advised that members of the Steering Committee cannot send proxies to meetings.

However, if proxies are delegated to participate in planned meetings, they will be entitled to participate in discussion but not allowed a role in decision-making. If proxies are permitted, Steering Committee members will inform the Project Sponsor as soon as possible if they intend to send a proxy to a meeting and no less than two business days before the scheduled meeting.

10 Work streams

Work streams will be established at Provincial level to ensure the establishment and effective functioning of the **InvestSA** One Stop Shops. These will be established at the conceptualization and planning phase and carry through all operational activities on a continuous basis. Work streams will meet monthly and will function as operational committee post the launch of the One Stop Shop: The diagram below illustrates an example of the work streams and linkage in the governance model:



10.1 Scope of the Workstreams

The Workstream Scope is as follows:

Workstreams are responsible for the delivery of identified milestones on the project plan on a continuous basis:

- Delegate tasks to appropriate staff.
- Support the prioritization of tasks identified in the project plan and by workstream members.
- Approve the Terms of Reference for each workstream.
- Resolve any issues or conflicts of requirements escalated from workstreams.
- Regularly review the status of each workstream.
- Approve the output reports and recommendations of each workstream.

Individual workstream responsibilities are:

Workstream	Responsibility	Lead
<i>Facilities</i>	Develop the specifications for the refurbishment of the identified site and ensure optimal operations after the establishment	Member identified by the PIPA
<i>Stakeholder Management</i>	Develop and implement the inclusive annual stakeholder manager plan	Member identified by the PIPA

Workstream	Responsibility	Lead
<i>Finance & Supply Chain Management</i>	Manage the allocated resources effectively and in accordance with applicable legislative prescripts	Member identified by the PIPA
<i>Marketing & Communications</i>	Develop and implementation an annual Marketing and Communications Plan in collaboration with the dti	Member identified by the PIPA
<i>Information & Communication Technology</i>	Manage the identification and operational functioning of identified information and communications technology in collaboration with the dti	Member identified by the PIPA

10.2 Membership and Appointment

Workstreams will implement all milestones assigned in accordance with the approved project or annual business plan. Members will consist of appropriate members from:

- Provincial Economic Development Department.
- Investment Promotion Agencies.
- SEZ / IDZs.
- National & Provincial Partners.
- Metropolitan Municipalities.
- District Municipalities.
- Or any other key stakeholders.

All meetings will be chaired by the Project Manager.

10.3 Basis for Reporting

The Project Manager on behalf of the workstream will:

- Arrange meetings as required, on at least a fortnightly basis.
- Circulate draft work plans for comment and finalise.
- Update the project plan.
- Circulate the notes of all workstream meetings to all members and consolidate in a monthly report.
- Update the workstreams on the overall project status and any changes proposed.
- Ensure completed workstream reports are consolidated and included in the next Steering Committee agenda.
- Ensure the digital recording of all project meetings.
- Ensure the drafting and circulation of all minutes and attendance registers within 14 days of meetings.
- Ensure proper record keeping.
- Follow up on agreed actions and outstanding activities.
- Ensures proper meeting management.

11 Monitoring & Evaluation Plan

11.1 Purpose

The monitoring and evaluation plan for the InvestSA One Stop Shop(OSS) initiative will serve two functions: firstly, the periodic assessment of the implementation and performance on its activities. Secondly, evaluation of the end results in terms of relevance, effectiveness and impact of the establishment and operations both at national and provincial level. The M&E system of the OSS initiative will provide answers on the progress and impact made by the services rendered inclusive of the contribution of all partner departments & agencies in facilitating foreign and domestic investment.

Performance: Performance evaluation will assess the successful achievement of the outputs based on the inputs provided and activities conducted. The actual performance will be monitored closely by InvestSA **the dti** through quarterly and annual reports.

Impact: Evaluation of the outcomes will be monitored continuously throughout the implementation process and operational activities. The key indicators listed in the logical framework, and the M&E matrix will guide the evaluation of the project results and impact. To do so reliably baseline data will be collected at the start of the operational activities, and impact data will be collected when appropriate during the implementation.

InvestSA-One Stop Shop Monitoring & Evaluation indicators

#	Key issues / questions	Indicators: changes in (+ or -)
1	Organisational capacity / group processes	Access to resources (human, financial, technical); leadership, vision and understanding of change; management
2	Effectiveness / efficiency	Efficiency measures ratings
3	Joint or partnership working	Involvement of the National Departments and agencies at OSS
4	Reporting frequency	Quarterly and yearly
5	Meeting Frequency	Monthly, quarterly and yearly
6	Stakeholder engagement frequency	Monthly, quarterly and yearly
7	OSS performance review	Quarterly and yearly

InvestSA-One Stop Shop Indicators & data collection methods

Issue / question & indicators	Data collection method	Frequency (including base line)
<i>Organisational capacity / group processes</i>	<ul style="list-style-type: none"> ▪ Self-evaluation ▪ Client questionnaire ▪ Stakeholder questionnaire 	Quarterly Annually Annually
<i>Effectiveness / efficiency</i>	<ul style="list-style-type: none"> ▪ Foot traffic data analysis (walk-ins; e-mail & telephonic inquiries; referrals; website traffic) ▪ Investor surveys ▪ Impact of analysis of marketing & communications activities ▪ Improved turn-around times for investor support requests 	Quarterly & annually Annually Annually Annually
<i>Joint or partnership working inter-governmentally</i>	<ul style="list-style-type: none"> ▪ Participation of partner departments / agencies in investor meetings ▪ Resolution of unblocking issues where applicable 	Assessed quarterly and annually
<i>Reporting frequency</i>	<ul style="list-style-type: none"> ▪ Marketing & Communications Plan implementation ▪ Stakeholder Management Plan implementation ▪ Investor inquiries & unblocking (email, walk-ins and telephonic) ▪ Committed investment projects summary 	Quarterly and annually
<i>Meeting Frequency</i>	<ul style="list-style-type: none"> ▪ Quarterly and annual meeting schedule ▪ Agendas and minutes of meetings ▪ Resolutions ▪ Reports 	Monthly, quarterly and annually
<i>Stakeholder engagement frequency</i>	<ul style="list-style-type: none"> ▪ Quarterly and annual meeting schedule ▪ Agendas and minutes of meetings ▪ Resolutions ▪ Reports 	Monthly, Quarterly and annually
<i>OSS performance review</i>	<ul style="list-style-type: none"> ▪ Statistical data on overall operational performance 	Annually

11.2 Analysing and using the information

Information is only useful if it is analysed and put to good use. A key purpose of monitoring is the OSS project implementation is to support internal decision making and planning, and also to ensure a periodical analysis, assessment, and the use the information collected.

11.2.1 Analysis

Analysing of the information will include:

- **Qualitative information**

This would include the assessment of the efficiency of the OSS facility in terms of delivering its services.

- **Quantitative information**

Calculation of investor inquiries, resolved & unresolved cases, OSS meetings held, and statistical data analysis that maybe applicable.

- **General**

InvestSA will also check the credibility, validity and reliability of the periodical information produced and improve on the collection methods if needs. **InvestSA** will should use the data to answer your initial key questions, which might also draw out learning for other stakeholders.

12 General reporting requirements

The following report template must be used as the basis for the standardized quarterly and annual reports. The report should include the following elements. It should be in A4 size format using font Aerial size 11 for text and size 12 for bold headings.

1. Cover page
2. Table of contents
3. Glossary
4. Narrative summary of progress
 - a. Marketing & Communications Plan (website development / web traffic; social media campaign; marketing brochures; video production etc.)
 - b. Stakeholder Engagements – Government; SEZ; Business; Investors & Diplomatic Core (this includes information sessions; seminars / conferences / workshops conducted or attended etc.)
 - c. Investor Inquiries & Unblocking (those escalated provincial / nationally and an indication whether resolved / unresolved)
 - d. Summary of Committed Investment Projects (in accordance with the **InvestSA** investment projects template)
5. Challenges & Resolutions
6. Appendices

13 Review

This document will be reviewed annually.