



INVITATION TO BID

Invitation to Bid	<i>End-term evaluation of the ASB's performance</i>
Bid Number	ASB/29/01/2024
Date of issue	22/01/2024
Closing Date and Time	19/02/2024 16:00
Contact details	For submission of quotations or any other enquiries: Email shereenp@asb.co.za (Please use BID No. as subject reference)

Board Members: Ms P Moalusi (Chair), Mr A van der Burgh (Deputy Chair), Mr C Braxton, Ms W de Jager,
Mr D Dlamini, Mr S Khan, Ms A Muller, Ms N Themba
Chief Executive Officer: Ms J Poggiolini

1. ABOUT THE ASB

1.1 The ASB's mandate is to set Standards of GRAP for public sector entities. The ASB is required by the Public Finance Management Act (PFMA) to set Standards of GRAP for the following entities:

- departments (including national, provincial and government components);
- public entities;
- trading entities (as defined in the PFMA);
- constitutional institutions;
- municipalities, municipal entities, or any other entities under the ownership control of a municipality and, boards, commissions, companies, corporations, and funds; and
- Parliament and the provincial legislatures.

1.2 Entities that meet certain criteria apply International Financial Reporting Standards. These criteria are determined by the Board and published by way of a Directive.

1.3 Where legislation requires that other Ministers determine a reporting framework for particular entities, for example, the Minister of Higher Education and Training for the public colleges, these Ministers may direct the entities to apply Standards of GRAP. At present, the public TVET and CET colleges apply Standards of GRAP.

1.4 In terms of section 89(d) of the PFMA, the ASB can also perform any activity incidental to advancing financial reporting in the public sector.

2. INVITATION FOR BID

2.1 The ASB requires the preparation of an "end-term evaluation report". This report is required in terms of the *Revised Framework for Strategic and Annual Plans* issued by the Department of Performance Monitoring and Evaluation (DPME).

Why the report is needed?

2.2 The ASB is a national public entity listed in Schedule 3A to the PFMA. In terms of the PFMA, the ASB is required to assess both its financial and non-financial performance each year. Non-financial performance is measured based on indicators (impact, outcome and output) that are aligned to the ASB's five-year strategic and one-year performance plan. The planning process to be applied by public entities and how they should measure non-financial performance is described in the *Revised Framework for Strategic and Annual Plans* (Framework) issued by the DPME [follow link to access the full document <https://www.treasury.gov.za/legislation/pfma/treasuryinstruction/Revised%20Framework%20for%20Strategic%20Plans%20and%20Annual%20Performance%20Plans.pdf>]

2.3 The five-year strategic planning cycle ends on 31 March 2025. In terms of the Framework issued by the DPME, an end-term evaluation report is required. The following paragraphs are extracts from the DPME's Framework (page 64):

End-term evaluations

End-term evaluations focus on programme or project results and how and why they were, or were not, achieved. They thus inform decisions such as whether to continue the intervention; how to improve it; and whether to scale it up or replicate it elsewhere. An end-term evaluation focuses on assessing whether the set outcomes have been met.

Purpose

End-term evaluations give an overview of how far an institution's programmes have achieved their intended outcomes and government priorities for the planning cycle,

Focus

An end-term evaluation is a comprehensive evaluation that assesses whether an implementation programme has successfully delivered on its intended outcomes and impacts as reflected in the programme's plans.

Outcome, outputs and activities to be assessed

- 2.4 The ASB's five-year strategic plan is available on the website: <https://www.asb.co.za/wp-content/uploads/2021/01/2.-Strategy-2020-2025-submitted-to-PEOU-19092019.pdf>
- 2.5 The ASB has one strategic outcome which is "*Enhanced financial reporting for better decision making and accountability*".
- 2.6 There are five strategic outputs with various activities that result in the achievement of this outcome. In terms of preparing the end-term evaluation, it is likely that the following activities will need to be assessed:
- Maintain and enhance existing Standards of GRAP and develop new standards where gaps are identified.
 - Undertake research to ensure Standards of GRAP respond to broader financial reporting needs.
 - Influence development of international standards.
 - Facilitate and encourage stakeholder engagement and support.

Required expertise and how they will be assessed

- 2.7 The experts required for this service should be skilled in performing data analytics, particularly in the context of measuring the impact of organisational strategies.

Duration of service

- 2.8 In terms of the Framework, the end-term evaluation report must be completed by July 2024. Work will commence on conclusion of the contract, and run until the final report is completed by 31 July 2024. The end-term evaluation report may need to serve at the ASB's governance structures in July 2024.

3. PROCUREMENT PRINCIPLES TO BE APPLIED

- 3.1 The ASB will apply the 80-20 principle in evaluating this bid. The procurement principles to be applied are as follows:

Phase I

- 3.2 Bids will be assessed against these functional criteria, using the points outlined in Table 1. Bidders must score at least 60/100 to move to the second phase of the assessment. A maximum of 80 points will be awarded for this phase.
- 3.3 To enable the ASB to evaluate the qualitative criteria, the evidence described in Table 1 must accompany the bidding documents. Bids will not be considered if supporting evidence is not provided for the criteria.

Table 1 – Criteria, supporting evidence and points for scoring functional criteria

Criteria	Supporting evidence	Points to be awarded
Demonstrated expertise in performing end-term evaluations (or equivalent) as described in the Framework issued by the DPME.	Reference letters for similar work performed at either public sector or non-governmental (or not-for-profit) organisations 20 points per letter.	

Phase 2

- 3.4 Bids that meet the threshold functionality criteria will move to the second phase. The second phase assesses price and B-BBEE. The ASB will use the 80/20 preference points system. See section 9 on sub-contracting below.

Administration

- 3.5 Bidders will be notified in writing about whether they have been successful or not.

4. Points awarded for price

4.1 The 80/20 preference point systems

- (a) A maximum of 80 points is allocated for price on the following basis:

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

Where

- Ps = Points scored for price of quotation under consideration
Pt = Price of quotation under consideration
Pmin = Price of lowest acceptable quotation

- (b) A maximum of 20 points may be awarded to a tenderer for the empowerment goals specified for the bid using paragraph 4.2.
- (c) The points scored for the empowerment goal will be added to the points scored for price and the total will be rounded off to the nearest two decimal places
- (d) The contract will be awarded to the tenderer scoring the highest points.
- 4.2 The ASB's empowerment goals are as follows:
- (a) The ASB endeavours to protect or advance persons or categories of persons disadvantaged by unfair discrimination of the past through allocation of contracts as provided for in section 2(1) of the Preferential Procurement Policy Framework Act (PPPFA).
- (b) The ASB's goals in this procurement are outlined in the table below:

Empowerment goal	Target	Points allocated	Method of verification
Black person/s with at least 51% ownership		10	B-BBEE certificate, or Sworn Affidavit, or Report from Central Supplier Database (which is not older than 24 months).
Black women with at least 30% ownership		5	
Black person/s with disabilities with at least 30% ownership		5	
Total		20	

5. SUB-CONTRACTING

- 5.1 A supplier awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract outlined in this RFQ.
- 5.2 If the supplier intends to sub-contract, they must indicate the value of the work in Rands to be sub-contracted in relation to the total quoted amount. The supplier must also indicate the name(s) of the company / contractor and experience in terms of this TOR.

6. MANDATORY DOCUMENTS TO BE SUBMITTED

- 6.1 Interested service providers must comply with the minimum conditions outlined in Section 3 of this Invitation to Bid. Failure to meet the requirements and/or provide the necessary supporting evidence, will render the proposal non-responsive and will be disqualified.
- 6.2 Service providers are required to complete and submit appropriately signed Standard Bid Documents (SBDs), failing which their bid response will be disqualified. These documents are as follows:
- SBD 1 – Invitation to bid – and all related documents
 - SBD 4 – Declaration of interest.
 - SBD 6.1 – Preference Points Claim Form In Terms of The Preferential Procurement Regulations 2022
 - SBD 8 – Declaration Of Bidder's past Supply Chain Management Practices
 - SBD 9 – Certificate of Independent Bid Determination
 - SBD 3.3 – Pricing schedule for professional Services
 - CSD Registration number
 - Tax Compliance Certificate/Tax PIN.
 - Documents supporting verification of goals, including a B-BBEE certificate, or Sworn Affidavit, or Report from Central Supplier Database (which is not older than 24 months).
 - The ASB may request additional information if Instruction Notes, Guidelines and other documents related to the implementation of the Preferential Procurement Regulations 2022 (PPR 2022) are published by the National Treasury.
- 6.3 In case of proposal from a joint venture, the following must be submitted together with the proposal:
- Joint venture agreement including split of work signed by both parties.
 - The original or certified copy of the B-BBEE certificate of the joint venture.

- The Tax Clearance Certificate of each joint venture member.
- Proof of ownership/shareholder certificates/copies.
- Company registration certificates.

6.4 Bids submitted should be valid for 60 days from date of closure of the Invitation to Bid.

7. ELIMINATION CRITERIA

Bidders will be eliminated under the following conditions:

- The required documents outlined in sections 3, 4 and 6 are not submitted .
- Proposals are submitted late. The closing date and time is 19/02/2024 16:00
- Submission to incorrect email address **(Please submit electronically to info@asb.co.za)**

8. CANCELLATION OR NO AWARD

The ASB reserves the right, in terms of the relevant legislation and regulations, to cancel or not award the bid.

9. PROTECTION OF PERSONAL INFORMATION

The Protection of Personal Information Act, 4 of 2013 (POPIA) provides that when one processes another's personal information, such collection, retention, dissemination and use of that person's personal information must be done in a lawful and transparent manner. To evaluate the bids received, the ASB will process bidders personal information. Personal information will not be used for other purposes.