



**social development**

Department:  
Social Development  
REPUBLIC OF SOUTH AFRICA

Private Bag X901, Pretoria, 0001

Enquiries: Z Mantantana, Email: [ZolisaM@dsd.gov.za](mailto:ZolisaM@dsd.gov.za)

**Sir/Madam**

**REQUEST FOR PROPOSALS FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE  
PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF  
CONVERGENCE TOOL**

1. Tender No: **SD03/2022**
2. Closing Date: 20 June 2022 at 11:00
3. The following documents form part of this invitation for a proposal:
  - SBD1: Invitation to bid
  - SBD3.3: Pricing Schedule
  - SBD4: Declaration of Interest
  - SBD6.1: Preference points Claim Form
4. **All the documents accompanying this invitation must please be completed in detail, where applicable and returned with your Bid.**
5. Please make sure that your bid reaches this office before the closing time and date
6. When submitting your bid the following information must appear on the sealed envelope:
  - i. Name and address of the Bidder
  - ii. Bid number
  - iii. Closing Date
7. This envelope can be placed in the Bid box in the foyer at HSRC Building, 134 Pretorius Street, Pretoria
8. Compulsory briefing session

Kind regards

**DIRECTOR: SUPPLY CHAIN MANAGEMENT**

DATE: 27/05/2022

## PART A INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NATIONAL DEPARTMENT OF SOCIAL DEVELOPMENT)</b>					
BID NUMBER:	SD03/2022	CLOSING DATE:	20 JUNE 2022	CLOSING TIME:	11:00
DESCRIPTION	APPOINTMENT OF SERVICE PROVIDER FOR THE PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF CONVERGENCE TOOL				
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT HSRC Building, 134 Pretorius Street, Pretoria					
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
		TCS PIN:		OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]		<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes
		<input type="checkbox"/> No			<input type="checkbox"/> No
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX		<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)		
		<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)		
		<input type="checkbox"/>	A REGISTERED AUDITOR		
		<input type="checkbox"/>	NAME:		
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs&amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	
		[IF YES ENCLOSE PROOF]		[IF YES ANSWER PART B:3 BELOW ]	
SIGNATURE OF BIDDER				DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)					
TOTAL NUMBER OF ITEMS OFFERED					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>			<b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>		
DEPARTMENT/ PUBLIC ENTITY	Social Development		CONTACT PERSON	Ms M Nkhethoa	
CONTACT PERSON	Mr Z Mantantana		TELEPHONE NUMBER		
TELEPHONE NUMBER			FACSIMILE NUMBER		
FACSIMILE NUMBER			E-MAIL ADDRESS	MapasekaN@dsd.gov.za	
E-MAIL ADDRESS	ZolisaM@dsd.gov.za				

## PART B

### TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>	
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR ONLINE
1.3.	BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: ( BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.4.	WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.5.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
<b>2. TAX COMPLIANCE REQUIREMENTS</b>	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE <a href="http://WWW.SARS.GOV.ZA">WWW.SARS.GOV.ZA</a> .
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA/ JOINT VENTURES/ SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>	
3.1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>
<p>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.</p>	

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

**PRICING SCHEDULE**  
(Professional Services)

BID NO: SD03/2022

CLOSING TIME 11:00 ON 20 JUNE 2022

NAME OF SERVICE PROVIDER:

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF VAVULE ADDED TAX
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**APPOINTMENT OF A SERVICE PROVIDER FOR THE PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF CONVERGENCE TOOL**

1. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION

HOURLY RATE

DAILY RATE

.....

R.....

.....

.....

R.....

.....

.....

R.....

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R.....

.....

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R.....

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5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

.....

R.....

..... days

.....

R.....

..... days

.....

R.....

..... days

.....

R.....

..... days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED

RATE

QUANTITY

AMOUNT

.....

.....

.....

R.....

.....

.....

.....

R.....

.....

.....

.....

R.....

.....

.....

.....

R.....

Name of Bidder: .....

TOTAL: R.....

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	.....	.....	R.....
.....	.....	.....	R.....
.....	.....	.....	R.....
.....	.....	.....	R.....

TOTAL: R.....

6. Period required for commencement with project after acceptance of bid .....
7. Estimated man-days for completion of project .....
8. Are the rates quoted firm for the full period of contract? \*YES/NO
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index. ....
- .....
- .....
- .....

Any enquiries regarding bidding procedures may be directed to the –

Mr. Zolisa Mantantana  
Email: [ZolisaM@dsd.gov.za](mailto:ZolisaM@dsd.gov.za)

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

with any person who is employed by the procuring institution? YES/NO

2.2.1 If so, furnish particulars:

.....  
 .....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? YES/NO

2.3.1 If so, furnish particulars:

.....  
 .....

### 3 DECLARATION

I, \_\_\_\_\_ the \_\_\_\_\_ undersigned,  
 (name)..... in  
 submitting the accompanying bid, do hereby make the following  
 statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	.....
Signature	Date
.....	.....
Position	Name of bidder



## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

a) The value of this bid is estimated **not to exceed** R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
<b>PRICE</b>	<b>80</b>
<b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>	<b>20</b>
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

## 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

## 3. POINTS AWARDED FOR PRICE

### 3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

**80/20**

**or**

**90/10**

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of bid under consideration

$P_{\min}$  = Price of lowest acceptable bid

## 4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

## 5. BID DECLARATION

- 5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

## 6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: . = .....(maximum of 10 or 20 points)  
(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

## 7. SUB-CONTRACTING

- 7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES		NO	
-----	--	----	--

- 7.1.1 If yes, indicate:

- What percentage of the contract will be subcontracted.....%
- The name of the sub-contractor.....
- The B-BBEE status level of the sub-contractor.....
- Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	
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- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at least 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		

Black people who are military veterans		
<b>OR</b>		
Any EME		
Any QSE		

## 8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name \_\_\_\_\_ of  
company/firm:.....

8.2 VAT \_\_\_\_\_ registration  
number:.....

8.3 Company \_\_\_\_\_ registration  
number:.....

### 8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
  - ☐ One person business/sole propriety
  - ☐ Close corporation
  - ☐ Company
  - ☐ (Pty) Limited
- [TICK APPLICABLE BOX]

### 8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....  
 .....  
 .....  
 .....  
 .....

### 8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
  - ☐ Supplier
  - ☐ Professional service provider
  - ☐ Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a

fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution.

**WITNESSES**

1. ....

2. ....

.....  
SIGNATURE(S) OF BIDDERS(S)

DATE: .....

ADDRESS .....

.....

.....



# social development

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Department:  
Social Development  
**REPUBLIC OF SOUTH AFRICA**

## **TERMS OF REFERENCE**

### **REQUEST FOR PROPOSAL**

**TERMS OF REFERENCE FOR THE PROCUREMENT,  
IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT  
OF CONVERGENCE TOOL**

## **TERMS OF REFERENCE (TOR)**

### **TERMS OF REFERENCE FOR THE PROCUREMENT, IMPLEMENTATION, CONFIGURATION, MAINTENANCE AND SUPPORT OF CONVERGENCE TOOL**

#### **1 PURPOSE**

- 1.1 The purpose of this is to request a proposal for procurement, implementation, configuration, maintenance and support of convergence tool.

#### **2 PROJECT NAME**

- 2.1 Convergence Integration System, abbreviated as CIS.

#### **3 BACKGROUND**

- 3.1 The distribution and access of social services remains skewed horizontally and vertically within the government, therefore the access of social protection services to poor and vulnerable communities is crucial. This is aggravated by lack of a platform that can assist in pulling and pushing data from different data sources from whatever technology platform data might be.
- 3.2 One of the government strategies talks of a comprehensive social protection system focusing on a minimum standard which is linked to a social wage or a social floor. The Department of Social Development is leading this strategy. Currently some departments/ stakeholders have automated their respective core processes which contributes on towards comprehensive social protection system. This automation is running silo on different technology stack.
- 3.3 DSD intends to integrate all existing data sets to enable the information exchange with other Government Departments. DSD has an integrated case management solution called Social Development Integrated Case Management System (SDICMS) which is built on Microsoft ASP.NET and database based on SQL 2008 R2 and also has other silo systems which are also on Microsoft platform. Other DSD provincial systems are not on Microsoft technology.
- 3.4 National DSD provide system/s that are implemented throughout the country by either DSD officials or citizen.

## **4 PROBLEM STATEMENT AND CURRENT SITUATION**

### **4.1 Problem Statement**

4.1.1 The NDP 2030 advocates for the improvement of the lives of poor and vulnerable communities, families and especially children. The MTSF outlines in Outcome 13 the development and implementation of an integrated social protection information system that will promote the sharing of data and uniform reporting throughout the government to enhance services to poor and vulnerable communities and families.

4.1.2 This will address a number of challenges related to social protection intervention i.e. such as over and under reporting; discrepancies in terms of reporting; fragmentation and misalignment of information; poor and vulnerable people falling through the cracks and not accessing interventions; departments maintains their own database of poor beneficiaries with limited information sharing on poor and vulnerable citizens which is also not updated regularly.

4.1.3 A key solution is to have an integrated view of the entire social protection system across government this will be an excellent tool for improved services and interventions, whereby real time quality data will be stored centrally and accessed throughout government.

### **4.2 Current Situation**

4.2.1 Government departments have invested on technology regarding the automation of services that are rendered to the public. However, the automation has been taking place at individual department levels and not at a Government-Wide level, this has resulted in many parallel systems that are not complementing each other albeit sharing the same client information in some cases.



- 4.2.2 Currently silo systems across government on social protection interventions leads to duplications, insufficient tracking, monitoring and reporting which aggravate inadequate benefits for poor and vulnerable citizens.
- 4.2.3 Currently social protection operates with delivery gaps created by silo systems which has client data, lack of enterprise content taxonomy, unverified data by third parties, and unstructured engagements with citizens across government. It will be beneficial for government to have real time quality data on accessing of services and to improve the social protection targeting.

## **5 SCOPE OF WORK**

- In order to ensure that all problems are addressed, it is recommended that a fully functional convergence tool is procured, implemented, configured and maintained.
- A successful bidder will have to comply to all the requirements as listed in this section of the document. It is envisioned that a successful bidder will engage in a full contract with the DSD.
- A detailed Service Level Agreement (SLA) will be required for a period of no longer than 36 months. For evaluation purposes a Next Business Day (NBD) response will be required in the bidder's proposal.
- Project Management services will be provided by the successful bidder for the duration of the project. All project management deliverables will be included for the total duration of the project.

### **5.1 Functional Requirements**

All functional requirements are seen as mandatory for the proposal. Where applicable specific sub-areas will be listed that will be needed for the successful completion of this project.

- 5.1.1 The bidder is to demonstrate its ability to monitor an orchestrated convergence layer end to end.
- 5.1.2 Develop a comprehensive data dictionary and monitoring and evaluation framework for core DSD processes.
- 5.1.3 Develop Information Control Document (ICD) for identified integration messages between departments at any point in time.
- 5.1.4 The bidder is to provide details around its capabilities to monitor end to end real data as well as the creation and monitoring of end user transactions.
- 5.1.5 The Bidder is to provide details on how its proposed solution will assist the DSD with the vision of integrating databases to improve data sharing, system availability, stability and performance.
- 5.1.6 The bidder must list the value the proposed solution can deliver to the DSD.
- 5.1.7 List all capabilities and functionality available through the proposed solution.
- 5.1.8 Be able to pull and push information.
- 5.1.9 Support any technology.
- 5.1.10 Analysis. Bidder will be expected to perform a full analysis of the environment and will be required to provide a detailed User Requirement Specification (URS) as well as Functional Requirement Specification (FRS). These requirements will be used in order to perform requirements analysis as well Key Performance Indicators (KPIs) for the success of the total project.
- 5.1.11 Attribute Based Management.
- 5.1.12 Agent Based Management. The convergence tool will have the ability to connect to agents on specific systems in order to report on specified metrics.

- 5.1.13 **Agentless Management.** The convergence tool will have the ability to collect and report on systems (where applicable) without installing agents for the system.
- 5.1.14 It is also envisioned that the the tool will work across security boundaries (such Active Directory (AD) forests and domains) in order to collect and report on metrics for systems that are outside the control of National DSD. This is a critical function for reporting on provincial systems.
- 5.1.15 **Custom Thresholds.** The tool should have the ability to create custom thresholds to be used for raising alerts based on data sharing.
- 5.1.16 **Reporting.** It is envisioned that the tool will have out-of-the-box reports available, custom reports must all be available for administrators of the system to generate specific reports as and when required.
- 5.1.17 **Security.** The tool must be secure, and must have full Role Based Access Controls (RBACs) available out-of-the-box. The ability to create custom roles is seen as mandatory requirement.
- 5.1.18 **Knowledge Transfer.** It is envisioned that a successful bidder will ensure that identified departmental administrators are provided with the necessary skills and knowledge to perform common day-to-day activities. Knowledge transfer will occur during the implementation of the tool within the DSD environment. Knowledge transfer will occur on an informal manner and must not be confused with the formal training addressed latter in this document.
- 5.1.19 **Training.** A successful bidder will include formal training for 5 (five) identified DSD Administrative users. This training will be Instructor Led Training (ILT) and will be provided by a suitably qualified training institution. Where applicable a bidder will provide a list of qualifications that can be achieved for the tool and up to what level a DSD administrator will be trained.

5.1.20 DSD will at all times retain ownership of all proprietary rights in relation to data. Data must at all times be hosted within the infrastructure of DSD and never at any point must DSD data be hosted out of the borders of RSA.

## **6 GENERAL REQUIREMENTS**

6.1 The General Conditions of Contract (GCC) as prescribed by National Treasury (NT) will be applicable in all instances.

## **7 DISQUALIFYING CRITERIA**

7.1 The following are seen as disqualifying criteria, which will result in a bidder's proposal not being evaluated:

7.1.1 Failure to submit a valid Tax Clearance Certificate;

7.1.2 Failure to complete and sign bid documents;

7.1.3 Scoring less than 75% in respect of functionality;

7.1.4 Late submission of the proposal;

7.1.5 Failure to attend the compulsory briefing session (if any has been arranged); and

7.1.6 Not complying with all the listed minimum business requirements criteria as listed.

## **8 DELIVERABLES/OUTPUTS**

8.1 The following deliverables are expected from this project:

8.1.1 All analysis documentation. Including detailed URS(s) and FRS(s);

8.1.2 A fully functional APM tool that complies and conforms to the requirements as identified by the analysis phase of this project;

8.1.3 Detailed project management reports for the duration of the project;

8.1.4 A detailed Maintenance and Support SLA for a period of 36 months that will be entered into between the Service Provider (SP) and the DSD at the successful implementation and configuration of the APM tool; and

8.1.5 A detailed formal training plan for administrators.

## **9 TIMEFRAMES**

- 9.1 Development and customisation is expected to take 12 months followed by maintenance and support;
- 9.2 Maintenance and Support phase – this phase will cover 36 months after the first two phases have been completed and will be backed by a detailed SLA.

## **10 BID PROPOSAL**

- 10.1 The comprehensive proposal submission should include:
  - 10.1.1 A detailed plan reflecting activity, project time frames, skills transference, costing and outputs;
  - 10.1.2 Profile of company including a description of similar work undertaken;
  - 10.1.3 Number, names and resumes (abbreviated CVs) of the person assigned to the project;
  - 10.1.4 A summary of the roles, responsibilities and time spent by each Person;
  - 10.1.5 The cost structure should be inclusive and as detailed as possible;
  - 10.1.6 The service provider is expected to enter into a contract with the DSD based on the proposal; and
  - 10.1.7 A work plan indicating time frames should be provided with the proposal. Progress will be monitored monthly based on the work plan and time frames provided by the service provider approved by the DSD.

## **11 PROPRIETARY RIGHTS**

- 11.1 The following should be taken into consideration for rights transfers:
  - 11.1.1 The DSD shall become the owner of source code that must be handed over to the Department after completion of the project, documents, advice and reports produced;
  - 11.1.2 The copyrights of source code, all documents and reports compiled by the service provider will vest in the DSD and may not be reproduced, distributed or made available without the written consent and approval of the DSD; and
  - 11.1.3 All information, documents and reports must be regarded as confidential until made public by the DSD.

## 12 EVALUATION CRITERIA

12.1 The evaluation of the bids will be conducted in two phases:

12.1.1 Firstly, the proposals will be evaluated on functionality. An evaluation panel will allocate points (scale 1-5) in respect of functionality according to the criteria set-out in **Error! Reference source not found.** below. Proposals scoring less than 75% in respect of functionality will be disqualified and not be evaluated further.

Table 12-1: Evaluation Matrix

No.	ELEMENT/CRITERIA	Details	1	2	3	4	5	Weight
1.	<b>Organizational Capabilities</b>	Maturity of Data practices to handle data store transformation team size of Analytics & Data Management teams, Data Product or tools. Awards, accolades and certification for projects done e.g. Mention in Gartner or Forester report for managed service provider or similar reports.  Provide at least 2 (two) reference sites with evidence where work of a similar nature has been performed.						15
2.	<b>Project Understanding &amp; governance</b>	Understanding of Scope of work, skills, capability, capacity and solution requirements as per SOW. Provide a detailed project plan						20
3.	<b>Technical Capabilities</b>	Integration: Handle multiple input data types and able to support multiple sources. e.g. Pre-Built connectors & Integrated Scheduler, Application of Data, AI/ML models, pipeline. Ability to have smart cataloguing of information assets e.g. data, ML models, pipeline, Reports.  Ability to manage business Glossary & Tags. Offer interactive data visualization and the proposed tool should support different input data types and frequencies. User Management, Personal Based Access with Audit capabilities.						30
4.	<b>Solution Design</b>	Overall solution proposition meeting function and technical requirements effectively. Multi Cloud support (flexibility to install)						20
5	<b>Maintenance Plan</b>	Provide detailed three years maintenance plan.						15
	<b>TOTAL</b>							100

12.2 Thereafter, only the qualifying bids will be evaluated in terms of the 80/20 preference points system as contemplated in the Preference Procurement Regulations 2017 issued in terms of Preferential Procurement Policy Framework Act (Act 5 of 2000).

- 12.2 The 80 points will be used to calculate points for price only and 20 points will be used to calculate points for BBBEE status levels of contribution (SBD 6.1). Prospective service providers are required to complete the SBD 6.1.
- 12.3 The points in respect of price will be calculated on the ceiling price for the project (inclusive of the professional fees).
- 12.4 PLEASE NOTE: SBD 6.1 attached for claiming above-mentioned points, if not completed the bidder will automatically score 0 points.
- 12.5 The rating will be as follows:
- 1 – Very Poor
  - 2 – Poor
  - 3 – Average
  - 4 – Good
  - 5 – Very Good

### **13 FACILITIES TO BE PROVIDED BY THE DSD**

- 13.1 During the project the DSD officials will make themselves available for clarity, reporting processes, discussions and meetings. The service provider will also have access to required documents, systems, infrastructure and other records available within the Department that may assist in executing the project.

### **14 REPORTING ARRANGEMENTS**

- 14.1 All deliverables should be submitted to the DSD. Any deliverable submitted and not accepted must be reworked and resubmitted at no additional cost.
- 14.2 The service provider will provide a single overall project manager.
- 14.3 A comprehensive monthly report will be submitted by the service provider.

### **15 TARRIFS AND PAYMENTS**

- 15.1 Payment will be affected within 30 days after receipt of a satisfactory detailed invoice from the successful service provider.
- 15.2 Payment will be made in accordance with the completion of work to the satisfaction of the DSD based on the milestone for the project agreed to and signed off as part of the implementation plan.

## 16 SPECIAL CONDITIONS OF THE CONTRACT

- 16.1 The Department will enter into a contract/ service level agreement with the successful/ appointed service provider.
- 16.2 The Department reserves the right not to appoint the service provider should it deem fit to do so.
- 16.3 The successful service provider will be required to undergo security clearance should the Department deem it necessary.
- 16.4 The successful service provider shall not cede the contract or any part thereof to any other person or third party. The successful/ appointed will therefore remain the sole responsibility agent for the project as a whole.
- 16.5 The department will furnish the successful/ appointed service provider with all the relevant information and available data within their possession that may be necessary for the service provider to perform duties.
- 16.6 All information, documents, and reports not currently in public domain and used during the development of the system or generated from the project must be regarded as confidential and may not be made available to any unauthorized person or institution without permission of the Accounting Officer or delegate.
- 16.7 The DSD will become the owner of all information, documents, reports and advice collected and compiled during the execution of the project.
- 16.8 Copyright of all documents and reports generated will vest in DSD and may not be reproduced, distributed or made available in any manner to public or third parties without written permission of the Accounting Officer or delegate.

## 17. SUBMISSIONS

- 17.1 Prospective bidders must submit their bids proposals in **two envelopes**:
- 17.2 One envelope with the **technical proposal** outlining in detail a realistic work-break schedule indicating different milestones to be achieved, and response to the terms of reference and evaluation criteria including other supportive



documents, completed bid forms, tax clearance certificate issued by SARS and legal entity registration certificate.

17.3 One **other envelope** with the **financial proposal** (pricing schedule (SBD 3.3) with all cost related items, cost breakdown).

17.4 The entire proposal should be placed on disc in a PDF format

17.5 The following information must be endorsed on each envelope:

**Bid number:**

**Closing date:**

**Name of the Bidder:**

**Technical Proposal or Financial Proposal**

17.6 The closing date for the submission of bid is **11h00 on 20 June 2022**.

17.7 Failure to comply with these conditions will result in a bid being disqualified.

17.8 Bids may only be submitted as follows:

Deposited in the DSD Tender  
Box,

Foyer of the HSRC Building

134 Pretorius Street

Pretoria

17.9 Bids received after the closing date and time will be regarded as late and will not be evaluated.

## **18 CONTACT PERSONS**

18.1 Enquiries may be directed to:

Mr Z Mantantana

Email: [ZolisaM@dsd.gov.za](mailto:ZolisaM@dsd.gov.za)

**Technical** related enquiries may be directed to:

Ms M Nkhethoa

Email: [MapasekaN@dsd.gov.za](mailto:MapasekaN@dsd.gov.za)

**NB:** Please include both officials on any enquiry