

## TERMS OF REFERENCE



### **THE PRESIDENCY REPUBLIC OF SOUTH AFRICA SUPPLY CHAIN MANAGEMENT**

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**REF NO: SCMP 19/03/01R: APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE SURVEY DEVELOPMENT, ANALYSIS SERVICES AND FOCUS GROUPS ON THE EFFECTIVENESS OF THE APPROVED FLEXIBLE WORKING CONDITIONS GUIDELINES IN THE PRESIDENCY OFFICES (PRETORIA, CAPE TOWN AND DURBAN) FOR A PERIOD OF TWO (2) MONTHS.**

#### **1. PURPOSE**

- 1.1 The purpose of these terms of reference is to invite bidders to submit bids for the provision of survey development, analysis and focus groups services to assess the effectiveness of The Presidency approved flexible working conditions guidelines for a period of two (2) months.

#### **2. BACKGROUND**

- 2.1 The response to the COVID-19 pandemic and associated recovery actions required fundamental cultural change in The Presidency, working towards the new 'normal', which included introducing flexible working conditions.
- 2.2 The Presidency does not have enough capacity, therefore seeks to appoint a service provider to conduct a survey and face to face focus groups aimed at assessing the effectiveness of the flexible working conditions based on the approved Flexible Working Conditions Guidelines hereafter referred "The Guidelines". The Guidelines are being implemented since June 2024 in all The Presidency offices: Pretoria- 450 employees; Cape Town- 48 employees and Durban – 8 employees based on the staff head count as of February 2025.

#### **3. SCOPE OF WORK**

The appointed service provider will be required to:

- 3.1 Develop a comprehensive survey and survey questions tailored to The Presidency's needs.
- 3.2 Conduct pilot testing to ensure the survey's effectiveness.

- 3.3 Collect and analyse survey and face to face focus groups responses from a sample size of 506 participants.
- 3.4 Provide a detailed report with actionable recommendations based on the findings.
- 3.5 Ensure compliance with data protection regulations, such as the **POPIA Act**.
- 3.6 The assignment will be carried out through three (3) phases outlined below:

### **3.6.1 PHASE 1**

This phase will entail:

- 3.6.1.1 Employee Health and Wellness Sub-Unit, hereafter referred to as “EHW” and the appointed service provider shall have an inception meeting to discuss the project, provide the service provider with the approved Guidelines and agree on timeframes before starting the project.
- 3.6.1.2 EHW; Directorates: Information Communication & Technology and Internal Communication and the service provider shall have a briefing session to agree on roles and responsibilities and timeframes.
- 3.6.1.3 The service provider will develop a comprehensive survey tailored to The Presidency’s needs, and send it to EHW for approval.
- 3.6.1.4 Conduct pilot testing to ensure the survey’s effectiveness.
- 3.6.1.5 EHW to provide the appointed service provider with the list of employees and their office locations who will need face to face assistance to complete the survey.

### **3.6.2 PHASE 2**

The service provider will:

- 3.6.2.1 With the assistance of EHW convene face-to-face meetings to assist the employees who will need support in completing the survey to do so within seven (7) days, before the start of the online departmental survey.
- 3.6.2.2 Collect online survey responses within ten (10) days from employees other than those reflected in paragraph 3.6.2.1 above.
- 3.6.2.3 Conduct focus groups with a minimum of sixty (60) employees within ten (10) days at least representing all salary levels and categories (level 2-15).
- 3.6.2.4 Analyse survey and focus groups responses from a sample size of five hundred and six (506) employees.

### 3.6.3 PHASE 3

The Service Provider will:

- 3.6.3.1 Submit the report with findings & recommendations within twenty one (21) days after conclusion of the Survey and focus groups.
- 3.6.3.2 Present the report to The Presidency two (2) different management structure/s, as per invitation.

## 4. REQUIREMENT FOR THE PROJECT

- 4.1 **Project Leader's** must have an Honours degree in either Statistics/Econometrics/Mathematics/Data Science **qualification** (NQF level 8).
- 4.2 **Team members** must have Bachelor's degree in Statistics or Econometrics/Mathematics **qualification** (NQF level 7).
- 4.3 **Project Leader** must demonstrate **experience** in designing, conducting surveys using online systems, & analysing, including facilitating focus groups (must attach CV with a minimum of four (4) years' experience);
- 4.4 **Team members experience** as data analysts, four (4) of them in number with minimum of two (2) years' **experience** in data analysis, facilitating focus groups and qualitative report writing skills:.
- 4.5 **Company experience-** Bidder must demonstrate experience in designing of online survey, facilitating focus groups, excellent communication skills, analysis and report- writing with minimum of four (4) years for institutions with over 500 respondents: The Presidency original returnable project reference form must be attached (**Annexure A**).
- 4.6 **Methodology:** Development and implementation of a **project plan** outlining the proposed approach to completing the project with timeline, tools/software to be used and key team members to be assigned to the project.

## 5. SPECIAL CONDITIONS OF PROJECT/CONTRACT

- The successful bidder will be required to sign a standard contract with The Presidency that will outline the terms and conditions of the contract.
- Proposal must include cost breakdown as per the attached Pricing schedule
- The Presidency reserves the right either to award the bid in full or in part or not to award the bid.
- The service provider will commence with the services upon signing of the service level agreement by all parties involved.
- In the event of changes in the project, the service must provide the detailed CVs, proof of qualification for the new project team members. The new project team members will be subjected to the security clearance process prior to confirmation of involvement in the project.
- The Presidency undertakes to pay out in full within thirty days (30) after, all valid

claims for services rendered to its satisfaction upon presentation of a substantiated claim/invoice, according to the payment schedule agreed upon in the contract.

- Bidder/s are requested to provide clarity on concept document / methodology to approach the project and a detailed project plan.

## **6. DURATION OF CONTRACT**

- 6.1 The duration of the project is two (2) months and specific milestones must be reached within this period.

## **7. MONITORING AND EVALUATION OF THE PROJECT**

- 7.1 All work is to be carried out in accordance with the time schedule as agreed with the Project Manager and within the agreed deliverable and terms and conditions of the signed contract.
- 7.2 Monitoring and evaluation of performance and adherence to the project requirement will be done by the Project Manager/owner.

## **8. LEGISLATIONS APPLICABLE TO THE BID**

Bids will be subject to the Supply Chain Management (SCM) conditions as follows:

- 8.1 The Preferential Procurement Policy Framework Act, Act No. 05 of 2000
- 8.2 Preferential Procurement Regulations, 2022.
- 8.3 The Public Finance Management Act, Act 1 of 1999.
- 8.4 The Presidency Supply Chain Management Policy.

## **9. SPECIAL CONDITIONS AND REQUIREMENTS OF THE BID**





- 9.1 Only bidders who score at least 65 points and above for the functionality information will be evaluated further on price and specific goals.
- 9.2 Pricing schedule must be attached.
- 9.3 Contract commencing on date of appointment until finalisation of the Survey and presentation to management structures.
- 9.4 The contract may be terminated by The Presidency during its period after fourteen (14) days written notice, if the contractor is negligent or does not perform in accordance with the contractual stipulations, Proposal documents, proposals received and service level agreement to be entered into.
- 9.5 Payment will be made within 30 days after receipt of a valid invoice.
- 9.6 Payment upon completion of each Phase of the project and upon submission of a draft report attached to each Phase to the satisfaction and quality criteria of the Presidency.
- 9.7 Final payment will be processed upon completion of the project to the satisfaction as per the criteria and quality for the Presidency.
- 9.8 Ensure that the human resources deployed to this project have the necessary knowledge in development, implementing and analyzing surveys aimed at assessing the effectiveness of departmental policies or guidelines and capacity to successfully undertake the abovementioned deliverables.
- 9.9 The duration of the project is two (2) months and specific milestones must be reached within this period.
- 9.10 The successful service provider will have to enter into a service level agreement (SLA) or special conditions of contract with The Presidency.
- 9.12 The Presidency reserves the right not to award this contract.

## 10. EVALUATION PROCESS

A three (3) phase approach will be followed during the evaluation phase. All proposals received will be evaluated in accordance with the **80/20-point** system as prescribed in the Preferential Procurement Regulation, 2022.

### 10.1 PHASE 1: DISQUALIFICATION ADMINISTRATION REQUIREMENTS

□ Only bidders who submitted quote according to the below will be considered for phase 2:

-  Quotation *validity* period must be 90 days if Not possible indicate the period on the quotation. Quote that depends or affect by Rate of Exchange will be processed using the current Rate of Exchange on the award
-  Quotes must be submitted as per the prescribed closing date.
-  Supplier must be registered on CSD (Central Supplier Database)
-  Bid/quotations submitted after closing date will not be considered.

### 10.2 PHASE 2: FUNCTIONAL/TECHNICAL EVALUATION

Only proposals that have met the criteria for administrative requirements will qualify for this phase. During the second phase, the ability of the bidder to execute the project will be evaluated.

#### Desk-top Evaluation

- Experience and References
- Qualifications
- Methodology of the Project Plan

Each criteria will be allocated points with a total of 100 points. Only proposals that scored at least 65 points or more will proceed to phase 3.

## EVALUATION CRITERIA

Only proposals that met the criteria set for phase 2 will qualify for this phase. During this phase, the proposal will be evaluated according to the evaluation criteria defined below:

## EVALUATION CRITERIA

#	CRITERION	REQUIREMENTS	POINTS ALLOCATED	TOTAL POINTS
	Expertise & capabilities (Par4)	1.1 <b><u>Qualifications of the project leader (Attach Valid Certified copies of certificates &amp; academic record)</u></b>		10
		Honours degree in either Statistics/ Econometrics/Mathematics/Data Science qualification (NQF level 8)	10	
		No qualification information	0	
		1.2 <b>Qualifications of the team members assigned to the project (Attach Valid Certified copies of certificates &amp; academics).</b>		5
		Bachelor's degree in Statistics or Econometrics/Mathematics qualification (NQF level 7).	5	
		No qualification information	0	
		1.3 <b>Project Leader experience in designing, conducting surveys using online systems, &amp; analysing, including facilitating focus groups (must attach CV with a minimum of four (4) years' experience);</b>		30
		6-7 years' experience	30	
		4-5 years' experience	25	
		0-3 years' experience	0	

		<b>1.4 Team member experience as data analyst with minimum of 2 years' experience in data analysis, facilitating focus groups and qualitative report writing skills:</b>		<b>20</b>
		7 and above years' experience	20	
		5-6 years' experience	15	
		2-4 years' experience	10	
		Less than 2 years' experience	0	
		<b>1.5 The company to demonstrate experience in designing online survey, facilitating focus groups, excellent communication skills, analysis and report- writing with a minimum of four (4) years for institutions with over 500 respondents: Attach original of The Presidency returnable project reference form (Annexure A) signed, dated, with contact person and contact number</b>		<b>15</b>
		8 and more years' experience	15	
		6-7 years' experience	10	
		4-5 years' experience	5	
		Less than 4 years' experience	0	
		<b>1.6 Methodology –The Bidder must attach the service provider project plan that outline the proposed approach to completing the project with timeline, tools/software to be used and key team members to be assigned to the project.</b>		<b>20</b>
		Project plan shows proposed approach to completing the project with timeline, tools/software to be used and key team members to be assigned to the project with clear steps demonstrating how the project will be completed within 3 months.	20	

		Project plan shows proposed approach to completing the project with timeline, tools/software to be used and key team members to be assigned to the project.	15	
		General Project plan with no timeline, tools/software to be used and key team members to be assigned to the project.	10	
		No project plan developed	0	
	<b>Total points</b>			<b>100</b>



Proposals that score at least 65 out of 100 points or more will qualify for phase 3.

### 10.3 PHASE 3 – PRICE AND SPECIFIC GOALS

The bid will be awarded to the bidder who scored the highest points in terms of Price and specific goals

DESCRIPTION	POINTS
PRICE	80
SPECIFIC GOALS	20
TOTAL PONTs FOR PRICE AND SPECIFIC GOALS	100

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

*(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)*

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Means of verification
Women ownership		10	CSD report
Youth ownership		7	CSD report
People with Disabilities		3	CSD report

**NB: Formula for calculating number of points: Ownership percentage X number of points allocated /100**

### 11 NON-COMPULSORY BRIEFING SESSION

Non-compulsory briefing session will be conducted through Microsoft Teams as follows, please use the link below to join the session:

Date: 27 June 2025

Time: 09h00 to 10h00

Venue: **Microsoft Teams**

[Join the meeting now](#)

Meeting ID: 374 699 170 027 2

Passcode: zh6J2eF9

## 12 ENQUIRIES

### Technical

- Ms Mumsy Maake [Mumsym@presidency.gov.za](mailto:Mumsym@presidency.gov.za)

### Supply Chain Management

- Mr Patrick Mongwe [Quotesenquiries@presidency.gov.za](mailto:Quotesenquiries@presidency.gov.za)



**THE PRESIDENCY  
REPUBLIC OF SOUTH AFRICA**

**RETURNABLE PROJECT REFERENCE FORM**

Project Description:	<b>APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE SURVEY DEVELOPMENT, ANALYSIS SERVICES AND FOCUS GROUPS ON THE EFFECTIVENESS OF THE APPROVED FLEXIBLE WORKING CONDITIONS GUIDELINES IN THE PRESIDENCY OFFICES (PRETORIA, CAPE TOWN AND DURBAN) FOR A PERIOD OF TWO (2) MONTHS.</b>
Ref No:	<b>SCMP 19/03/01R</b>

Note: This returnable document must be completed by the referee to whom services of similar nature, scope, complexity and value was completed successfully by the bidder.

I ..... (Name, Surname & Designation  
Preferably contract Manager)

From

.....  
(Company Name)

Declare that the company was the recipient (client) of the following professional services (project) successfully executed by

.....(Name of bidder)

Project Description:

.....  
Project Location:

Commencement Date (DD/MM/YYYY) :.....Completion Date(DD/MM/YYYY):.....

Contract Value:

.....  
The number of the respondents to which the service was provided as per paragraph 4.5 above.:

.....  
Signature (Company Head or Delegated officer)

.....  
Name of Signatory

Contact Numbers:.....



**THE PRESIDENCY  
REPUBLIC OF SOUTH AFRICA**

**Pricing schedule**

**REF NO: SCMP 19/03/01R: APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE SURVEY DEVELOPMENT, ANALYSIS SERVICES AND FOCUS GROUPS ON THE EFFECTIVENESS OF THE APPROVED FLEXIBLE WORKING CONDITIONS GUIDELINES IN THE PRESIDENCY OFFICES (PRETORIA, CAPE TOWN AND DURBAN) FOR A PERIOD OF TWO (2) MONTHS.**

<b>Services description</b>	<b>Price( exclusive of VAT)</b>	<b>Price(<i>inclusive of</i> VAT )</b>
<p><b>Phase 1</b> This phase will entail:</p> <ol style="list-style-type: none"><li>1. Employee Health and Wellness Sub-Unit, hereafter referred to as “EHW” and the appointed service provider shall have an inception meeting to discuss the project, provide the service provider with the approved Guidelines and agree on timeframes before starting the project.</li><li>2. EHW; Directorates: Information Communication &amp;</li><li>3. Technology and Internal Communication and the service provider shall have a briefing session to agree on roles and responsibilities and timeframes.</li><li>4. The service provider will develop a comprehensive survey tailored to The Presidency’s needs, and send it to EHW for approval.</li><li>5. The service provider shall conduct pilot testing to ensure the survey’s effectiveness.</li><li>6. EHW to provide the appointed service provider with the list of employees and their office locations who will need face to face assistance to complete the survey.</li></ol>	R	R

<b>Phase 2</b> The service provider will: <ol style="list-style-type: none"> <li>1. With the assistance of EHW convene face-to-face meetings to assist the employees who will need support in completing the survey to do so within seven (7) days, before the start of the online departmental wide survey.</li> <li>2. Collect online survey responses within fourteen (14) days from employees other than those reflected in paragraph one (1) above.</li> <li>3. Conduct focus groups with a minimum of sixty (60) employees within fourteen (14) days at least representing all salary levels and categories (level 2-15).</li> <li>4. Analyse survey and focus groups responses from a sample size of Five Hundred and Six (506) employees.</li> </ol>	R	R
<b>Phase 3</b> The Service Provider will: <ol style="list-style-type: none"> <li>1. Submit the report with findings &amp; recommendations within twenty one (21) days after conclusion of the Survey and focus groups.</li> <li>2. Present the report to The Presidency two (2) different management structure/s, as per invitation.</li> </ol>	R	R
<b>Total price( VAT inclusive)</b>		

**All prices must be VAT inclusive**

COMPANY NAME : .....

SIGNATURE OF BIDDER : .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....  
(Proof of authority must be submitted e.g. company resolution)

DATE : .....