

SECTION 2.3: EVALUATION OF BIDS BASED ON FUNCTIONALITY:

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A. FUNCTIONALITY CRITERIA:

The following criteria will be used to calculate points for the quality of Bidders and Bidders must ensure that they submit all information to be evaluated in terms of functionality on the criteria mentioned in table 1 below:

Table 1: Functionality criteria breakdown

| CRITERIA | | MAXIMUM POINTS |
|--------------|--|----------------|
| 1 | Experience | 50 |
| 2 | References | 30 |
| 3 | Qualifications and level of experience of Project team | 20 |
| TOTAL | | 100 |

Important notes:

- (i) Bidders that score less than 80 out of 100 points for the functionality criteria will be regarded as submitting a non-responsive Bid and will not be evaluated on (price and preference points).*
- (ii) Bidders must ensure that all the information requested is provided in detail. Failure on the bidder part to provide the evidence required to award points will result in no points being awarded for that criteria.*
- (iii) Unclear or incomplete information provided will result in no points being allocated.*
- (iv) Bidders must submit applicable information for this tender. Reference to any attached documentation must be clearly indicated.*
- (v) Points will be allocated in terms of the evidence provided by the bidder. If the information provided during the course of the evaluation of contract are known to be false, the municipality will reserve the right not to award points or cancel the contract.*

CRITERIA 1: BIDDER’S REQUIRED EXPERIENCE = 50 points:

WHAT IS EVALUATED: The Bidder’s experience and sound knowledge of the Municipal environment, legislation, accounting and financial practices and related prescripts, practice notes, policies and work procedures in order to execute a project of this discipline is hereby evaluated.

WHAT MUST BE COMPLETED: A detailed summary list must be provided with the Bid submission, on **Form A: Schedule of Work Carried Out by Tenderer**, which must have sufficient detail to indicate specific projects with corresponding value that were completed by the Bidder during the past 5 years.

EVIDENCE REQUIRED: Completed and signed FORM A must be attached at **Part 11**.

NOTE: Tenderers that do not supply the information in the above prescribed format or omit to provide the required evidence will not be awarded points for this section.

HOW WILL POINTS BE ALLOCATED: Points will be allocated for the Bidder’s project experience as per Table 1 below.

| Table 1: Experience | | |
|---------------------|---------------------|------------------------|
| Description | No of projects | Maximum Points awarded |
| Excellent | 10 or more projects | 50 |
| Good | 3 to 9 projects | 30 |
| Poor | 0 tot 2 projects | 0 |

CRITERIA 2: REFERENCES = Max 30 pts

WHAT IS EVALUATED: The track record of the Bidder in relation to similar projects previously conducted and completed is evaluated here.

WHAT MUST BE COMPLETED: The Bidder must obtain references from 5 different clients in the template provided as Form B: Nominated references from bidder. **(The primary should be projects done for municipalities/local government (minimum three references (projects) of the five references).**

EVIDENCE REQUIRED: Five references from different clients must be attached at Part 11.

NOTE: The bidder must provide at least 5 separate and unrelated references. **The primary should be projects done for municipalities/local government (minimum three references (projects) of the five references).**

HOW WILL POINTS BE ALLOCATED: Points for Track Record will be allocated as indicated in the tables 2, & 2A, 2B, and 2C, below. A maximum of 6 points will be awarded per reference.

| Table 2: Track Record | |
|--|----------------|
| Criteria | Points awarded |
| Completion of project on time and budget | 2 |
| Quality of end product | 2 |
| Professional behaviour always, towards Client and all Role Players | 2 |
| TOTAL | 6 |

Table 2A: Completion of project on time = 4 pts - Was project completed on time?

| Table 2A: TRACK RECORD | |
|---|----------------|
| Completion of project according to initial program and budget submitted by Bidder | Points awarded |
| Yes – on time | 1 |
| Not on time | 0 |
| Yes – in budget | 1 |
| Not in within the budget | 0 |
| TOTAL | .../2 |

Table 2B: Quality of End Product = 3 pts - Was work executed in accordance with the Project Execution Statement and did the final product match the expectations that were created during the Project Initiation Stage?

| Table 2B: TRACK RECORD | |
|-----------------------------|----------------|
| End Product | Points awarded |
| Exceed initial expectations | 2 |
| Met expectations | 1 |
| Did not meet expectations | 0 |
| TOTAL | .../2 |

Table 2C: Professional behaviour = 3 pts – Was the work executed in a professional manner and professional behaviour, at all times towards role players?

| Table 2C: TRACK RECORD | |
|---------------------------------|-----------------------|
| Professional behaviour | Points awarded |
| Behaviour professional | 2 |
| Behaviour unprofessional | 0 |
| TOTAL | ..12 |

- **Bidders that score less than 80 out of 100 points for the functionality criteria will be regarded as submitting a non-responsive Bid and will not be evaluated on price and preference points.**
- **Failure to provide the information and evidence as required and, in the format, as indicated, will result in no points being awarded to tenderer for functionality.**

The following represent examples of the relevant FORMS A - B to be completed by the bidder and attached where indicated.

CRITERIA 3: BIDDER'S REQUIRED QUALIFICATIONS AND LEVEL OF EXPERIENCE OF PROJECT TEAM = 20 points:

WHAT IS EVALUATED: The Bidder's qualifications and level of experience of project team. **That the project team's CV's must be attached.**

EVIDENCE REQUIRED: Bidder must submit proof of the project team's qualifications and experiences.

NOTE: Tenderers that do not supply the information in the above prescribed format or omit to provide the required evidence will not be awarded points for this section.

HOW WILL POINTS BE ALLOCATED: Points will be allocated for the Bidder's project experience as per Table 1 below.

| | CRITERIA | Maximum Score | For proof of compliance/conformance provide bid document reference page number |
|-------------------|---|---------------|--|
| 3 | CV's and level of experience of Project team (20) | | |
| | a) Relevant qualifications and experience of project leader (Director/Partner) | | |
| | i) | | |
| | CIA | 3 | |
| | CA (SA) and (CIA) | 5 | |
| | ii) Experience: | | |
| | 2 years | 3 | |
| | 4 years | 4 | |
| | 6+ years | 5 | |
| | b) Relevant qualifications and experience of the Manager for the projects (6) | | |
| | i) Qualification of Manager: | | |
| | B Com Hons | 3 | |
| CIA | 4 | | |
| CA (SA) and (CIA) | 5 | | |
| ii) Experience | | | |
| 2 years | 2 | | |
| 4 years | 3 | | |
| 6+ years | 5 | | |
| | TOTAL | 20 | |

FORM A: WORK CARRIED OUT BY THE BIDDER

NOTE THAT THE FOLLOWING IS ONLY AN EXAMPLE – REFER TO PART 11. FOR FORM TO BE COMPLETED

PREVIOUS EXPERIENCE

Provide the following information on relevant previous experience (*indicate specifically projects of similar or larger size and/or which is similar with regard to type of work*). In addition to any requirements, bidders must furnish particulars of:

- Only Projects completed during the past 5 years will be considered. **The primary should be projects done for municipalities/local government (minimum three references (projects) of the five references).**
- Bidder must complete and attach a copy of the form below, to claim any points in terms of functionality.
- Tenderers that do not supply the information in the below prescribed format will not be awarded points for this section.
- Bidders that fail to provide the requested evidence will not be awarded points for the criteria.
- Completed Form A to be included in the tender document under Part 11

This information is material to the award of the Contract.

| Project: HES-GEN 01/2425 | | | | | | |
|--------------------------|----------------------------|------------------------------|-------------------|------------------|-------------|-----------------|
| No | Project name & description | Project value (R, Excl. VAT) | Institution Name: | Completion date: | Contact no: | Contact person: |
| 1. | | | | | | |
| 2. | | | | | | |
| 3. | | | | | | |
| 4. | | | | | | |
| 5. | | | | | | |
| 6. | | | | | | |

Name of Tendering Entity: _____

Signature: _____

Date: _____

DECLARATION,

I, THE UNDERSIGNED [NAME] CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT. I ACCEPT THAT THE MUNICIPALITY MAY EXERCISE DUE CONSEQUENCE MANAGEMENT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

AUTHORISED SIGNATURE:

NAME:

CAPACITY:

DATE:

Initials of Service Provider's Authority:

FORM B: NOMINATED REFERENCES FOR BIDDER

NOTE THAT THE FOLLOWING IS ONLY AN EXAMPLE – REFER TO PART 11 FOR FORMS TO BE COMPLETED

The bidder must provide 5 separate and unrelated contactable references. The references MUST relate to projects that are like the project being tendered for. The references MUST complete Form B. Original and completed Form B's, to be included in the tender document under Part 11.

Background information of Nominated Referees

| | |
|-----------------------------------|--|
| Project for this tender: | |
| Referee name: | |
| Postal address | |
| Contact number of referee: | |
| Email address: | |
| Name of Bidder evaluated: | |
| Project Name: | |
| Project Description: | |
| Project Completion date: | |
| Project duration: | |
| Final Project Cost: | |

| Table 2A: TRACK RECORD | |
|--|-----------------------|
| Completion of project according to initial program and budget submitted by Bidder | Points awarded |
| Yes – on time | 1 |
| Not on time | 0 |
| Yes – in budget | 1 |
| Not in within the budget | 0 |
| TOTAL | .../2 |

Table 2B: Quality of End Product = 2 pts - Was work executed in accordance with the Project Execution Statement and did the final product match the expectations that were created during the Project Initiation Stage?

| Table 2B: TRACK RECORD | |
|------------------------------------|-----------------------|
| End Product | Points awarded |
| Exceed initial expectations | 2 |
| Met expectations | 1 |
| Did not meet expectations | 0 |
| TOTAL | .../2 |

Background information of Nominated Referees

| | |
|-----------------------------------|--|
| Project for this tender: | |
| Referee name: | |
| Postal address | |
| Contact number of referee: | |
| Email address: | |
| Name of Bidder evaluated: | |
| Project Name: | |
| Project Description: | |
| Project Completion date: | |
| Project duration: | |
| Final Project Cost: | |

| Table 2A: TRACK RECORD | |
|--|-----------------------|
| Completion of project according to initial program and budget submitted by Bidder | Points awarded |
| Yes – on time | 1 |
| Not on time | 0 |
| Yes – in budget | 1 |
| Not in within the budget | 0 |
| TOTAL | .../2 |

Table 2B: Quality of End Product = 2 pts - Was work executed in accordance with the Project Execution Statement and did the final product match the expectations that were created during the Project Initiation Stage?

| Table 2B: TRACK RECORD | |
|------------------------------------|-----------------------|
| End Product | Points awarded |
| Exceed initial expectations | 2 |
| Met expectations | 1 |
| Did not meet expectations | 0 |
| TOTAL | .../2 |

Table 2C: Professional behaviour = 2 pts - Was the work executed in a professional manner and professional behaviour, at all times towards role players?

| Table 2C: TRACK RECORD | |
|---------------------------------|-----------------------|
| Professional behaviour | Points awarded |
| Behaviour professional | 2 |
| Behaviour unprofessional | 0 |
| TOTAL | .../2 |

Additional Remarks/Comments:

Initials of Service Provider's Authority:

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I, the undersigned, hereby certify that the above information is, to the best of my knowledge, correct and a true reflection.

Signature of Deponent

Date of declaration

DECLARATION,

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AUTHORISED SIGNATURE:

NAME:

CAPACITY:

DATE:

Initials of Service Provider's Authority:

Background information of Nominated Referees

| | |
|-----------------------------------|--|
| Project for this tender: | |
| Referee name: | |
| Postal address | |
| Contact number of referee: | |
| Email address: | |
| Name of Bidder evaluated: | |
| Project Name: | |
| Project Description: | |
| Project Completion date: | |
| Project duration: | |
| Final Project Cost: | |

| Table 2A: TRACK RECORD | |
|--|-----------------------|
| Completion of project according to initial program and budget submitted by Bidder | Points awarded |
| Yes – on time | 1 |
| Not on time | 0 |
| Yes – in budget | 1 |
| Not in within the budget | 0 |
| TOTAL | .../2 |

Table 2B: Quality of End Product = 2 pts - Was work executed in accordance with the Project Execution Statement and did the final product match the expectations that were created during the Project Initiation Stage?

| Table 2B: TRACK RECORD | |
|------------------------------------|-----------------------|
| End Product | Points awarded |
| Exceed initial expectations | 2 |
| Met expectations | 1 |
| Did not meet expectations | 0 |
| TOTAL | .../2 |

Table 2C: Professional behaviour = 2 pts - Was the work executed in a professional manner and professional behaviour, at all times towards role players?

| Table 2C: TRACK RECORD | |
|---------------------------------|-----------------------|
| Professional behaviour | Points awarded |
| Behaviour professional | 2 |
| Behaviour unprofessional | 0 |
| TOTAL | .../2 |

Additional Remarks/Comments:

Initials of Service Provider's Authority:

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AUTHORISED SIGNATURE:

NAME:

CAPACITY:

DATE:

Initials of Service Provider's Authority:

Background information of Nominated Referees

| | |
|-----------------------------------|--|
| Project for this tender: | |
| Referee name: | |
| Postal address | |
| Contact number of referee: | |
| Email address: | |
| Name of Bidder evaluated: | |
| Project Name: | |
| Project Description: | |
| Project Completion date: | |
| Project duration: | |
| Final Project Cost: | |

| Table 2A: TRACK RECORD | |
|--|-----------------------|
| Completion of project according to initial program and budget submitted by Bidder | Points awarded |
| Yes – on time | 1 |
| Not on time | 0 |
| Yes – in budget | 1 |
| Not in within the budget | 0 |
| TOTAL | .../2 |

Table 2B: Quality of End Product = 2 pts - Was work executed in accordance with the Project Execution Statement and did the final product match the expectations that were created during the Project Initiation Stage?

| Table 2B: TRACK RECORD | |
|-------------------------------|-----------------------|
| End Product | Points awarded |
| Exceed initial expectations | 2 |
| Met expectations | 1 |
| Did not meet expectations | 0 |
| TOTAL | .../2 |

Table 2C: Professional behaviour = 2 pts - Was the work executed in a professional manner and professional behaviour, at all times towards role players?

| Table 2C: TRACK RECORD | |
|-------------------------------|-----------------------|
| Professional behaviour | Points awarded |
| Behaviour professional | 2 |
| Behaviour unprofessional | 0 |
| TOTAL | .../2 |

Additional Remarks/Comments:

Initials of Service Provider's Authority:

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CAPACITY:

DATE:

Initials of Service Provider's Authority:

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|----------------------------|--|
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| Referee name: | |
| Postal address | |
| Contact number of referee: | |
| Email address: | |
| Name of Bidder evaluated: | |
| Project Name: | |
| Project Description: | |
| Project Completion date: | |
| Project duration: | |
| Final Project Cost: | |

| Table 2A: TRACK RECORD | |
|---|----------------|
| Completion of project according to initial program and budget submitted by Bidder | Points awarded |
| Yes – on time | 1 |
| Not on time | 0 |
| Yes – in budget | 1 |
| Not in within the budget | 0 |
| TOTAL | .../2 |

Table 2B: Quality of End Product = 2 pts - Was work executed in accordance with the Project Execution Statement and did the final product match the expectations that were created during the Project Initiation Stage?

| Table 2B: TRACK RECORD | |
|-----------------------------|----------------|
| End Product | Points awarded |
| Exceed initial expectations | 2 |
| Met expectations | 1 |
| Did not meet expectations | 0 |
| TOTAL | .../2 |

Table 2C: Professional behaviour = 2 pts - Was the work executed in a professional manner and professional behaviour, at all times towards role players?

| Table 2C: TRACK RECORD | |
|--------------------------|----------------|
| Professional behaviour | Points awarded |
| Behaviour professional | 2 |
| Behaviour unprofessional | 0 |
| TOTAL | .. /2 |

Additional Remarks/Comments:

Initials of Service Provider's Authority:

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