

TERMS OF REFERENCE FOR THE APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER
TO CONDUCT A COMPREHENSIVE FACILITIES MANAGEMENT AND PROPERTY MANAGEMENT
PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION
ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY
FOR PERIOD OF 18 MONTHS



**TERMS OF REFERENCE FOR THE APPOINTMENT OF A PROFESSIONAL
SERVICE PROVIDER TO CONDUCT A COMPREHENSIVE FACILITIES
MANAGEMENT AND PROPERTY MANAGEMENT PERFORMANCE AUDIT,
INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION
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SOCIAL SECURITY AGENCY FOR A PERIOD OF EIGHTEEN (18) MONTHS.**

Table of Contents

1. PURPOSE.....	3
2. BACKGROUND.....	3-4
3. SCOPE OF WORK.....	4-6
4. DELIVERABLES.....	6-9
5. REPORTING.....	9
6. EVALUATION OF THE BID.....	9
7.STAGE 1: PHASE 1 – SPECIAL CONDITION.....	9-10
8.STAGE 1: PHASE 2: ADMINISTRATIVE COMPLIANCE.....	10
9.STAGE 1: PHASE 3: FUNCTIONAL EVALUATION CRITERIA.....	11-15
10.STAGE 2: PRICE AND STATUS LEVEL CONTRIBUTOR.....	16-17
11.BID CONDITIONS.....	17-18
12.ENQUIRIES.....	18

1. PURPOSE

To conduct comprehensive Facilities Management and Property Management Performance Audit, including a physical audit of building conditions and utilization assessment of all offices occupied by South African Social Security Agency (SASSA) in all nine Regions/Provinces including Head Office, in line with the National Building Regulations and Building Standards Act of 1977 (Act 103 of 1977) as amended.

The audit must comply with all the Built Environment Acts as recognised by the Built Environment Council Acts 43 of 2000 as amended, which includes the following but not limited to;

- Architectural Profession Acts 44 of 2000
- Landscape Architectural Profession Acts 45 of 2000
- Engineering Profession Acts 46 of 2000
- Property Valuer Profession Acts 47 of 2000
- Construction Health and Safety Professional Section 18(1)(c) Act 48 of 2000
- Project and Construction Management Professions Act 48 of 2000
- Quantity Surveying Profession Acts 49 of 2000

BACKGROUND

- 2.1 SASSA was established as a specialist institution to take responsibility for the management, administration and disbursement of social grants. During the establishment process, SASSA had no offices/facilities and relied on sharing offices/facilities with the Provincial Departments of Social Development and other organs of the state. SASSA engaged in a process of acquisition of offices in all the regions/provinces so that it can deliver on its mandate efficiently and effectively.
- 2.2 During the acquisition of offices/ facilities the Agency has procured some of its offices/facilities through National Department of Public Works and Infrastructure, while other offices were acquired directly by the Agency. It is also important to note that there are other offices/facilities that are constructed by the Agency.
- 2.3 There are also offices/ facilities that the Agency occupy rent free, where the Agency do not have formal lease agreement and in some instances the Agency have signed memorandum of understanding, and most of those offices are Government owned buildings and tribal authorities.
- 2.4 The offices were acquired to ensure that the Agency has footprint within all nine provinces to support the provision of comprehensive social security services against vulnerability and poverty within the constitutional and legislative framework.

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2.5 Updated SASSA property Register currently is four hundred and eighty-one (481) offices throughout the Nine Regions/ Provinces including Head Office.

3. SCOPE OF WORK

3.1 The scope of work for the audit will include the following but not limited to physical inspections of SASSA Immovable Properties(offices/facilities), physical meetings, reports, engagement with SASSA stakeholders and skills transfer to all identified SASSA officials.

NB: SASSA may decide to increase or decrease the number of offices to be audited for any reason which may be arise or based on the operational changes.

3.1.1 A comprehensive engagement with SASSA Head Office, Regional Offices, District Offices and Local Offices, regarding current and the envisage future activities for the utilisation of SASSA Immovable Properties(offices/facilities) in compliance with the Government Immovable Asset Management Act(GIAMA Act No. 19 of 2007 as amended) and Space Planning Norms and Standards for office accommodation used by organs of state (Government Gazette 2 September 2005 No.27985 as amended)

3.1.2 Conduct an assessment on the building condition as per attached list of SASSA offices as **Annexure A** in line with requirement of the Occupational Health and Safety Act 85 of 1993 as amended. This must include a quantified assessment report for the level of repairs and maintenance required complete with costing. The condition assessment must cover the following items;

- Substructure.
- Superstructure.
- Roof.
- Exterior finishes
- Interior finishes.
- Sanitation Services.
- Electrical services.
- Mechanical Services.
- External services (Sewage lines, Storm water)
- Impact of the buildings on service delivery
- Identification of the maintenance work required to bring the condition of the building and its services up to the specified condition standards.
- Identification of risks and mitigating factors
- Ranking the maintenance work required in order of priority.
- Disability friendliness of the building/environment and with clear recommendations for improved conditions.

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ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY
FOR PERIOD OF 18 MONTHS

3.1.3 Assess the level of compliance with municipal bylaws for SASSA-built offices
as per the attached list of SASSA Office Buildings

3.1.4 Engage SASSA Employee Wellness and Local Office Managers to discuss the
project and understand their perspective on the infrastructure needs of
pregnant women, elderly people and parents with young children for
implementation and integration into a new SASSA Infrastructure Model.

3.1.5 Conduct an audit of office space/accommodation in line with the Government
Immovable Asset Management Act (GIAMA Act No. 19 of 2007 as amended) and
Space Planning Norms and Standards for office accommodation used by organs of
state (Government Gazette, 2 September 2005 No. 27985 as amended) to determine
the impact of SASSA approved Working Remotely Policy on the current office space
utilisation.

3.1.6 Verify the correctness, update and improve information in the SASSA Immovable
Property Portfolio Register, focusing on the following:

- The area where the building has been constructed.
- The name of the town where the building is constructed.
- Coordinates of the building location
- The size of the building in square metres.
- Building lease status and the rental costs per month.
- Lease duration.
- The type of the building.
- The building owner.
- Purpose of the building.
- Municipal charges
- Tenant installation projects
- Update and improve the SASSA Property Portfolio Register.

3.1.7 Analyse and review accommodation needs and budget, by compiling User Asset
Management Plan and Infrastructure Plan in accordance with the Government
Immovable Asset Management Act (GIAMA Act No. 19 of 2007 as amended) for
2027 to 2030 budget and planning cycle, which will then form part of the planning
document for SASSA Infrastructure Immovable Strategy and Planning in line with the
Public Finance Management Act.

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PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION
ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY
FOR PERIOD OF 18 MONTHS

- 3.1.8 Based on the analysis and review of the accommodation needs, recommend a new Agency Infrastructure model for SASSA Offices to accommodate the ICT systems as per the latest grant process to support the SASSA Service Delivery Model objective.
- 3.1.9 Conduct Gap analysis in terms of skills in Facilities Management against SASSA Immovable Property Portfolio, maintenance needs and budget.
- 3.1.10 The successful service provider must provide on job skills transfer to relevant SASSA Head Office and Regional Office personnel covering the following topics:
- Auditing of office space utilisation for space optimisation.
 - Auditing of building maintenance requirements(budgeting).
 - Assessment of offices regarding disability friendliness.
 - Updating of lease register.
 - Compiling User Asset Management Plans (UAMP).
 - General Occupational Health and Safety Compliance audit.

4. DELIVERABLES

- 4.1 A comprehensive SASSA immovable Properties status audit report of all offices/accommodation occupied and recommendations outlining the findings of the audit as per scope of work. The report should include the following: -
- 4.1.1 A detailed report on the comprehensive engagement with SASSA Head Office, Regional Offices, District Offices and Local Offices, regarding current and the envisage future activities for the utilisation of SASSA Immovable Properties(offices/facilities) in compliance with the Government Immovable Asset Management Act(GIAMA Act No. 19 of 2007 as amended),Space Planning Norms and Standards for office accommodation used by organs of state (Government Gazette 2 September 2005 No.27985 as amended) and South African Social Security Agency Act, 2004 as amended.
- 4.1.2 A comprehensive assessment report on the building condition in line with requirement of the Occupational Health and Safety Act 85 of 1993 as amended. This report must include a quantified assessment for the level of repairs and maintenance required, costing and action plan. The condition assessment report must cover the following items;
- Substructure.
 - Superstructure.
 - Roof.
 - Exterior finishes

TERMS OF REFERENCE FOR THE APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER
TO CONDUCT A COMPREHENSIVE FACILITIES MANAGEMENT AND PROPERTY MANAGEMENT
PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION
ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY
FOR PERIOD OF 18 MONTHS

- Interior finishes.
- Sanitation Services.
- Electrical services.
- Mechanical Services.
- External services (Sewage lines, Storm water)
- Impact of the buildings on service delivery
- Identification of the maintenance work required to bring the condition of the building and its services up to the specified condition standards.
- Identification of risks and mitigating factors
- Ranking the maintenance work required in order of priority.
- Disability friendliness of the building/environment and with clear recommendations for improved conditions.

4.1.3 Assessment report for the level of compliance with municipal bylaws for SASSA-built offices as per the attached list of SASSA Office Buildings.

4.1.4 Produce a report for assessment on SASSA buildings regarding the dedicated space for pregnant women, baby changing rooms and baby restrooms.

4.1.5 Generate a report complete with recommendations on the outcome of engagement with SASSA Employee Wellness Unit and Local Office Managers with regards to their perspective on the infrastructure needs of pregnant women, elderly people and parents with young children for implementation and integration into a new SASSA Infrastructure Model.

4.1.6 A comprehensive audit report for office space/accommodation in line with the Government Immovable Asset Management Act (GIAMA Act No. 19 of 2007 as amended) and Space Planning Norms and Standards for office accommodation used by organs of state (Government Gazette, 2 September 2005 No. 27985 as amended) to determine the impact of SASSA approved Working Remotely Policy on the current office space utilisation and further indicate if there is a need to reconfigure, dispose/relinquish any surplus or redundant office space.

4.1.7 Develop and provide a master plan with cost estimate for implementing the corrective measures for repairs and maintenance to ensure compliance to the requirements of Occupational Health and Safety Act for only state-owned buildings and SASSA built properties.

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TO CONDUCT A COMPREHENSIVE FACILITIES MANAGEMENT AND PROPERTY MANAGEMENT
PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION
ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY
FOR PERIOD OF 18 MONTHS

- 4.1.8 Develop, provide a detailed report and recommendations regarding the audit of office space/accommodation on the utilisation level and including the impact assessment of the SASSA approved Working Remotely Policy against utilization of office accommodation.
- 4.1.9 Verification report regarding the correctness, updated and improved information in the SASSA Immovable Property Portfolio Register, focusing on the following:
- The area where the building has been constructed.
 - The name of the town where the building is constructed.
 - Coordinates of the building location.
 - The size of the building in square metres.
 - Building lease status and the rental costs per month.
 - Lease duration.
 - The type of the building.
 - The building owner.
 - Purpose of the building.
 - Municipal charges
 - Tenant installation projects.
- 4.1.10 User Asset Management Plan and Infrastructure Plan in accordance with the Government Immovable Asset Management Act (GIAMA Act No. 19 of 2007 as amended) for 2027 to 2030 budget and planning cycle, which will then form part of the planning document for SASSA Infrastructure Immovable Strategy and Planning in line with the Public Finance Management Act.
- 4.1.11 A new proposed Infrastructure model for SASSA Offices to accommodate the ICT systems as per the latest grant process to support the SASSA Service Delivery Model objective.
- 4.1.12 Gap analysis report complete with recommendations in terms of skills in Facilities Management against SASSA Immovable Property Portfolio, maintenance needs and budget.
- 4.1.13 Train relevant SASSA Head Office and Regional Office personnel covering the following topics:
- Auditing of office space utilisation for space optimisation.
 - Auditing of buildings maintenance requirements(budgeting).
 - Assessment of offices regarding disability friendliness.
 - Updating of lease register.
 - Compiling User Asset Management Plans (UAMP).
 - General Occupational Health and Safety Compliance audit.

TERMS OF REFERENCE FOR THE APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER
TO CONDUCT A COMPREHENSIVE FACILITIES MANAGEMENT AND PROPERTY MANAGEMENT
PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION
ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY
FOR PERIOD OF 18 MONTHS

4.1.14 Comprehensive monthly reports and Comprehensive Quarterly Progress Reports in line with the set targets.

4.1.15 Comprehensive Consolidated Final report must be presented to Facilities Management and Auxiliary Support Services (FMAS), National Employment Equity Consultative Forum (NEECF), SASSA Executive Committee (EXCO), and submitted 30 days before the end of contract period.

5 REPORTING

5.1 The service provider will be expected to provide monthly progress reports before the 10th of the following month to SASSA Project Manager. The service provider will be expected to attend meetings organised by SASSA Project Manager.

5.2 The service provider will be expected to present the comprehensive consolidated final report to SASSA different forums before the final payment.

6 EVALUATION OF THE BID

The bid proposals shall be evaluated in accordance with the 80/20

Principle. The evaluation shall be conducted in two stages:

7 STAGE 1: PHASE 1 – SPECIAL CONDITION

NB: Requirements of a service provider for audit of buildings

7.1 The service provider must provide the **project leader** who meets the following requirements:

7.1.1 Registered as a Professional Engineer (PrEng) or Professional Quantity Surveyor (PrQS) or Professional Architect (Pr Arch) or Professional Senior Architectural Technologist (PrSArchT), with

- ✓ The letter of good standing or valid registration certificates with a recognised professional body, Engineering Council of South Africa (ECSA) for Professional Engineer (PrEng) or South African Council for the Quantity Surveying Profession (SACQSP) for Professional Quantity Surveyor (PrQS) or South African Council for the Architectural Profession for Professional

TERMS OF REFERENCE FOR THE APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO CONDUCT A COMPREHENSIVE FACILITIES MANAGEMENT AND PROPERTY MANAGEMENT PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY FOR PERIOD OF 18 MONTHS

Architect (Pr Arch) and for Professional Senior Architectural Technologist (PrSArchT).

- 7.1.2 Provide reference letter with contactable number to prove six (6) years post registration experience as well as building condition assessment experience and must demonstrate previous experience and successful execution in the tasks required.

NB: SASSA will verify information provided by the bidders and failure to comply with all the above requirements will invalidate your proposal

7.2 PREPARATION OF THE RESPONSES

- 7.2.1 It is imperative that the responses be prepared in line with instructions as set out in this bid document. Failure to do so will make the responses difficult or impractical to evaluate and thus be disqualified.

- 7.2.2 The bidders are required to submit their proposals using the two-envelope system. Each envelope must be marked correctly and sealed separately for ease of reference during the evaluation process, separate functionality and administrative documents from the price as follows:

Envelope 1 – Technical Proposal;

Envelope 2 – Pricing Proposal

- 7.2.3 The bid proposal must be submitted in two copies. An original response should be accompanied by a hard copy to be submitted in the tender box (address stated in the bid advert) and an electronic copy of the bid proposals must be submitted through the e-Tender Portal. All the contents of the copies should be in the exact same order as in the hard copy to make it easier to navigate and evaluate the bid response.

8 STAGE 1: PHASE 2: ADMINISTRATIVE COMPLIANCE

Administrative Compliance: The bid will be subjected to administrative compliance elements in line with the table below:

EVALUATION CRITERIA
Administrative Compliance
Bidders must submit the following: <ul style="list-style-type: none">• Tax Compliance Status PIN• Proof of registration with Central Supplier Database.• Fully completed and signed SBD forms (As per the bid advertisement)

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PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION
ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY
FOR PERIOD OF 18 MONTHS

**NB: Failure to comply with any of the administrative compliance may result in
a bid being disqualified.**

TERMS OF REFERENCE FOR THE APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO CONDUCT A COMPREHENSIVE FACILITIES MANAGEMENT AND PROPERTY MANAGEMENT PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS AND UTILIZATION ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL SECURITY AGENCY FOR PERIOD OF 18 MONTHS

9 STAGE 1: PHASE 3: FUNCTIONAL EVALUATION CRITERIA

It is Important to note that proposals scoring 70 points for functionality will be evaluated further on, price and specific goals.

NB: The evaluation of the proposals should be carried out in two stages (two envelope system): Separate functionality and administrative documents from the price.

Evaluation criteria for functionality are listed below:

Values: 1=Poor, 2=Average, 3= Good, 4 = Very Good, 5 = Excellent

Phase Four – Functionality Criteria	WEIGHTING 100
<p>1. The service provider must have experience in building—condition assessment Projects As per ANNEXURE B:</p> <p>projects as:</p> <p>1.1 Number of building condition assessment projects completed successfully:</p> <p>(i) 0 and no proof of projects completed successfully =1</p> <p>(ii) 1 project completed successfully = 2</p> <p>(iii) 2 projects completed successfully = 3</p> <p>(iv) 3 projects completed successfully = 4</p> <p>(v) 4 projects and above completed successfully = 5</p>	10

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MANAGEMENT PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS
AND UTILIZATION ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL
SECURITY AGENCY FOR PERIOD OF 18 MONTHS

Phase Four – Functionality Criteria	WEIGHTING 100
Proof of project completed as per ANNEXURE B must be as per award letter, completion certificate, including contract period (start date and end date) where building condition assessment projects was done.	
<p>2. Track record of the Service Provider as per ANNEXURE B.</p> <p>This criterion assesses the bidders' capability to render services in terms of value of completed projects:</p> <ul style="list-style-type: none"> (i) Less than a million, and no proof of track record = 1 (ii) One (1) million rands up to four (4) million rands = 2 (iii) Above four (4) Million rands to 8 million rands = 3 (iv) Above eight (8) Million rands to ten (10) million rands = 3 (v) Above ten (10) million rands = 5 <p>Supporting document must be in a form of a purchase order or letter of award with the value of the project</p> <p>SASSA will verify the authenticity of document provided and any misrepresentation will disadvantage the bidders in terms of scoring.</p>	30
<ul style="list-style-type: none"> • Audit Methodology, Detailed Project Implementation Plan 	60



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AND UTILIZATION ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL
SECURITY AGENCY FOR PERIOD OF 18 MONTHS

Phase Four – Functionality Criteria	WEIGHTING 100
<p>for the project life cycle in line with the scope of work and deliverables, resource allocation and management, skills transfer plan.</p> <ul style="list-style-type: none"> i. Significantly lacks key components. 1= Poor: <p>Audit Methodology: Missing or incomplete. Implementation Plan: Vague, doesn't cover the project life cycle, or lacks alignment with scope and deliverables. Resource Plan: Inadequate or non-existent. Skills Transfer: Not addressed.</p> <ul style="list-style-type: none"> ii. Contains most components but lacks detail or clarity. 2= Average: <p>Audit Methodology: Basic but functional. Implementation Plan: Includes all phases of the life cycle but is not detailed enough. Resource Plan: Identified, but without sufficient detail on allocation or management. Skills Transfer: Mentioned, but with a weak or generic plan.</p>	



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AND UTILIZATION ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL
SECURITY AGENCY FOR PERIOD OF 18 MONTHS

Phase Four – Functionality Criteria	WEIGHTING 100
<p>Audit Methodology: Well-defined and comprehensive. Implementation Plan: Detailed, covers all phases of the project life cycle, and aligns well with scope and deliverables. Resource Plan: Detailed and logical, with clear allocation and management strategies. Skills Transfer: Clearly outlined with a realistic plan for knowledge and skill transfer.</p> <ul style="list-style-type: none"> • iii. Solid plan with clear details and good alignment. 3= Good: <p>Audit Methodology: Well-defined and comprehensive. Implementation Plan: Detailed, covers all phases of the project life cycle, and aligns well with scope and deliverables. Resource Plan: Detailed and logical, with clear allocation and management strategies. Skills Transfer: Clearly outlined with a realistic plan for knowledge and skill transfer.</p> <ul style="list-style-type: none"> • iv. Excellent plan with a high degree of clarity, detail, and foresight. 4= Very Good: Audit Methodology: Thorough, robust, and incorporates industry best practices. 	



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AND UTILIZATION ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL
SECURITY AGENCY FOR PERIOD OF 18 MONTHS

Phase Four – Functionality Criteria	WEIGHTING 100
<p>Implementation Plan: Highly detailed, with clear milestones and a strong link to deliverables and the project life cycle.</p> <p>Resource Plan: Detailed, proactive, and includes contingency planning.</p> <p>Skills Transfer: Proactive and robust, with a clear strategy for ongoing knowledge sharing beyond the project closure.</p> <ul style="list-style-type: none"> • v. An exceptional, best-in-class plan that is comprehensive, innovative, and flawlessly executed. 5= Excellent: <p>Audit Methodology: Comprehensive, innovative, and forward-thinking, addressing potential risks and opportunities.</p> <p>Implementation Plan: Flawless execution of the plan, with exceptional alignment with all aspects of the scope and deliverables.</p> <p>Resource Plan: Optimized, with strategic resource allocation and proactive risk management.</p> <p>Skills Transfer: A robust, strategic, and sustainable plan that ensures long-term knowledge retention and team development.</p>	



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MANAGEMENT PERFORMANCE AUDIT INCLUDING AN AUDIT OF BUILDING CONDITIONS
AND UTILIZATION ASSESSMENT OF OFFICES OCCUPIED BY THE SOUTH AFRICAN SOCIAL
SECURITY AGENCY FOR PERIOD OF 18 MONTHS

10 STAGE 2: PRICE AND STATUS LEVEL CONTRIBUTOR

- 10.1 The bid price charged must be inclusive of professional fees, supporting staff fees, transport and accommodation and all fees associated to the execution of the project inclusive of VAT, must be as per the pricing schedule attached. The pricing must be included in the pricing schedule **ANNEXURE C**
- 10.2 Claim for payments (interim payments) will be done after the twenty five percent of work is completed and signed off by the project manager.
- 10.3 This bid will be evaluated on Price and BBBEE Status Level Contributor
Points awarded for BBBEE Status Level of Contribution:

Price and Preference evaluation criteria	100
Price	80
BBBEE Status Level of Contribution	20

- 10.4 In terms of Regulation 5 (2) and 6 (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 (80/20 system)
1	20
2	18
3	14
4	12
5	8



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6	6
7	4
8	2
Non-compliant contributor	0

- 10.4 Bidders must submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS).
- 10.5 Bidders who qualifies as EMEs or QSE can submit a sworn affidavit signed by the EME or QSE representative and attested by commissioner of oaths or BBEE Certificate issued by CIPC.
- 10.6 A consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate for every separate tender.
- 10.7 Public entities and tertiary institutions must also submit B-BBEE Status Level Verification Certificates together with their tenders.
- 10.8 Failure to submit will be interpreted to mean that preference points for BBEE Status Level of contributor are not claimed.

11 BID CONDITIONS

The following are bid conditions which all bidders should take note of:

- 11.1 The Agency will contract and conclude Service Level Agreement(s) with the successful bidder(s).
- 11.2. Non-compulsory virtual briefing session will be conducted as part of this bid.
- 11.3. The Agency reserves the right to cancel or not to award the bid.
- 11.4 The Agency will not be responsible for any cost associated with the compilation of the response documents. All information, documents and specifications must be regarded as confidential and may not be made



*paying the right social grant, to the right person,
at the right time and place. NJALO!*

South African Social Security Agency

Head Office

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available to any unauthorised person or institution without the written consent of the Agency. Where possible, the Agency will furnish the successful bidder with available information that might be necessary for execution of the contract.

- 11.5. The Agency will endeavour to pay the Service Provider within 30 days from submission of the valid invoice following the submission of the completed audit report and upon confirmation of satisfactory quality completion of all requirements for the report.
- 11.6. Bids submitted must be in line with all requirements and specifications as outlined in this document. Failure to comply with the requirements will result in the disqualification of the bids.
- 11.7. Bidders are requested to bid for the complete tender and not a part thereof as incomplete bids will be disqualified.
- 11.8. Bids containing misrepresentation of any facts will, upon discovery, be immediately disqualified. SASSA reserves the right to cancel the contract of the winning bidder/s if this misrepresentation is discovered after the awarding of the contract.
- 11.9. All tender prices must be in South African Rands and fully inclusive of all costs and Value Added Tax. No additional costs other than the agreed amounts will be paid by the Agency. Failure to provide a fully inclusive price will disqualify the bid.
- 11.10. A contractual agreement will be entered into with a single legal entity.
- 11.11. The Agency reserves the right to terminate this contract at any stage.
- 11.12 The Agency reserves the right to negotiate price with the successful bidder.
- 11.13 The audit report will cover all offices throughout the country (South Africa).
- 11.14 The Agency reserves the right to terminate this contract at any stage.

12. ENQUIRIES

All enquiries regarding this bid must be addressed to the following email: -

Condition@sassa.gov.za



*paying the right social grant, to the right person,
at the right time and place. NJALO!*