

SECTION 2.2: 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	50
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 (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	5 or more projects	50
Good	1 to 4 projects	30
Poor	No project	0

CRITERIA 2: REFERENCES = Max 50 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.

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.

HOW WILL POINTS BE ALLOCATED: Points for Track Record will be allocated as indicated in the tables 2, & 2A, 2B, 2C and 2D, below. A maximum of 10 points will be awarded per reference.

Table 2: Track Record	
Criteria	Points awarded
Completion of project on time and budget	3
Audit Opinion Outcomes	3
Quality of end product	2
Professional behaviour always, towards Client and all Role Players	2
TOTAL	10

Table 2A: Completion of project on time = 3 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	2

Not in within the budget	0
TOTAL	.../3

Table 2B: Audit Opinion Outcomes = 3 pts – Were the benefits as offered achieved?

Table 2B: TRACK RECORD	
Benefits realised from services	Points awarded
Clean Audit Opinion	3
Unqualified Audit Opinion	1
Other Opinion	0
TOTAL	.../3

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

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

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

- 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 (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.

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.
- 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-FIN 03/2425						
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	2
Not in within the budget	0
TOTAL	.../3

Table 2B: Audit opinion outcomes = 3 pts – Were the benefits as offered achieved?

Table 2B: TRACK RECORD	
Benefits realised from services	Points awarded
Clean Audit Opinion	3
Unqualified Audit Opinion	1
Other Opinion	0
TOTAL	.../3

Table 2C: 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?

Initials of Service Provider's Authority:

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

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

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

Additional Remarks/Comments:

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**

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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	2
Not in within the budget	0
TOTAL	.../3

Table 2B: Audit opinion outcomes = 3 pts – Were the benefits as offered achieved?

Table 2B: TRACK RECORD	
Benefits realised from services	Points awarded
Clean Audit Opinion	3
Unqualified Audit Opinion	1
Other Opinion	0
TOTAL	.../3

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

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

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

Additional Remarks/Comments:

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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	2
Not in within the budget	0
TOTAL	.../3

Table 2B: Audit opinion outcomes = 3 pts – Were the benefits as offered achieved?

Table 2B: TRACK RECORD	
Benefits realised from services	Points awarded
Clean Audit Opinion	3
Unqualified Audit Opinion	1
Other Opinion	0
TOTAL	.../3

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

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

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

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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	2
Not in within the budget	0
TOTAL	.../3

Table 2B: Audit opinion outcomes = 3 pts – Were the benefits as offered achieved?

Table 2B: TRACK RECORD	
Benefits realised from services	Points awarded
Clean Audit Opinion	3
Unqualified Audit Opinion	1
Other Opinion	0
TOTAL	.../3

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

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

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

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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	2
Not in within the budget	0
TOTAL	.../3

Table 2B: Audit opinion outcomes = 3 pts – Were the benefits as offered achieved?

Table 2B: TRACK RECORD	
Benefits realised from services	Points awarded
Clean Audit Opinion	3
Unqualified Audit Opinion	1
Other Opinion	0
TOTAL	.../3

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

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

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

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