

## HESSEQUA MUNICIPALITY

### HES-CORP 12/2223

## ISSUING OF ENERGY PERFORMANCE CERTIFICATES (EPS'S) FOR MUNICIPAL BUILDINGS

### PART C3.3: FUNCTIONALITY EVALUATION CRITERION

#### 3.3.1 EVALUATION CRITERIA

The Service Provider should take note that the proposal will be evaluated using Price, B-BBEE and Locality using an 80/10/10 point system as outlined in the Preferential Procurement Regulations, 2022 (PPR 2022).

The proposal will be evaluated in three phases:

- Minimum criteria, the service provider must be a SANAS-accredited EPC Inspection Body **(Phase 1)**
- Bidders will be evaluated based on functionality. The minimum threshold for functionality is 60 out of 100 points **(Phase 2)**.
- Bidders who fail to meet the minimum threshold will be disqualified and will not be evaluated on price, B-BBEE and Locality **(Phase 3)**.

#### Certified as Accredited Body

The service provider must be an Accredited Inspection Body for Energy Performance Certificates for Buildings as accredited by the South African National Accreditation System (SANAS) or by a member of the recognition arrangements of the International Laboratory Accreditation Cooperation or the International Accreditation Forum, as is required by the Regulations for The Mandatory Display And Submission of Energy Performance Certificates for Buildings and in accordance with *SANS 1544: 2014 Energy Certificates for Buildings*. The Accreditation Certificate to be provided with tender at time of closing. Schedule 1C must be completed in order to be considered.

#### Minimum score for functionality

Only those tenders submitted by service providers who achieve the minimum score for functionality as stated below will be declared responsive.

The description of the functionality criteria and the maximum possible score for each is shown in the table below. The score achieved for functionality will be the sum of the scores achieved, in the evaluation process, for the individual criteria.

Evaluation criteria	Applicable values/points	Weighting
Work/programme schedule	20	20
Project methodology	20	20
Experience of professionals	30	30
Experience of company	10	10
Past projects of company	20	20
TOTAL		100

The minimum qualifying score for functionality is **60** out of a maximum of **100**.

Where the entity tendering is a Joint Venture the tender must be accompanied by a statement describing exactly what aspects of the work will be undertaken by each party to the joint venture.

Service providers shall ensure that all relevant information has been submitted with the tender offer in the prescribed format to ensure optimal scoring of functionality points for each Evaluation Criteria. Failure to provide all information **IN THIS TENDER SUBMISSION** could result in the service provider not being able to achieve the specified minimum scoring.

A more detailed explanation of the functionality criteria is given below:

Description of Evaluation Criteria	Score breakdown	Total score
<p><b>Work Programme/Schedule</b> A written report must be provided wherein bidders should propose the main activities for the implementation of this project indicating: Clear timelines (start-end dates), critical path activities demonstrating that the project can be completed within the stated period.</p>	<p><b>Poor:</b> The activity schedule omits important task or the timing of the activities and the correlation among them are inconsistent with the methodology statement. There is lack of clarity..... 5 points  <b>Satisfactory:</b> All key activities are included in the activity schedule but are not detailed. There are minor inconsistencies between timing, project deliverables and proposed methodology.....10 points  <b>Good:</b> The work program fits the methodology well; all important activities are indicated in the activity schedule and their timing and sequence is appropriate and consistent with project objectives. There is fair amount of detail including information on resources utilised..... 15 points  <b>Very Good:</b> Besides meeting the "good" rating, decision points and the sequencing and timing of activities are very well defined indicating the bidder has optimized the use of resources..... 20 points</p>	20
<p><b>Project methodology</b> A written report must be provided wherein bidders are to indicate the approach (methodology and technical approach) detailing the execution of the project which is consistent with the work programme/schedule. The methodology is to make reference to the scope of works. This must also include contingency planning and management. The key risk factors affecting the project should be described with possible mitigation action.</p>	<p><b>Poor:</b> The technical approach and / or methodology is poor / is unlikely to satisfy project objectives or requirements. The bidder has misunderstood certain aspects of the scope of work and does not deal with the critical aspects of the project. No risk factors have been listed..... 5 points  <b>Satisfactory:</b> The approach is generic and not tailored to address the specific project objectives and requirements. The approach does not adequately deal with the critical characteristics of the project. The risk factors have been listed, however they are generic and are not detailed..... 10 points  <b>Good:</b> The approach is specifically tailored to address the specific project objectives, scope and requirements and is sufficiently flexible to accommodate changes that may occur during execution. The risk factors have been listed which are specific to the project and have sufficient detail..... 15 points  <b>Very Good:</b> Besides meeting the "good" rating, the important issues are approached in an innovative and efficient way, indicating that the bidder has outstanding knowledge of state-of-the-art approaches. The approach paper details ways to</p>	20

	<p>improve the project outcomes and the quality of the outputs. The methodology incorporates program/scheduling and provides detailed information. Beside meeting the "good" rating, the bidders has provided detail information on mitigation measures and shows good understanding of the required project risk management..... 20 points</p>	
<p><b>Experience of professionals:</b> A CV for each key project team member is to be provided that indicates the number of years of experience with regard to Energy Performance Certificates, Building Energy Audits, and/or energy management and verification services or related fields held by each of the key project team members. <b>SCHEDULE 1A TO BE COMPLETED</b></p>	<p>Technical Manager:</p> <ul style="list-style-type: none"> <li>• 10 or more years ..... 12 points</li> <li>• 6 – 9 years..... 9 points</li> <li>• 3 - 5 years..... 6 points</li> <li>• 1 - 3 years..... 3 points</li> <li>• Less than 1 year..... 0 points</li> </ul> <p>Quality Manager:</p> <ul style="list-style-type: none"> <li>• 10 or more years ..... 9 points</li> <li>• More than 5 – 9 years..... 7 points</li> <li>• More than 3 - 5 years..... 5 points</li> <li>• 1 - 3 years..... 3 points</li> <li>• Less than 1 year.....0 points</li> </ul> <p>Inspector/Energy Performance Assessor:</p> <ul style="list-style-type: none"> <li>• 10 or more years ..... 9 points</li> <li>• More than 5 – 9 years.....7 points</li> <li>• More than 3 - 5 years..... 5 points</li> <li>• 1 - 3 years..... 3 points</li> <li>• Less than 1 year..... 0 points</li> </ul>	30
<p><b>Experience of company:</b> The number of years that the company has been in operation.</p>	<ul style="list-style-type: none"> <li>• 8 or more years .....10 points</li> <li>• More than 5 – 7 years..... 7 points</li> <li>• More than 3 - 5 years ..... 5 points</li> <li>• 1 - 3 years ..... 3 points</li> <li>• Less than 1 year ..... 0 points</li> </ul>	10

<b>Past projects of the company:</b> A table to be provided that indicates the number, description, value and client of projects of a similar scope completed by the company within the last 15 years, such as Building Energy Performance Certificates, Building Energy Audits and/or Building Energy Management & Verification Services. <b>SCHEDULE 1B TO BE COMPLETED</b>	<ul style="list-style-type: none"> <li>• 5 or more Building Energy Performance Certificates ..... 20 points</li> <li>• 1 - 4 Building Energy Performance Certificates .....15 points</li> <li>• 5 or more Building Energy Audits and/or Building Energy Management &amp; Verification Services Projects.....10 points</li> <li>• 1 - 4 Building Energy Audits and/or Building Energy Management &amp; Verification Services Projects..... 5 points</li> <li>• No Building Energy Audits, Building Energy Management &amp; Verification Services, and no Energy Performance Certificates..... 0 points</li> </ul>	20
Total		100

Table 1: Functionality Criteria – Detailed Explanation

**Failure to provide the information as stated above, will result in no points being awarded to tenderer.**

DECLARATION,

I, THE UNDERSIGNED (NAME).....  
CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT. I ACCEPT THAT THE MUNICIPALITY MAY ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

AUTHORISED SIGNATURE: .....

NAME: .....

CAPACITY: ..... DATE: .....