



## REQUEST FOR PROPOSAL (RFP)

RFP NUMBER: RFQ/HUM/24/25/104			
<b>CLOSING DATE</b>	<b>21 August 2024</b>	<b>CLOSING TIME</b>	<b>12:00</b>

SUPPLY CHAIN CONTACTS AND ENQUIRIES	
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Reviewed: Senior Manager: Supply Chain and Contract Management		Controlled: Chief Executive Officer	

15 August 2024

changes.

\*The document shall be revised at least 12 months before next revision date or as per merSETA organisational and operational

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## 1. Introduction to Request for Proposal (RFP)

1.1. The Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA) is a Schedule 3A public entity established in terms of the Skills Development Act (Act No. 97 of 1998), Registration Number 17/merSETA/01/04/20, to facilitate skills development for the Metal and Engineering, Motor Retail and Components Manufacturing, Automobile Manufacturing, Plastics Manufacturing and New Tyre Manufacturing Sectors Automotive Components Manufacturing Chamber.

The merSETA is inviting potential service providers to submit the proposal for the services described under scope of work.

1.2. The merSETA invites suitably qualified and experienced service provider to render Human Resources (HR) consulting services for the MERSETA for a period of two (2) years on an as and when basis.

1.3. This RFP is subject to the Preferential Procurement Policy Framework Act (Act No. 5 of 2000) and the Preferential Procurement Regulations (2022 Regulations), the General Conditions of Contract (GCC), and, if applicable, any other special conditions of contract. Where, however, the special conditions of the contract conflict with the general conditions of the contract, the special conditions of the contract prevail.

## 2. Background Information

- merSETA **Vision**: “Leaders in closing the skills gap”
- merSETA **Mission**: “To increase access to high quality and relevant skills development and training opportunities in order to reduce inequalities and unemployment and to promote employability and participation in the economy.”
- merSETA **Values**:

**We Care - It's about caring for people we render services to**

**We Belong - It's about working together with colleagues**

**We Serve - It's about going beyond the call of duty**

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### 3. OBJECTIVES OF THE SERVICE REQUIRED

The merSETA invites proposals from experienced service providers to respond to this RFP for the provision of comprehensive HR services. The key activities include: -

#### 3.1. Remuneration & Benefits

##### 3.1.1. Salary Benchmarking Exercises

- a. Conduct thorough salary benchmarking with organizations similar to merSETA (other SETA's), other Section 3A entities of similar mandate, comparator companies in the merSECTOR (Metals, Manufacturing, Engineering, Plastics, Tyres, Automotive).
- b. Perform ad-hoc benchmarking for specific positions in the external market.
- c. Review and recommend salary levels, allowances, and key benefits, ensuring market competitiveness.

##### 3.1.2. Remuneration and Benefits Reviews

- a. Evaluate current remuneration structures, considering housing, medical aid, and pension contributions.
- b. Provide detailed cost analysis and justification for any re-evaluations.
- c. Support HR in implementing benchmarking results and updating policies.

##### 3.1.3. Development of Frameworks and Budgets

- a. Create a comprehensive remuneration framework aligned with best practices and legislation.
- b. Develop annual salary and benefits budgets for approval.
- c. Recommend a reward index for equitable allowances and incentives.

##### 3.1.4. Stakeholder Engagement and Training

- a. Engage with management, HR, and unions to finalize the benchmarking report.
- b. Present findings and proposed approaches to stakeholders.
- c. Conduct training workshops for HR staff on remuneration practices.

#### 3.2. Conduct Job Evaluation Services

##### 3.2.1. Patterson Methodology

- a. Present the proposed Patterson methodology for approval.

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- b. Conduct job evaluations based on provided job profiles and advise on appropriate grades and levels.

### **3.2.2. Reporting and Recommendations**

- a. Deliver a detailed report on the methodology, recommended grades, and motivations.
- b. Consider the organizational structure and current job framework in evaluations.

### **3.3.3. Stakeholder Engagement and Training**

- a. Engage with management, HR, and unions to finalize the job evaluation report.
- b. Provide and present training on job evaluation processes (12 people).

## **4. SCOPE OF WORK**

### **4.1. Development of Frameworks and Budgets**

#### **4.1.1. Salary Benchmarking Exercises**

- a) Conduct comprehensive salary benchmarking with similar organizations.
- b) Perform ad-hoc benchmarking for specific roles.
- c) Review current remuneration and propose market-aligned salaries and benefits.
- d) Conduct a holistic evaluation of current salaries, considering allowances and contributions.
- e) Advise on implementation and policy updates based on findings.
- f) Develop a benefits structure and reward index.
- g) Engage stakeholders for input and final submissions.
- h) Present findings to union and management.
- i) Train HR staff on remuneration practices.
- j) Develop salary and benefits budgets.

#### **4.1.2. Salary Review**

- a) Include all positions in the salary review.
- b) Review salary adjustments, including cost-of-living adjustments.
- c) Advise on best practices for salary reviews.

#### **4.1.3. Benefits Review**

- a) Review all monetary and non-monetary benefits.
- b) Consider additional benefits offered by comparator organizations.
- c) Review performance-related incentives.

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## 4.2. Job Evaluation Services

- a) Present and seek approval for the Patterson methodology.
- b) Conduct evaluations based on job profiles.
- c) Provide a detailed report on methodology and recommended grades.
- d) Consider organizational structure in evaluations.
- e) Engage stakeholders for input and final submissions.
- f) Provide training on job evaluation processes.

## 5. RESPONDENTS MUST INCLUDE THE FOLLOWING:

- a) The bidder must have knowledge and experience of at least six (6) years' experience in developing, designing, and implementing remuneration practices; salary benchmarking and job evaluation.
- b) Members of the bidder's firm must have membership of South African Reward Association (SARA) and related NQF 7 qualification.
- c) The bidder must be Patterson job evaluation accredited.
- d) The Lead Consultant and/or Project Manager must have certificate in Global Remuneration Pay (GRP) Specialisation or must be a Certified Compensation Professional (CCP) or other equivalent certificate and must have five (5) years' experience in the public sector.
- e) The Consultant / Associate Consultant must be a Qualified Remuneration and Employee Benefits Specialist and must have three (3) years' experience in the public sector.
- f) The Consultant / Associate Consultant must provide evidence of developing, designing, and implementing remuneration practices, salary benchmarking and job evaluation (Patterson) initiatives, which will include providing and presenting training on the above practices.
- g) The company/organisation must be a good standing member of the **South African Reward Association (SARA)**, which is a professional body dedicated to the field of reward management in South Africa. It focuses on the development, promotion, and recognition of reward professionals. A second recommended affiliation will be:-
  - **South African Board for People Practices (SABPP)**: This is a professional body for human resource practitioners in South Africa. It

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focuses on setting HR standards and promoting professional development in the HR field.

- **Institute of People Management (IPM):** IPM is dedicated to the development and promotion of the HR profession in South Africa. It offers various training programs, certifications, and networking opportunities for HR professionals.
  - **Chartered Institute of Personnel and Development (CIPD) South Africa:** While CIPD is a UK-based organization, it has a presence in South Africa and offers professional development and certification for HR and learning and development professionals.
  - **South African Payroll Association (SAPA):** SAPA focuses on the payroll profession, offering certification, training, and networking opportunities for payroll professionals in South Africa.
- h) The bidder must provide three (3) or more signed reference letters where the similar services have been rendered, clearly stating the period of the project undertaken. Letters must be on the company letterheads and include contact details. The projects referenced should have occurred within the last six (6) years.
- i) Include the proposed methodology/implementation approach and project plan of how you will conduct the scope of work.

**NB: Failure to provide the above information will lead to disqualification.**

## 6. Duration of the Contract

- 6.1. The duration of the contract is estimated to be two (2) years from signing of the service level agreement (SLA).

## 7. RFP Submission

- 7.1. Bid documents may be emailed to [quotations@merseta.org.za](mailto:quotations@merseta.org.za) on or before the closing date and closing time.
- 7.2. The merSETA will only consider bid documents received on or before the closing date and time, regardless of the method used to provide them.

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## 8. Late submissions of the RFP

Submission of quotation(s) received late (after the closing date and time) will not be considered.

## 9. Request for Proposal (RFP) Rules

9.1. The following rules will apply for this Request for Proposal:

- a) The price(s) quoted shall be valid for a minimum period of 60 days from the closing date and time of this RFP.
- b) The price(s) quoted must be firm and inclusive of value-added tax (VAT) where applicable.
- c) The price(s) must include all related expenses, i.e., transport, accommodation, etc. (where applicable).
- d) A potential supplier or service provider must be validly registered on the Central Supplier Database (CSD), as hosted by the National Treasury.
- e) Only an official purchase order or appointment letter issued by the merSETA will bind the merSETA.

## 10. RFP Evaluation Process

10.1. The RFQ will be evaluated in terms of PPPFA 05 of 2000 and Preferential Procurement Regulation 2022 (80/20). Three (3) stages of evaluation process will be undertaken.

### 10.2. Evaluation Stage 1: Compliance

- a) All bidders must comply with the administrative requirements outlined in the Standard Bidding Documents and the mandatory requirements listed below. All bidders failing to provide the required information and documentation in this evaluation stage may face disqualification from further evaluation. Failure to comply with the requirements assessed in Stage 1 (compliance) may lead to the disqualification of bids.

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Criteria Description	Supporting Documents
In the event of the bidder being in a joint venture (JV), a signed JV agreement must be submitted (where applicable)	Signed JV Agreement SBD forms must be completed for each legal entity Consolidated B-BBEE certificate or sworn affidavit
Bidders must submit a fully complete Bidder's Disclosure form (failure to declare honestly will lead to bidder being disqualified)	Standard Bidding Document (SBD) 4
The bidder must be a good standing member of South African Reward Association (SARA).	Valid South African Reward Association (SARA) membership Certificate.

### 10.3. Evaluation Stage 2: Technical Evaluation

- b) The bids will be evaluated for functionality based on the evaluation criteria and the minimum threshold as shown in the table below. Any bid that fails to meet the overall minimum threshold of **90%** will be disqualified for further evaluation on price and specific goals.

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No	Criteria	Descriptive Indicators	Points
1.	<p>The bidder must demonstrate the capacity to deliver the service(s) as per scope of work or similar.</p> <p>Evidence of bidder's years' of experience in developing, designing, and implementing remuneration practices; salary benchmarking and job evaluation.</p> <p>The bidder's company profile must reflect such knowledge and experience for rendering the service as per scope of work or similar. The company registration document must be provided.</p>	<p>Six (6) years' and above of experience in developing, designing, and implementing remuneration practices; salary benchmarking and job evaluation and good standing membership of <b>South African Reward Association (SARA)</b> = <b>30 points</b></p> <p>Four (4) to Five (5) years' of experience in developing, designing, and implementing remuneration practices; salary benchmarking and job evaluation and good standing membership of <b>South African Reward Association (SARA)</b>. = <b>20 points</b></p> <p>Less than four (4) years' experience in developing, designing, and implementing remuneration practices; salary benchmarking and job evaluation and no good standing membership of <b>South African Reward Association (SARA)</b> = <b>0 points</b></p>	30
2.	<p>The bidder must propose either a Team Leader &amp;/or Lead Consultant, &amp;/or Project Manager</p> <p>CVs which must indicate their experience, their professional background and qualifications and Valid Membership certificate of professional body and valid certificates must be attached</p>	<p>Lead Consultant must be a Remuneration or Employee Benefits Specialist with evidence of at least five (5) and above years' of experience in developing, designing, and implementing remuneration practises, salary benchmarking and job evaluation (Patterson) initiatives, which will include providing and presenting training on the above practices <b>and</b> the lead consultant must be a member of <b>South African Reward Association (SARA)</b> and must be a <b>Certified Compensation Professional (CCP)</b> or have a certificate of <b>Global Remuneration Pay (GRP)</b> Specialisation or equivalent certificate and have related national qualifications framework (NQF) Level 7 and above. = <b>30 points</b></p> <p>Lead Consultant must be a Remuneration or Employee Benefits Specialist with evidence of at least four (4) years' of experience in developing, designing, and implementing remuneration practises, salary benchmarking and job evaluation (Patterson) initiatives, which will include providing and presenting training on the above practices <b>and</b> the lead consultant must be a member of <b>South African Reward Association (SARA)</b> and must be a <b>Certified Compensation Professional (CCP)</b> or have a certificate of <b>Global Remuneration Pay (GRP)</b> Specialisation or equivalent certificate and have related national qualifications framework (NQF) Level 7 and above = <b>20 points</b></p>	30

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No	Criteria	Descriptive Indicators	Points
		Lead Consultant must be a Remuneration or Employee Benefits Specialist with evidence of less than four (4) years' of experience in developing, designing, and implementing remuneration practises, salary benchmarking and job evaluation (Patterson) initiatives, which will include providing and presenting training on the above practices and the lead consultant must be a member of <b>South African Reward Association (SARA)</b> and must be a <b>Certified Compensation Professional (CCP)</b> or have a certificate of <b>Global Remuneration Pay (GRP)</b> Specialisation or equivalent certificate and have related national qualifications framework (NQF) Level 7 and above <b>= 0 points</b>	
3.	The bidder's track record. The bidder must provide three (3) relevant signed contactable references on the company letterheads, where the same service was rendered in the last 6 years.  The merSETA reserves the right to contact the referee.  <b>Appointment Letters / Award Letters will not be regarded as a reference letter.</b>	Three (3) and above relevant reference letters provided. = <b>20 points</b>  Below three (3) reference letters or irrelevant reference letters provided. = <b>0 point</b>	<b>20</b>
4.	The bidder must demonstrate technical capacity and provide a detailed proposed methodology / project proposal and project plan.	<b>Full compliance</b> The bidder shows <b>full</b> technical capacity in developing, designing, and implementing remuneration practices; salary benchmarking and job evaluation as well as comprehensive details or evidence for <b>all</b> of the specific areas as per scope of work. = <b>20 Points</b>  <b>Non-compliant</b> The bidder didn't meet all the mandatory requirements as per scope of work. = <b>0 point</b>	<b>20</b>
<b>TOTAL WEIGHTING</b>			<b>100</b>
<b>MINIMUM WEIGHTING SCORE</b>			<b>90</b>

Each proposal that passed functional evaluation of **90%** and more, will be on equal footing to proceed to this final round of evaluation on price and specific goals.

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### 10.3. Evaluation Stage 3: Preference Point System

- a) The 80/20 preference point system shall be applicable to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price and 20 points represent the specific goals. The bid documentation's table below will award points to a bidder for achieving the specific goals.

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Tenderer who has 51% to 100% black people ownership	6	
Tenderer who has 30% to 100% black women ownership	4	
Tenderer who has 30% to 100% black youth ownership	4	
Tenderer who has 30% to 100% White women ownership	2	
Tenderer who has 20% or more owners with disability	4	
<b>Total Points allocated to Specific Goals</b>	<b>20</b>	

**Note: Refer to Annexure A for Proof or documentation that may be considered to claim points for specific goal related to persons or categories of persons historically disadvantaged by unfair discrimination.**

## 10. COST PROPOSAL

- 10.1. All prices must be VAT inclusive (where applicable) and must be quoted in South African Rand (ZAR) as per **Annexure B**.
- 10.2. The rates of remuneration will be subject to negotiation, not exceeding the applicable rates as contained in the guidelines:
- 10.3. The "Guideline on Fees for Audits done on behalf of the Auditor-General of South Africa (AGSA)"<sup>1</sup> as issued by the South African Institute of Chartered Accountants (SAICA);
- 10.4. The "Guide on Hourly Fee Rates for Consultants", as issued by the Department of Public Service and Administration (DPSA); and/or

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- 10.5. Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant.

## 11. merSETA's RIGHTS

- 11.1. The merSETA is entitled to amend any bid condition, bid validity period, RFP terms of reference, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the merSETA has records of such bidders, may be advised in writing of such amendments in good time, and any such changes will also be posted on the merSETA's website under the relevant tender information. Therefore, before submitting their bid response, prospective bidders should regularly check the website to stay informed about any amendments related to this matter.
- 11.2. The merSETA reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the merSETA.
- 11.3. The merSETA reserves the right to award this bid as a whole or in part.
- 11.4. The merSETA reserves the right to conduct site visits at bidder's corporate offices and or at client sites if so required.
- 11.5. The merSETA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in National Treasury Instruction 02 of 2016/2017: Cost Containment Measures, where relevant.
- 11.6. The merSETA reserves the right to request all relevant information, agreements, and other documents to verify the information supplied in the bid response. The bidder hereby gives consent to the merSETA to conduct background checks, including FICA verification, on the bidding entity and any of its directors, trustees, shareholders or members.
- 11.7. The merSETA reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers, if applicable (i.e., where a panel is considered).
- 11.8. The merSETA reserves the right to make a final decision on the interpretation of its tender requirements and responses thereto.

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- 11.9. The merSETA reserves the right to consider the professional conduct and experiences it had with any bidder that rendered similar services to the merSETA in the past 5 years over and above the references put forward by the bidder in its response.

## 12. UNDERTAKINGS BY THE BIDDER

- a) By submitting a bid in response to the RFP, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the merSETA on the terms and conditions and in accordance with the specifications stipulated in this RFQ document.
- b) The bidder shall prepare for a possible presentation should merSETA require such, and the bidder will be required to make such a presentation within five (5) days from the date the bidder is notified or such a time determined by merSETA of the presentation. Such a presentation may include a practical demonstration of products or services as called for in this RFP.
- c) The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the merSETA during the bid validity period indicated in this RFP, and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- d) The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- e) The successful bidder accepts full responsibility for the proper execution and fulfillment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with merSETA, as the principal(s) liable for the due fulfillment of such a contract.
- f) The bidder accepts that all costs incurred in the preparation, presentation, and demonstration of the solution offered by it shall be for the account of the

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bidder. All supporting documentation and manuals submitted with the bid will become merSETA property unless otherwise stated by the bidder(s) at the time of submission.

- g) Should the bidder require to cede a portion of service(s) in relation to the award, the bidder must inform the merSETA in writing and merSETA reserves the right to accept or reject.
- h) The bidder undertakes to protect the confidentiality of merSETA information within the prescripts of POPI Act.



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# ANNEXURE A

## Specific Goal Guide – Preferential points (80/20)

This specific goal guide will be used to assist providers in submitting relevant documents to confirm specific goals.

“**Specific goals**” means specific goals as contemplated in section 2 (1) (d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of Reconstruction and Development programme as published in government gazette No. 16085 dated 23 November 1994.

Please note that:

- Financial account, management account or auditors’ letter should be submitted confirming turnover of the company determining BBBEE status on Affidavit and B-BBEE CIPC certificate in order for the specific goals can be awarded.

### Preferential points for tenders without local content requirements.

?

Specific goal	80/20 Preference Point system	Example of Submission	Tick if relevant document submitted	Indicate which document have been submitted
Black People Ownership – 51% or more	6	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Women Ownership – 30% or More	4	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Youth Ownership – 30% or More	4	Valid BBBEE certificate/Affidavit or B-BBEE CIPC		
White Women Ownership – 30% or More	2	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
People with Disability (PwD) Ownership	4	Medical certificate		
<b>Total Points allocated to Specific Goals</b>	<b>20</b>			

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## **ANNEXURE B**

The bidder financial proposal must be of the project and including envisaged hours and relevant hourly/daily rates inclusive of VAT, and all other relevant costs.

The "Guide on Hourly Fee Rates for Consultants", as issued by the Department of Public Service and Administration (DPSA); and/or

Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant will be applied.

The bidder must complete the attached Standard Bidding Document (SBD) 3.3.

Item	Activities	Year 1	Year 2
1.	Comprehensive salary benchmarking exercise		
2.	Remuneration and benefits review(s)  Development of a Remuneration and benefits framework.  Review of the remuneration policy and procedure and other related policies  Development of merSETA benefits structure  Reporting and Recommendation of salary levels, benefits and any other non-salary remunerations for all positions		
3.	Job Evaluation and Grading of new and existing positions (per position), ad hock as required.		
4.	Employee Engagement Surveys		
5.	Training workshop on remuneration and benefits practices		
6.	Stakeholder Engagement and Training		
7.	Travel cost (rate per kilometre (KM))		
<b>Average Rate Per Hour</b>		R	R

**NB: Costing should cover all elements as per the scope**

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AUTHORISATION SIGNATORIES TO CONFIRM RFP			
The employee signing below hereby affirms the accuracy of the information requested for the proposal.			
Supply Chain Management Representative			
Full Names	Asisipho Matomane	Date	15/08/24
Signature			
Technical Representative			
Full Names		Date	
Signature			



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