TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF OFFSITE STORAGE FOR RECORDS & FILES, ARCHIVING AND RECORD MANAGEMENT SYSTEM FOR AGRÉMENT SOUTH AFRICA FOR A PERIOD OF THREE (3) YEARS.

RFQ Number	ASA 03/01/2023
Date of Issue	10 January 2023
Bid Closing date & time	23 January 2023 @12:00 noon
Submissions	Mmosha@agrement.co.za

Technical enquiries may be directed to:

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1. Introduction

Agrément South Africa extends a call for the submission of proposals from suitable service providers to provide offsite storage for records and files for Agrément South Africa.

2. Background

Agrément South Africa was established in 1969 and has been operating within the CSIR under the auspices of its Built Environment Unit. In December 2015, Agrément South Africa was recognized an independent agency to bring an impartial judgement to the evaluation of non-standardized innovative construction products and systems in the interest of the consumer and the construction industry at large.

The Agrément South Africa Act was accented to by the Honourable President of the Republic of South Africa as Act No 11 of 2015 from 1 April 2017. Agrément South Africa being established as a Schedule 3A entity from 1 April 2017, were previously it was transferred to CSIR being a Schedule 3B entity with a staff compliment of 37 employees. The entity operates under a delegation of authority from the Minister of Public Works.

The main objectives are:

- To provide assurance of fitness-for-purpose of non-standard construction related products and systems to specifiers and users.
- To support and promote the process of integrated socio-economic development in the Republic as it relates to the construction industry.
- To support and promote the introduction and use of certified non-standardized construction related products or systems in the local or international market.
- To support policy makers in minimizing the risk associated with the use of non-standard construction related product or system; and
- To be an impartial and internationally acknowledged South African center for assessment and confirmation of fitness-for-purpose of non-standard construction related products or systems

3. Purpose

The purpose of this exercise is to appoint a service provider to provide offsite storage, archiving and records control for records and files for Agrément South Africa.

4. Scope of services

- 4.1. The prospective service provider/bidder is expected to provide a comprehensive and reliable off-site record archiving and retrieval programme, comprising the following:
- 4.1.1. A secure and safe archiving facility, which is suitable for the purpose and mitigates risks associated with records storage.
- 4.1.2. An acceptable and effective records management system to enable

the tracking and retrieval of documents.

- 4.1.3. Retrieval services for stored records at the off-site storage facility and delivery to Agrément South Africa offices.
- 4.1.4 The provision of storage boxes and relevant tracking labels for the records to be transferred from the Agrément South Africa to the off-site storage.
- 4.1.5. The collection and removal (delivery / transportation) of records and files from the Agrément South Africa offices to the off-site storage, as and when necessary.
- 4.1.6. Destruction/disposal services in accordance with National Archives Records Services requirements.
- 4.1.7. Provide Agrément South Africa with ICT back-up services including the critical aspects of the Disaster Recovery Plan.
- 4.2. Situational Analysis
- 4.2.1 Records Management Audit
- 4.2.2. Records Decongestion and clean up.

- 4.2.3 Assist in developing of Records Management Policy, Procedure
- 4.2.4 Assist in Development of a file plan.
- 4.2.5. Implementation of Electronic Documents scanning and Records Management Systems.
- 4.2.6. Assisting in Development of Retention Schedule.
- 4.2.7 Assisting Agrément South Africa (ASA)in developing the Archiving Management Unit.
- 4.2.8. Off-site storage Management services.

5. Financial Payment

Payment will be made in accordance with the PFMA (within 30 days of receipt of valid invoice).

6. Evaluation Process:

The following evaluation process shall be followed:

6.1 Basic Compliance:

- a. Pre-qualification Stage.
 - a) Potential service providers must ensure that they are registered on the National Treasury Central Supplier Database (CSD). The CSD registration report must be submitted.; and
 - b) All Supply Chain Management compliant (required) documents have been submitted. These include SBD 1, 4 and 6.1 and acknowledgement and acceptance of the General Conditions of Contract.
 - c) Completed compulsory questionnaire
 - d) Pricing Schedule

6.2 Evaluation Phases:

• Phase 1: Technical Specification and Functionality Evaluation

Functionality Evaluation	Weighting
The service provide must provide a fit for purpose project plan which	
addresses the following:	
Business Continuity Plan (BCP) to address the following:	
	20

Electricity disruptions, which will affect the electronic capturing and	
retrieval system, national strikes, etc.	
Flooding, fire, power outages of an extended period of time, etc.	
Recovery time objectives.	
Alternative location of supplier in the event of a disruption	
Delivery time in the event of a disruption	
Scoring:	
• 0 points = Bidder failed to address all the points	
• 1 point = Bidder addressed 1 out 5 items	
• 2 points = Bidder addressed 2 out 5 items	
• 3 points = Bidder addressed 3 out 5 items	
• 4 points = Bidder addressed 4 out 5 items	
• 5 points = Bidder addressed 5 out 5 items	
Risk management analysis.	10
Please provide a report on what are the risks such as fire detection and	
prevention plan involved during deployment and how could we avoid or	
mitigate them as ASA will expect the following:	
The vehicle must be suitable for safe transportation of records to be	
protected contrary to weather conditions.	
The records will be expected to be delivered and collected within 24	
hours as per request by the NHBRC. Bidder must provide fire	
detection and prevention plan.	
Scoring:	
0 Point = Bidders failed to mention safe transportation of files to their	
warehouse	
5 Points= Bidders clearly mentioned safe transportation of files to their	
warehouse.	
Transition plan	5
Submit a plan, which ensures continuity from the current file management	
system	
Scoring:	

0 points = Bidder failed to submit transition plan to ensure continuity.	
5 Points = Bidder submitted transition plan to ensure continuity.	
Capacity and experience to handle projects of a similar nature	
The service provider must provide a company profile indicating the	20
company's experience in rendering external archiving storage, electronic	
documents and file management system.	
Scoring:	
• 0 Years' Experience = 0 Points	
1 Year Experience = 1 Point	
2 Years' Experience = 2 Points	
3 Years' Experience = 3 Points	
4 Years' Experience = 4 Points	
5 and more years' Experience = 5 Points	
Contactable Client Reference Letter	
The service provider must provide positive written contactable references	15
indicating the similar services rendered.	
The reference letters from the clients of a bidder must include:	
Company name	
Company letterhead	
Contact person and contact telephone numbers	
• The letter must be signed by a duly authorised person	
Scoring:	
O Reference letter= O Points	
1 Reference letter = 1 Point	
2 Reference letters = 2 Points	
3 Reference letters = 3 Points	
4 Reference letters = 4 Points	
5 Reference letters = 5 Points	
Site Visit	30
JILL VISIT	
ACA will conduct a cita procentation and the following will be accessed as the	
ASA will conduct a site presentation and the following will be assessed on the below 5 items:	30

Existence of a storage facility and physical building that complies with	
National Archives of South Africa.	
Waterproofed and Fire proofed building	
Security and alarm systems	
Fire Extinguishers	
The bidder must provide a fire detection and prevention plan	
Scoring:	
0 points = Bidder failed to address all the points	
1 point = Bidder addressed 1 out 5 items	
2 points = Bidder addressed 2 out 5 items	
3 points = Bidder addressed 3 out 5 items	
4 points = Bidder addressed 4 out 5 items	
5 points = Bidder addressed 5 out 5 items	
Total Points	100
Minimum Threshold	70

The service provider's proposal will be evaluated against the set criteria indicated above. A form will be used which will reflect the name of the service provider, the different criteria, with space provided to record the points awarded and motivation for points awarded. The allocation of points will not be affected on a basis of consensus.

The following formula will be used to convert the points scored against the weight:

$$Ps = \left(\frac{So}{Ms}\right) x 100$$

Where:

Ps = Percentage scored for functionality by bid under consideration

So = Total score of bid under consideration

Ms = Maximum possible score

Service providers will be expected to achieve a minimum threshold score of 70% to proceed to Phase 2.

Phase 2: Calculation of points

Please note for quotations or bids above R30 000 up to R50 Million, ASA evaluates these in terms of the 80/20 preference point system where:

80 points are allocated for price and 20 points are allocated for the service provider's B-BBEE Level of Contribution. An original or certified copy of a B-BBEE certificate must be submitted to substantiate claims for preference points.

ASA also reserves the right to investigate of the bidder's financial position, previous contracts carried out, availability of skills or knowledge, existing workload, etc.

During phase 2, points for price will be calculated for all shortlisted service providers in accordance with the following formula:

$$Ps = 80 \left(1 - \frac{Pt - P\min}{P\min} \right)$$

Where:

Ps = Points scored for price of quotation under consideration

Pt = Rand value of quotation under consideration Pmin = Rand value of lowest acceptable quotation

The final points will be calculated as follows:

CRITERIA	SUB-CRITERIA	WEIGHTING POINTS
Price	Detailed budget breakdown	80
B-BBEE (Status Level Verification Certificate)	B-BBEE Level Contributor	20
TOTAL		100

POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

In terms of Regulation 6 (2) and 7 (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

B-BBEE Status Level of Contributor	Number of points (80/20 system)	
5	8	
6	6	
7	4	
8	2	
Non-compliant contributor	0	

EMEs are deemed to have a B-BBEE status level four (4) contributor, in instances where EMEs are more that 50% black owned, such enterprise qualify for promotion to a BBBEE status level three (3) contributor and points will be awarded accordingly.

Please note that the proposals will be evaluated using the 80/20 preference point system.

A recommendation for award will then be formulated for approval by the relevant delegated authority.

9. Monitoring and Evaluation

9.1. Evaluate the impact of the service

Agrément South Africa Corporate Services will determine the evaluation criteria, agreed criteria will determine the level and technique of measuring the impact of the service.

9.2. Complaints handling mechanism

The appointed service provider must implement and exercise the necessary measures to address complaints with corrective measures and provide to ASA.

9.3 Time frames

Set up agreed turnaround times for findings and complaints.

10. Required documentation for submission

- a. Company profile.
- b. List and supporting documents of all company directors.
- c. Valid original tax clearance certificate with good standing.
- d. Pricing Schedule.
- e. Compulsory questionnaire.

Important Notes:

- I. Pricing must be inclusive of VAT.
- II. Proposals must be emailed to mmosha@agrement.co.za
- III. The closing date for submission of proposals is the 23 January 2023 at 12:00pm.
- IV. NO LATE SUBMISSIONS WILL BE ACCEPTED

ANNEXURE A

Retrieval cost per box

Description	Unit Cost per Box
Year 1 Retrieval cost	
Year 2 Retrieval cost	
Year 3 Retrieval cost	
Year 4 Retrieval cost	
Year 5 Retrieval cost	
Total inclusive of VAT	

Scanning cost per Box

Description	Unit Cost per Box
Year 1 Scanning cost	
Year 2 Scanning cost	
Year 3 Scanning cost	
Year 4 Scanning cost	
Year 5 Scanning cost	
Total inclusive of VAT	

Storage Boxes

Description	Unit Cost per Box
Year 1 Empty Boxes	
Year 2 Empty Boxes	
Year 3 Empty Boxes	

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Year 4 Empty Boxes	
Year 5 Empty Boxes	
Total inclusive of VAT	

Description	Rate per Hour
Archiving Specialist	
Training Cost	
Any other services	

COMPULSORY QUESTIONNAIRE

The following is a compulsory questionnaire for the bidder to complete. Failure to complete this questionnaire WILL result to disqualification

PLEASE NOTE: The questionnaire/ check list is split between compulsory requirements and other requirements. Should you not comply with the compulsory requirements, your bid will not be successful. All requirements will be verified during the site visit (please see evaluation criteria).

PRE-QUALIFICATION CRITERIA			
	Yes	No	Proof attached
Is the facility where records are kept a fixed structure, designed for purpose and used only (dedicated) for records?			
Are records stored in conditions aligned with National Archiving Records Services prescripts?			
Does the facility have adequate fire detection systems connected to a central monitoring panel divided into areas, inclusive of an early warning system?			
Is the fire system regularly inspected and tested?			
In case of system failure, are there strategically placed portable fire extinguishers, which is regularly tested and serviced?			
Are the entire facility covered by the fire detection system?			
Are the entire facility alerted to a fire?			
In the event of a fire, is the nearest fire brigade automatically warned?			
Are staff trained to address fire outbreak?			
Are systems that could contribute to spreading the fire, e.g. HVAC, automatically shut down?			
Does your company have 24-hour monitored security?			
Does your company have monitored, access-controlled warehouse and vault systems?			
OTHER REQUIREMENTS			

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	Yes	No Proof
SECURITY/SAFETY- please demonstrate your company's security		acce
solution and attach proof where applicable. Below are some of the		
questions that would need to be addressed:		
Are the alarm systems linked to SAPS and/or private security company		
Are the access controls specific to a person and linked to specific areas, e.g.		
vaulting area accessible only by authorised personnel?		
Are your facilities located in a safe area in terms of flood planes, industrial installations, etc?		
Does the company have in-house security training and procedures, and are		
staff trained accordingly?		
Is the security company outsourced or in-house?		
Is the loading/ unloading bays secure?		
Do your facilities, shelving, containers and equipment comply with OHS		
standards?		
Do you have an OHS register and policy in place?		
Is your staff trained for emergency evacuations?		
Are the systems checked regularly?		
2. COURIER SERVICE - please demonstrate that your company's ability to		
provide courier services in compliance with the relevant standards and		
attach proof where applicable. Below are some of the questions that		
would need to be addressed:		
Are the vehicles designed for the safe transport of records?		
Are the vehicles secure, e.g. are their movement tracked, etc?		
3. POLICIES AND PROCEDURES - please demonstrate that your company		
has clear policies and procedures in place to manage the day-to-day		
activities and attach proof where applicable. Below are some of the		
questions that would need to be addressed:		
Do you screen employees?		
Does your company have clear and acceptable business practices and have staff been trained on these principles?		
Do you have confidentiality agreements in place with staff?		
4. STORAGE CAPABITIES - please demonstrate that your company has the		
ability to provide the necessary storage facilities and have a clear		
strategy to accommodate growth. Please attach proof where applicable. Below are some of the questions that would need to be		
addressed:		
Is your company able to store documents, back-up tapes, etc.?		
How are maps stored?		
How are hard copy records stored?		
How are electronic records stored?		
5. PHYSICAL CARE - please demonstrate that your facility complies with		
applicable standards and attach proof where necessary. Below are		
some of the questions that would need to be addressed:		
Is the facility humidity controlled?		
What is the cleaning schedule?		
What is the fumigation schedule?		
6. CUSTOMER SERVICE - please demonstrate that your company can		
o. Coordinate Service - picase demonstrate that your company can		

necessary. Below are some of the questions that would need to be addressed:		
Do you provide client procedures and training?		
Do you provide confidential destruction services compliant with all applicable Acts?	A	
What is the procedure your company follows in the event of a client requesting the destruction of records?		
Are you POPI compliant?		
What contingency planning is in place in the event of a disaster and how are you covered?		
Do you have a web-based system available for customer use?		
Does your company have a quality management system (ISO 9001: 2015), which guarantees its control of documents and records?		
Does your company have an implemented procedure for record and document control?		