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| SCM /Tender Ref #: | RFP 02-2023/24 |
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| Request for proposals for: | Procurement of service provider to conduct an analysis of the 1 <sup>st</sup> and 2 <sup>nd</sup> 2023/24 Draft Annual Performance Plans (APPS) of national and provincial departments for the period of six (6) months. |
|----------------------------|--|

Bid closing date and time as well as the date and time of briefing session (if any) are indicated on the attached SBD1. Quotations / proposals received after the closing date and time indicated on SBD 1 will not be accepted.

Bidders must provide one original and 5 (five) copies of proposals submitted.

Only 1 (one) original price proposal and SBDs are required.

| Estimated project start date: | Expected project duration (Months) |
|-------------------------------|------------------------------------|
| 01 November 2023              | 6 Months                           |

## 1. BID INFORMATION

Information and guidelines on the format and delivery of bids are contained in the attached bid documents. Please take note of the closing date and date of compulsory briefing session (if any).

## 2. PROPOSAL FORMAT

**A detailed proposal in response to this ToR must be submitted.** The proposal should contain all the information required to evaluate the bid against the requirements stipulated in this terms of reference. The following must be attached to the proposal as annexures:

- **Annexure B1:** Proposed team (Must use attached Excel template)
- **Annexure B2:** Summary of past experience of team members (Must use attached Excel template)
- **Annexure B3:** Pricing information. Price proposals must include VAT and should be fully inclusive to deliver the all outputs indicated in the terms of reference (Must use attached Excel template).
- The published terms of reference (this document, including Annexure A to this document).
- All other forms / certificates required (see bid documents).

## 3. CONDITIONS OF BID

Detailed conditions applicable to all bids are contained in the bid documents accompanying this Terms of Reference. Only suppliers that meet all the requirements stipulated in the terms of reference and bid documents will be considered.

No late bids will be accepted. Only bids from service providers that attended the compulsory briefing session (if specified above) will be considered. Bids must be valid for a minimum period of 120 days after the closing date.

| ENQUIRIES |  |  |
|-----------|--|--|
| Name:     | Mr. Lanwani Hlasi  | SCM general  |
| e-mail:   | <a href="mailto:Lanwani.Hlasi@dwypd.gov.za">Lanwani.Hlasi@dwypd.gov.za</a> | <a href="mailto:Tenders@dwypd.gov.za">Tenders@dwypd.gov.za</a> |

## 1. BACKGROUND

Annexure A contains a detailed description of the requirements for this project, including:

- Background / context
- Problem statement / purpose
- Objectives and scope of project
- Proposed methodology / approach
- Deliverables and time frames

## 2. EXPERIENCE / SKILLS / TEAM COMPOSITION / PAST PERFORMANCE

The attached spread sheet must be used to summarise qualifications, skills and past experience and to cost the proposal.

### 2.1. Team composition

#### 2.1.1. Empowerment requirements

The proposed team must meet the following empowerment requirements:

- **Black PDI%:** At least 30% of the person-days required to complete this project must be allocated to Previously Disadvantaged Individuals (PDIs)<sup>1</sup>; and
- **Gender%:** At least 40% of the person-days required to complete this project must be allocated to women; or
- **Youth%:** At least 30% of the person-days required to complete this project must be allocated to youth (persons aged 35 or younger); or
- **Persons with Disabilities:** At least 7% of the person-days required to complete this project must be allocated to persons with disabilities.
- **Empowerment spend:** At least 30% of the fully inclusive resource cost for all deliverables must be allocated to Black PDIs.

Annexure B1 must be completed and the required details of each team member must be provided. Team members indicated in the proposal must be available for the duration of the project and must play a meaningful role in the project. Replacement of team members may only be done in consultation with DWYPD and replacement team members must have the same PDI profile as well as qualifications / experience as those they are replacing.

#### 2.1.2. Qualifications and Experience required

Bidders will demonstrate adequate experience through the number, types and geographical spread of projects/assignments undertaken. The attached template must be used to summarise experience and the proposal must contain details about projects worked on including roles, cost and duration as well as names and contact persons at contracting party.

| Roles*                         | Qualifications  | Experience   |
|--------------------------------|---|--|
| Project manager                | Minimum: Any tertiary qualification.<br>Advantage: qualification in project management  | Minimum: Successfully managed and completed at least 3 projects to the value of R500 000.00 each.        |
| Strategic Planning specialists | Minimum: Three year degree in business management or Social Science and related fields.<br>Advantage: Master degree in business management or a related fields. | Minimum: At least 5 years work experience in provincial or national government plan process and systems. |

<sup>1</sup> By Black PDIs we mean South African citizens who are Black, Indian, or Coloured.

| <b>Roles*</b>   | <b>Qualifications</b>   | <b>Experience</b>   |
|---|---|---|
| Sector expert(s)**:<br>(Gender/youth Mainstreaming)                           | Minimum: Under graduate degree or qualification in development Studies or related fields<br>Advantage: Certified qualification on mainstreaming (Gender/Youth and Disabilities studies)                       | Minimum: At least 2 years work experience in gender or youth or disabilities mainstreaming. |
| Other expert(s)**:<br>(Researchers and Monitoring and Evaluation specialists) | Minimum: Degree in Public Administration or Local Government or Development Studies or Social Science, Economics or related fields.<br><br>Advantage: Postgraduate qualification in Monitoring and Evaluation | Minimum: At least 2 years work experience in research, monitoring and evaluation field.     |

*\* One team member cannot have more than two of the roles indicated.*

*\*\* Score will be combined for all experts – All experts must meet a minimum score of each criteria stipulated above to receive a score of 3.*

## **2.2. Confirmation of experience, qualification and availability**

The following must be submitted for each of the proposed team members:

- Written confirmation of availability (signed by the proposed team member) for the expected duration of the project to produce the deliverable(s).
- Detailed CV indicating qualifications, previous experience as well as letters of reference (references must be contactable).
- Copies of qualifications.

DWYPD reserves the right to verify all qualifications through the South African Qualifications Authority and to verify experience indicated on CVs with third parties.

## **2.3. Past performance**

The past performance of bidders in executing similar projects will be evaluated using the references supplied by bidders as well as any other information available to the panel. Below satisfactory performance on a particular project may only be considered if such performance was communicated to the bidder by the contracting party and the bidder was given a reasonable opportunity to correct any deficiencies highlighted by the contracting party. The Department reserves the right to reject a bid if the service provider failed to perform satisfactorily on similar projects.

## **2.4. Project management**

The bid proposal submitted by the bidder must include a detailed project plan. As summary of deliverable dates must also be included in the proposal. The start of the project will depend on the DWYPD procurement process. The total duration of the project as indicated in the bidder's proposal is binding (except for delays due to circumstance beyond the bidder's control).

## **3. COSTING METHODOLOGY**

Prices must be inclusive of VAT (if VAT registered) and must include all costs to fully execute all deliverables indicated in this ToR. No variation in contract price will be permitted. Annexure B3 must be used to summarise costing.

## 4. EVALUATION OF BIDS

### 4.1. Administrative requirements

Annexures B1 to B3 **must** be completed using Microsoft Excel or compatible software. Annexures completed by hand (in writing) will not be accepted and such bids will be regarded as administratively non-compliant.

Only bids / quotes that comply with all administrative requirements and that submitted all required bid documents (acceptable bids) will be considered during the functional evaluation phase. Only acceptable bids / quotes will be scored by the Bid Evaluation Committee against the functional criteria indicated in this Terms of Reference.

### 4.2. Scoring of bids (functional criteria)

The following weighting and scoring system will be applied to the evaluation of all functional criteria:

| Weight allocation  | Scoring system                            |
|--|---|
| 1 – Value adding requirement (minimum score of 2)                          | 1 – Does not comply with the requirements |
| 3 – Important requirement (minimum score of 6 or 9)                        | 2 – Partial compliance with requirements  |
| 4 – Essential requirement / integral part of project (minimum score of 15) | 3 – Full compliance with requirements     |
|  | 4 – Exceeds requirements                  |

**Score per criteria:** The final score obtained by a bidder for each criteria will be calculated by multiplying the weight and the score indicated by each Bid Evaluation Panel member and then by averaging the scores of all panel members. The average score per criteria is expressed as a number.

The **overall score** obtained by a bidder (expressed as a percentage) will be calculated as follows:

$$\text{Overall Score (\%)} = \frac{\text{Sum of average scores for all criteria}}{\text{Sum of weights} \times 4} \times 100$$

### 4.3. Functional evaluation Part 1 – Quantitative criteria

**Part 1: Minimum functional requirements:** Only bids that scored at least the minimum score for each criteria will proceed to functional evaluation part 2. In cases where bidders submitted insufficient evidence or where evidence is ambiguous, bidders may be requested to provide additional evidence and may be re-scored based on this information. Additional information submitted may only be used as evidence to substantiate what is already contained in the proposal. The costing and content of proposals may not be amended.

| Functional Evaluation Criteria |   | Weight | Min. Score |
|--------------------------------|---|--------|------------|
| 1.1                            | <b>Team composition (par 2.1.1 of ToR and Annexures B and B1):</b><br>1= Proposed team does not meet the empowerment criteria.<br>3= Proposed team meets the empowerment criteria.<br>4= Proposed team meets the empowerment criteria and achieved 50% or more in at least 2 criteria.  | 9      | 3          |
| 1.2                            | <b>Project manager (par 2.1.2 of ToR):</b><br>1= The Project Manager does not meet the minimum for either experience or qualifications, or did not submit verifiable references, or did not submit written confirmation of availability for project.<br>3= The Project Manager meets all of the minimum experience or qualifications, or submitted verifiable references, or submitted written confirmation of availability for project requirements.<br>4= The Project Manager exceeds the minimum experience, qualifications, submitted verifiable references and submitted written confirmation of availability of project requirements. | 9      | 3          |

| Functional Evaluation Criteria |   | Weight | Min. Score |
|--------------------------------|---|--------|------------|
| 1.3                            | <b>Strategic Planning specialist (par 2.1.2 of ToR):</b><br>1= The Strategic Planning specialist(s) experts does not meet the minimum requirements for either experience or qualification, or did not submit verifiable references, or did not submit written confirmation of their availability for the project.<br>3= The Strategic Planning specialist(s) meet(s) all of the minimum experience or qualification or submitted verifiable references or submitted written confirmation of their availability for the project requirements.<br>4= The Strategic Planning specialist(s) exceed(s) the minimum experience, qualification, submitted verifiable references and submitted written confirmation of availability for the project requirements. | 9      | 3          |
| 1.4                            | <b>Sector expert(s) ** (par 2.1.2 of ToR):</b><br>1= The sector(s) experts does not meet the minimum requirements for either experience or qualification, or did not submit verifiable references, or did not submit written confirmation of their availability for the project.<br>3= The sector(s) meet(s) all of the minimum experience or qualification or submitted verifiable references or submitted written confirmation of their availability for the project requirements.<br>4= The sector(s) exceed(s) the minimum experience, qualification, submitted verifiable references and submitted written confirmation of availability for the project requirements.  | 9      | 3          |
| 1.5                            | <b>Other expert(s) ** (par 2.1. 2 of ToR):</b><br>1= The expert(s) does not meet the minimum requirements for either experience or qualification, or did not submit verifiable references, or did not submit written confirmation of their availability for the project.<br>3= The expert(s) meet(s) all of the minimum experience or qualification or submitted verifiable references or submitted written confirmation of their availability for the project requirements.<br>4= The expert(s) exceed(s) the minimum experience, qualification, submitted verifiable references and submitted written confirmation of availability for the project requirements.  | 9      | 3          |

**\*\* Combines score for all experts – All experts must meet minimum criteria stipulated above to receive a score of 3.**

#### 4.4. Functional evaluation Part 2 – Qualitative criteria

The functional evaluation criteria indicated below will be applied during Part 2 of functional evaluation to all bids that met the minimum requirements stipulated under Functional evaluation Part 1. During part 2 the Bid Evaluation Committee may:

- Evaluate and score bids based on the bid documents and proposals submitted; or
- Provisionally evaluate and score bidders based on proposals submitted and then invite bidders that met all requirements under Part 1 and a provisional overall score of at least 60% for both functional evaluation parts 1 and 2, to present their bids.

The final evaluation and scoring of bids will based on the proposals submitted, as well as on information provided by bidders during bid presentations (if applicable). Presentations can be used to summarise and clarify bids and may not substantially depart from the proposals submitted.

If a bidder is unable to attend a bid presentation on the date requested by the Bid Evaluation Committee, then the bidder must be afforded another opportunity within 5 workings. If a bidder is for a second time unable to attend a bid presentation then the bid must be evaluated based on the bid documents and proposals submitted only.

**Part 2: Minimum functional requirements:** Only bids that obtained the minimum score for each criteria as well as an overall score of at least 75% for both functional evaluation parts 1 and 2, will proceed to Price/PPFA evaluation.

| Functional Evaluation Criteria |   | Weight | Min. Score |
|--------------------------------|---|--------|------------|
| 2.1                            | <b>Understanding the brief. The proposal and / or presentation by the service provider:</b><br>1= Did not address the problem statement of the project.<br>2= Proposal shows minimal understanding of the sector and partially addresses the problem statement of the project.<br>3= Proposal shows good understanding of the sector and fully addresses the problem statement of the project.<br>4= Proposal shows exceptional understanding of the sector and policy issues, the problem statement of the project responded innovatively and proposal offered added value to the project. | 15     | 5          |
| 2.2                            | <b>Proposed approach (Annexure A, par 6)</b><br>1= Proposed methodology is not aligned to the purpose and objectives.<br>2= Proposed methodology is partially aligned to the purpose and objectives.<br>3= Project design, sample, data collection tools and analytical framework proposed is fully aligned to the purpose and objectives.<br>4= In addition to 3, the methodology is innovative and will add value beyond the originally intended purpose and objectives of the project.   | 15     | 5          |
| 2.3                            | <b>Extent to which the costing methodology is realistic given the scope and time frames of the project (Annexure A, par 6)</b><br>1= Costing of the project is not aligned to the scope and times frames of the project.<br>2= Costing of the project not entirely aligned to scope and time frames and may negatively impact delivery.<br>3= The costing methodology is realistic given the scope and time frames of the project.<br>4= The costing methodology provides innovative solutions to reduce costs associated with the project.   | 9      | 3          |
| 2.4                            | <b>Project plan (par 2.4 of ToR):</b><br>1= No project plan included in bid.<br>2= Project plan does not fully address all deliverables or does not indicate completion within the required time frames.<br>3= Project plan addresses all deliverables and indicates completion of the project within the required time frames.<br>4= Project plan addresses all deliverables and indicates completion of the project in significantly less than the envisaged time frames.   | 9      | 3          |

#### 4.5. Price / Specific Goals

Only bids that meet the minimum administrative and functional requirements / specifications indicated in the ToR (qualifying bids) will be evaluated in terms of the Preferential Procurement Framework Act and related regulations – see attached bid documents. The evaluation method (80/20 or 90/10) and preference points allocation applicable to this bid are indicated in the attached SBD 6.1.

## 5. CONTRACT MANAGEMENT

The successful bidder will be required to enter into a service level agreement (SLA) with the Department of Women, Youth, and Persons with Disabilities. The National Treasury General Conditions of Contract (GCC) will form part of the SLA to be concluded between DWYPD and the successful bidder. A copy of the standard DWYPD SLA is available on the DWYPD tender's website. Bidders should familiarise themselves the content of the standard template.

Bidders should note that:

- All information related to this bid, or information provided to the service provider subsequent to the award of this bid, must be treated as confidential and may not be disclosed in any way to third parties without the explicit written consent of DWYPD.
- All right, title and ownership of any Intellectual Property developed by or for the Service Provider or DWYPD independently and outside of execution/production of the Deliverables related to this bid, and provided during

the course of this project ("Background IP") shall remain the sole property of the party providing the Background IP.

- To the extent that the Service Provider utilises any of its Background IP in connection with the Deliverables, such Background IP shall remain the property of the Service Provider and DWYPD shall acquire no right or interest therein, save that, upon payment of the applicable consideration, the Service Provider shall grant DWYPD a non-exclusive, royalty-free, non-transferable licence to use such Background IP strictly for purposes of making beneficial use of the Deliverables into which such Background IP has been incorporated.
- All Intellectual Property rights in Bespoke Deliverables are or will be vested in and owned by DWYPD unless specifically agreed otherwise in writing. The Service Provider agrees that it shall not, under any circumstances, question or dispute the rights and ownership of DWYPD in and to the Bespoke Deliverables. DWYPD shall grant the Service Provider a non-exclusive, royalty free, non-transferable licence to use the Bespoke Deliverables for the purpose of performing its obligations under this project.
- The Service Provider may not publish or sell, in whole or in part, any Bespoke Deliverables emanating from this project without the explicit written consent of DWYPD.
- The Copyright of any Bespoke Deliverables shall vest in DWYPD.

#### **6. SPECIAL CONDITIONS APPLICABLE TO THIS BID**

None