

ANNEXURE B

EVALUATION CRITERIA

APPOINTMENT OF A SERVICE PROVIDER FOR THE BUSINESS SYSTEM SERVICE PROVIDER **(SaaS)**

1.1 Phase 1 Technical Evaluation

Bidders will be evaluated according to the below technical evaluation criteria. Minimum Technical Threshold is **75%**. It must be noted that if the Bidder does not meet the **75%** minimum threshold, the bidder will be disqualified.

The service provider and the team (Engagement partner/director and stream leaders) must demonstrate the following experience.

Evaluation Criteria	Evidence to be considered	Min points	Max points
Integrated Strategic Planning: The service provider must demonstrate to have successfully rolled out customer installations that support integrated strategic planning. The solution must contain structures for: scorecards, perspectives, strategic objectives, KPIs, other management models where performance indicators are involved. The solution functionality must include enterprise risk management, flexible reporting dashboards, cascading of KPIs and initiatives, ability to upload and download/export documents to Pdf, Excel, PowerPoint and Word.			
• 15 customer installations or more (10%) • 10 customer installations or more (8%) • 5 customer installations or more (5%) • 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and reference letter Requirement to show experience in the automated support of Corporate Plans and Operational Plan for complex organisations.	3%	10%

Evaluation Criteria	Evidence to be considered	Min points	Max points
Financial performance reporting The team (Engagement partner/director and stream leaders) must have experience in installation of similar solution.			
• 15 customer installations or more (15%) • 10 customer installations or more (12%) • 5 customer installations or more (8%) • 3 customer installations or more (5%)	Brief description of work done supported by Curriculum Vitae and client reference letter.	3%	10%
Operational performance reporting The team must demonstrate experience in system support for the reporting of operational KPIs			
• 15 customer installations or more (15%) • 10 customer installations or more (12%) • 5 customer installations or more (8%) • 3 customer installations or more (5%) • Less than 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and client reference letters.	3%	10%
Business scorecards and the cascading thereof The team must demonstrate experience in the construction of business scorecards, cascading and integration. Individual Divisional / Departmental Heads should be able to formulate from the top-level scorecards such items for their own function as the functional scorecard, risks, active audit finding, action items, projects, and enterprise risks. The system must support this functionality.			
• 15 customer installations or more (10%) • 10 customer installations or more (8%) • 5 customer installations or more (5%) • 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and client reference letter.	3%	10%

Evaluation Criteria	Evidence to be considered	Min points	Max points
Enterprise Risk Management - The team must demonstrate experience in the system support of risk management reporting through corporate scorecards, and monitoring of treatment plans. The system must support this functionality.			
• 15 customer installations or more (10%) • 10 customer installations or more (8%) • 5 customer installations or more (5%) • 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and client reference letter	3%	10%
Governance Management The team must demonstrate experience in the support of governance through the corporate business reporting systems. The system must support this functionality.			
• 15 customer installations or more (10%) • 10 customer installations or more (8%) • 5 customer installations or more (5%) • 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and client reference letter.	3%	10%
Stakeholder Management and Customer Relations Reporting The team must demonstrate experience in the system support of stakeholder issue tracking, customer relations support and similar business functions. The system must support this functionality.			
• 15 customer installations or more (10%) • 10 customer installations or more (8%) • 5 customer installations or more (5%) • 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and client reference letter.	3%	10%
Human Capital Management			

Evaluation Criteria	Evidence to be considered	Min points	Max points
The team must demonstrate experience in the system support of scorecard-cascading all the way to designated individual employees. That is, a top level KPI, an action item, an audit finding, a business risk, may be cascaded to an employee to address.			
• 15 customer installations or more (10%) • 10 customer installations or more (8%) • 5 customer installations or more (5%) • 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and client reference letter.	3%	10%
Data Management The team must demonstrate experience in the system support of data management for business performance reporting:			
• 15 customer installations or more (10%) • 10 customer installations or more (8%) • 5 customer installations or more (5%) • 3 customer installations or more (3%)	Brief description of work done supported by Curriculum Vitae and client reference letter.	3%	10%
Experience of the Project Manager The Project Manager that will be managing the project must have a minimum of five (5) years' experience in similar service:			
• 8 and more years of experience (10%) • 5 years of experience but < 8 years of experience (8%) • 5 years of experience (5%) • < 5 years of experience (3%)	Provide a copy of a C.V. of the Project Manager detailing the relevant years of experience in similar service.	3%	10%
Scores		30%	100%

1.2. PHASE 2: COMMERCIAL EVALUATION

CEF (SOC) Ltd will utilise the following formula in its evaluation of Price offers:

[Weighted score 80 points]

$$PS = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where:

Ps = Score for the Tender under consideration

Pt = Price of Tender under consideration

Pmin = Price of lowest acceptable Tender

Preference points/specific goals criteria

[Weighted score 20 points]

Specific goals / Preference Points Claim

Evaluation Criteria	Final Weighted Scores
Price	80
Specific goals	20
TOTAL SCORE:	100

A maximum of 20 points will be awarded to a tenderer for specific goals specified for the tender/RFQ as follows:

Specific goals	Points
Historically disadvantaged individual (HDI)	
Enterprises with ownership of 51% or more by person/s who are black	10
Enterprises with ownership of 51% or more by person/s who are women	5
Enterprises with ownership of 51% or more by person/s who are youth	3
Enterprise with ownership of 10% or more by person/s with disability	2
Total	20

- Tenderers must submit their B_BBEE certificate issued by an authorized body or person or a B-BBEE sworn affidavit to claim preference points.
- The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.
- The contract must be awarded to the tenderer scoring the highest points.
- If two or more tenders score an equal total number of points, the contract must be awarded to the tenderer that scored the highest points for specific goals, and if two or more tenderers score equal total points in all respects, the award must be decided by the drawing of lots.