

APPOINTMENT OF A SERVICE PROVIDER FOR ONE-ON-ONE EXECUTIVE COACHING SERVICES

Briefing Session: 01 October 2020 at 11H00

RFP No.: RFP 11/2020

Closing Date: 19 October 2020, 11h00

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- 2. RFP Timelines**
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- 8. Q&A**

Bid Evaluation Committee

Procurement

Sourcing Lead: Professional Services – Project Oversight

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Bid Opening

Value Delivery Planning – Price Evaluator

Financial Analysis team

B-BBEE Evaluator

SARS Business Unit

Bid Specification Committee

Technical Evaluators X 3

Corporate Legal Services

Legal Specialist

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RFP Timelines

| ACTIVITY | DUE DATE |
|--|--------------------------------|
| RFP Advertisement in Government Tender Bulletin & e-Tender | 25 September 2020 |
| Tender documents on SARS website | 25 September 2020 |
| Non-compulsory (virtual) briefing session | 01 October 2020 at 11H00 |
| Questions relating to RFP | 25 September – 14 October 2020 |
| RFP Closing Date | 19 October 2020, 11h00 |
| Notice to bidders | February / March 2021 |

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Background and Scope of work

Refer to section 8 of the RFP document.



Adobe Acrobat
Document

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Gate 0

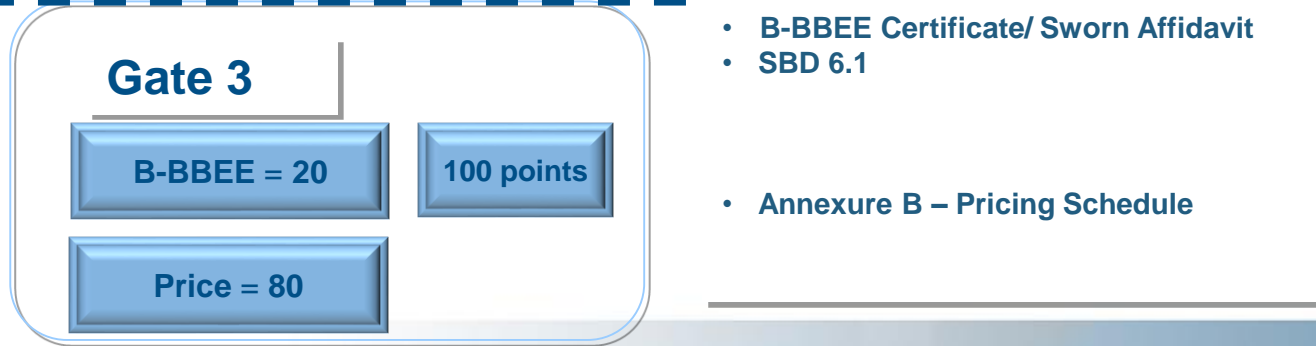
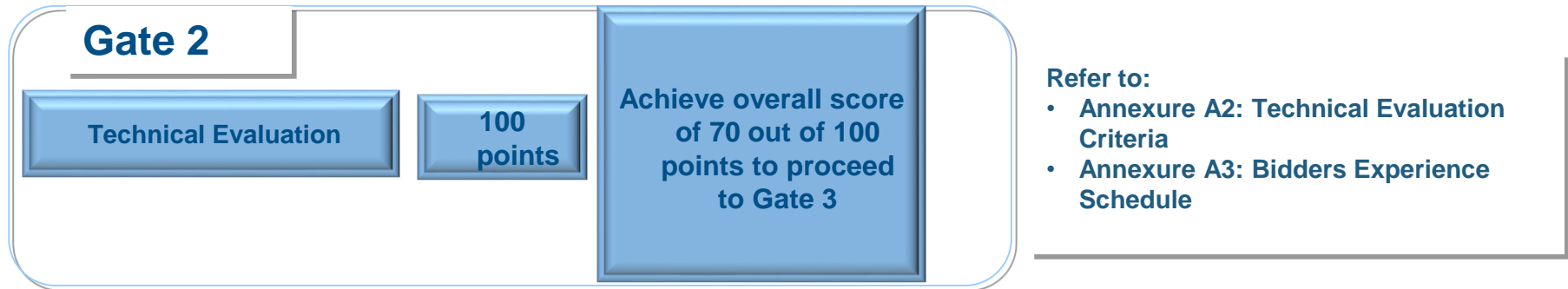
Pre-Qualification

- Invitation to Bid SBD 1
- Tax Compliance status pin
- Central Registration Report (Central Database System) from NT
- GCC & Draft Services Agreement
- SARS Oath / Affirmation of Secrecy
- Declaration of interest SBD 4
- Preference Point Claim form- SBD 6.1
- Declaration of Bidder's Past SCM Practices – SBD 8
- Certificate of Independent Bid Determination – SBD 9
- Supplier cost and risk assessment questionnaire
- Financial Statements for the three most recent financial periods
- Bidder Compliance checklist for Technical Evaluation

Gate 1

Mandatory Requirements

Minimum B-BBEE Status level 3



Technical Requirements

Bidders are required to complete Annexure A1 to assist the evaluators to locate technical responses.

| Section No | Technical Criteria | Compliant | Partially Compliant | Non-Compliant | Reference page in Proposal | Comments |
|------------|--|----------------|---------------------|---------------|----------------------------|---|
| 1.2 | Experience of the bidder | Yes | | | Page 9 to 12 - exhibit 2 | |
| 2.1 | Provide the approach, processes and methodology that will be applied by demonstrating the alignment to the SARS requirements and scope of work. | EXAMPLE | Yes | | Page 13 to 15 - exhibit 2 | Bidder to state reason for partial compliance |
| 2.2 | Demonstrate the capability and capacity to deliver the service | | | No | Page 17 to 20 - exhibit 5 | Bidder to state reason for non-compliance |

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Bid Evaluation Process Gate 3 (Price & B-BBEE)

PRICING

Bid Evaluation Process Gate 3 – Price

The Price and B-BBEE points will be added together to determine each bidder's overall score out of 100 points.

Stage 1: Price Evaluation (80 points)

Bidders must refer to Annexure B – Pricing Schedule



Microsoft Excel
Worksheet

| Adjudication Criteria | Points |
|-----------------------|--------|
| Price Evaluation | 80 |

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

P_s = Points scored for price of Bid under consideration
 P_t = Rand value of Bid under consideration
 P_{\min} = Rand value of lowest acceptable Bid

Bid Evaluation Process Gate 3 (Price & B-BBEE)

B-BBEE

Bid Evaluation Process Gate 2 – B-BBEE

Stage 2: B-BBEE Evaluation (20 points)

B-BBEE points may be allocated to Bidders on submission of documentation or evidence as follows:

| Adjudication Criteria | Points |
|---|--------|
| A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1) and a B-BBEE certificate. | 20 |

Bidders, who do not complete SBD 6.1 in its entirety, will not be awarded points for B-BBEE.

B-BBEE Certificate

The table below indicates the B-BBEE documents that must be submitted for this bid. Failure to submit the required documents will result in bidder(s) scoring zero (0) for B-BBEE.

| No. | Classification | Turnover | Submission Requirement |
|-----|-----------------------------------|--|---|
| 1. | Exempted Micro Enterprise (EME) | Below R10 million p.a. | Sworn affidavit or a certificate from the Companies and Intellectual Property Commission (“CIPC”) or a certified copy of a B-BBEE Rating Certificate from a SANAS accredited rating agency. |
| 2. | Qualifying Small Enterprise (QSE) | Between R10 million and R50 million p.a. | Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a DTI Affidavit – only 51% Black Owned (BO) and above. |
| 3. | Large Enterprise (LE) | Above R50 million p.a. | Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency. |

SARS reserves the right to request that bidders submit proof of their black ownership and turnover information, in support of their sworn affidavits.

B-BBEE key Sections to complete in SBD6.1

5. BID DECLARATION

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 5.1

6.1 B-BBEE Status Level of Contribution:.....=(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

| | | | |
|-----|--------------------------|----|--------------------------|
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....%

ii)The name of the sub-contractor.....

iii) The B-BBEE status level of the sub-contractor.....

iv)Whether the sub-contractor is an EME or QSE

(Tick applicable box)

| | | | |
|-----|--------------------------|----|--------------------------|
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|

Bidders who want to claim preference points will have to comply fully with regulations 12(1) and (3) of the Preferential Procurement Regulations, 2017 with regard to subcontracting:

Regulation 12 – Subcontracting after award of tender

- (1) A person awarded a contract may only enter into a subcontracting arrangement with the approval of the organ of state.
- (2) A person awarded a contract in relation to a designated sector, may not subcontract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- (3) A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an Exempted Micro Enterprise that has the capability and ability to execute the sub-contract

Joint Ventures and Consortiums

- A trust, consortium or joint venture (including unincorporated consortia and joint ventures), will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their consolidated B-BBEE status level Verification Certificate scorecard and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Proof of Existence: Joint Ventures and/or Subcontracting

- Bidders must submit concrete proof of the existence of joint ventures and/or subcontracting arrangements. SARS will accept signed agreements as acceptable proof of the existence of a joint venture and/or subcontracting arrangement.
- The joint venture and/or subcontracting agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or subcontracting party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or subcontracting arrangement.

B-BBEE Points

| B-BBEE Status Level of Contributor | Number of points (90/10 system) | Number of points (80/20 system) |
|---|--|--|
| 1 | 10 | 20 |
| 2 | 9 | 18 |
| 3 | 6 | 14 |
| 4* | 5 | 12 |
| 5 | 4 | 8 |
| 6 | 3 | 6 |
| 7 | 2 | 4 |
| 8 | 1 | 2 |
| Non-compliant contributor | 0 | 0 |

Bid Evaluation Process Gate 3 (Price & B-BBEE)

FINANCIALS

Financial Evaluation

Bidders are required to submit complete sets of audited or reviewed annual financial statements for the three (3) most recent financial periods in the name of the bidding entity.

The financial statement analysis will be conducted on the bidders that proceeded to Gate 3.

The annual financial statements must contain:

- Statement of Profit and Loss and Other Comprehensive Income;
- Statement of Financial Position;
- Statement of Cash Flows; and
- Accompanying Notes.

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Bidders are requested to:

- Comment on the terms and conditions set out in the Services Agreement and where necessary, make proposals to the terms and conditions;
- Each comment and/or amendment must be explained; and
- All changes and/or amendments to the Services Agreement must be in an easily identifiable colour font and tracked for ease of reference.
- SARS reserves the right to accept or reject any or all amendments or additions proposed by the successful bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

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Bid Submission

Bidders must submit copies of each file (Original and Duplicate) and a CD-ROM or USB with content of each file by the **19 October 2020 at 11:00**



TENDER BOX

SARS Brooklyn Bridge, 570 Fehrsen Street, Linton House, Brooklyn

Any enquiries must be referred, in writing via email:
tenderoffice@sars.gov.za cc rft-professionalservices@sars.gov.za
(25 September – 14 October 2020)

File 1: Original/ Duplicate

Exhibit 1

- Pre-qualification documents (SBD documents)



Exhibit 2

- Bidder Compliance Checklist – Annexure A1
- Response to Technical Requirements – Annexure A2 & A3
- Supporting documents to paragraph 9 of the RFP document



Exhibit 3

- Any supplementary/ additional information as part of technical responses
- Financial Statements



Exhibit 4

- General Conditions of Contract
- Draft Services Agreement



File 2: Original/ Duplicate

Exhibit 1

- B-BBEE Certificate
- SBD 6.1



Exhibit 2

- Pricing Schedule



NB! Each file must be marked correctly and sealed separately for easy reference during the evaluation process. CD-ROM / USB marked with Bidder Name

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