

REFERENCE: RFP 09/2016

REQUEST FOR PROPOSAL

DESCRIPTION:

**CUSTOMISATION AND IMPLEMENTATION OF SENIOR
MANAGEMENT DEVELOPMENT PROGRAMME AND
EXECUTIVE DEVELOPMENT PROGRAMME**

DATE ISSUED: 12 AUGUST 2016

CLOSING DATE: 12 SEPTEMBER 2016

TENDER BOX:

**GROUND FLOOR, LINTON HOUSE
BROOKLYN BRIDGE
570 FEHRSEN STREET
BROOKLYN, PRETORIA**

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1. INTRODUCTION

The South African Revenue Service (SARS) is uniquely placed to contribute to government's plan of action to address socio-economic growth and development, poverty alleviation and job creation. Through the vital role of providing the revenue to fund the full spectrum of initiatives, plans, programmes and strategies of national and provincial government departments, SARS plays a crucial enabling role for government delivery.

2. OVERVIEW OF SARS

Our Mandate

In terms of the South African Revenue Service Act, 1997 (Act No. 34 of 1997), SARS is mandated to:

- Collect all revenues due;
- Ensure maximum compliance with tax and customs legislation; and
- Provide a customs service that will maximise revenue collection, protect our borders and facilitate trade.

Our Vision

SARS is an innovative revenue and customs agency that enhances economic growth and social development, and that supports the country's integration into the global economy in a way that benefits all South Africans.

Our Mission

To optimise revenue yield, to facilitate trade and to enlist new tax contributors by promoting awareness of the obligation to comply with tax and customs laws, and to provide a quality, responsive service to the public.

Our Values

- Integrity
- Fairness
- Respect
- Trust
- Honesty
- Accountability

- Transparency

Our Core Outcomes

Increased Customs Compliance;

Increased Tax Compliance;

Increased ease and fairness of doing business with SARS; and

Increased cost effectiveness, internal efficiency and institutional respectability.

3. PURPOSE OF THIS REQUEST FOR PROPOSAL (RFP)

The purpose of this Request for Proposal (RFP) is to solicit proposals from Institutions/Business Schools, herewith referred to as bidders, to partner with SARS for the customisation and implementation of two (2) Executive Education Programmes.

For the purpose of this RFP, the two (2) Executive Education Programmes are referred to herein as:

- CATEGORY A – Senior Management Development Programme
- CATEGORY B – Executive Management Development Programme

This RFP document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder(s) required by SARS.

This RFP does not constitute an offer to do business with SARS, but merely serves as an invitation to Bidders to facilitate a requirements-based decision process.

4. LEGISLATION

4.1. TAX LEGISLATION

Bidder(s) must be compliant when submitting a Bid to SARS and remain compliant for the entire contract term with all applicable tax legislation, including but not limited to the Tax Administration Act, 2011 (Act No. 28 of 2011), Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).

4.2. PROCUREMENT LEGISLATION

SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act No. 1 of 1999), the Preferential Procurement Policy Framework Act, 2000 (Act No.5 of 2000) and the

Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003).

4.3. TECHNICAL LEGISLATIONS AND/OR STANDARDS

Bidder(s) should be cognisant of the following legislation and/or standards specifically applicable to the services, including but not limited to:

Acts (This list is not exhaustive.)

- 4.3.1 Adult Basic Education and Training Act, 2000 (Act No. 52 of 2000)
- 4.3.2 Further Education and Training Colleges Act, 2006 (Act No. 16 of 2006)
- 4.3.3 General and Further Education and Training Quality Assurance Act, 2001 (Act No. 58 of 2001)
- 4.3.4 Higher Education Act, 1997 (Act No. 101 of 1997)
- 4.3.5 National Qualification Methodology Act, 2008 (Act No. 67 of 2008)
- 4.3.6 Skills Development Levies Act, 1999 (Act No. 9 of 1999)
- 4.3.7 Skills Development Act, 1998 (Act No. 97 of 1998)
- 4.3.8 South African Qualifications Authority Act, 1995 (Act No. 58 of 1995)
- 4.3.9 Basic Conditions of Employment Act, 1997 (Act No. 75 of 1997)
- 4.3.10 Further Education and Training Act, 1998 (Act No. 98 of 1998)

5. BRIEFING SESSION

There is no briefing session.

6. DURATION OF CONTRACT

The successful Bidder(s) will be appointed for a period of thirty six (36) months, with an option to renew for an additional twelve (12) months at SARS's sole discretion.

7. TIMELINE OF THE BID PROCESS

The **period of validity** of tender and the withdrawal of offers, after the closing date and time is 180 days.

The project timeframes of this Bid are set out below:

Activity	Date Due
Advertisement of Bid in the Government Tender Bulletin	12 August 2016

Advertisement on e-Tender	12 August 2016
Distribution of Bid documents on SARS website	15 August 2016
Non Compulsory Briefing Session	N/A
Questions relating to the bid from bidder(s)	From 15 August to 26 August 2016
Bid Closing Date	12 September 2016 at 11H00
Notice to bidder(s)*	November/December 2016

*Dates subject to change

All times and dates in this bid are South African Standard Time.

Any time or date in this bid is subject to change at SARS's sole discretion. The establishment of a time or date in this bid does not create an obligation on the part of SARS to take any action, or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if SARS extends the deadline (the Closing Date) for bid submissions for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

8. CONTACT

A nominated official of the bidder(s) can make enquiries in writing, to the specified person, Mr Aser Makgate (Procurement Tender Office) via email at tenderoffice@sars.gov.za and cc rf-professionalservices@sars.gov.za. Bidders must reduce all telephonic enquiries to writing and send them to the above email address.

9. SCOPE OF WORK

9.1 BACKGROUND

SARS Strategic Plan 2015/16 to 2019/20 outlines the organisational strategy for the next five years. One of the key strategic shifts the organisation strives to address is people performing at their peak.

In achieving the same, SARS seeks to build a leadership and management bench strength that is capable of and is competent to embed a values based culture, take accountability and responsibility for the delivery of the SARS mandate and build a sustainable organisation.

SARS has therefore adopted a competency based approach to learning and development. The programmes in this bid are aligned to competencies that Senior Management and Executives (“delegates”) are expected to deliver. In this respect, various competency and psychometric assessment have been conducted to identify the developmental gaps that inform individual learning needs. Delegates will be advised to share their relevant assessments reports/surveys with the successful bidder for development purposes.

The following assessments and surveys are administered by SARS:

- Emotional Intelligence (EQI)
- Meyers Briggs Type Indicator (MBTI)
- Occupational Personality Questionnaire (OPQ)
- Modified Career Path Appreciation (MCPA)
- 360 Leadership Effectiveness
- Assessment centre (simulations)

9.2 SCOPE OF SERVICES

Bidders may submit proposals on either one or both programmes in respect of the following Categories:

9.2.1 CATEGORY A: SENIOR MANAGEMENT DEVELOPMENT PROGRAMME

SARS seeks to partner with a prospective bidder for the customisation and implementation of a Senior Management Development Programme. The successful bidder will be required to align and customise up to a maximum of 20% of the content of an existing NQF aligned/credit-bearing executive education programme to the SARS strategic context.

Senior Managers in the SARS context refers to leaders who are at the Tactical Development/Implementation level of work. Roles in this category execute and deliver on approved plans where other leaders have provided the strategy.

The successful bidder will be required to:

9.2.1.1 Customisation

9.2.1.1.1 Partner with SARS in customising an existing Senior Management Development Programme and aligning the programme to the competency requirements within the Tactical Level.

- 9.2.1.1.2 Structure and align the learning materials into four (4) major themes as outlined below:

Theme 1: Personal Mastery

The degree to which leaders are able to gain insight into themselves and impact those they lead. The modules within the Personal Mastery theme are as follows:

- Leadership and Personal Mastery
- Leading with Emotional Intelligence
- Coaching Circles

Theme 2: Team Mastery

The degree to which leaders are able to understand teams and create a high performance environment. The modules within Team Mastery theme are as follows:

- Leading Teams for Impact
- Coaching for Optimal Performance
- Performance and Talent Management

Theme 3: Business Mastery

The degree to which leaders understand business management concepts and how to integrate and apply them in their day to day activities. The modules within the Business Mastery theme are as follows:

- Innovation for Business Success
- Financial Management
- Organisational Effectiveness
- Building sustainability

Theme 4: Strategic Mastery

The degree to which leaders are able to think broadly, see many aspects and understand the underlying patterns of the entire system. The modules within Strategic Mastery theme are as follows:

- The Global Environment
- Strategy Formulation to Implementation
- Strategic Customer Relationship Management

- 9.2.1.1.3 Ensure that the programme is credit-bearing/aligned with the National Qualifications Framework (NQF) level 7.
- 9.2.1.1.4 Ensure that the programmes are aligned to the principles of Adult Learning (70:20:10).

- 9.2.1.1.5 Provide the criteria that will be used to evaluate the learning outcomes of the programme (formative and summative).
- 9.2.1.1.6 Ensure quality assurance and sign-off of all materials developed.
- 9.2.1.1.7 Post award of tender, ensure that within ten (10) weeks the programme is ready for implementation.

- 9.2.1.2 **Structure and duration**
 - 9.2.1.2.1 Structure and align the programme to the four (4) themes and run them on a four (4) block-release basis over a period of eight (8) to ten (10) months.
 - 9.2.1.2.2 The expected commencement date of the programme is February/March every year.

- 9.2.1.3 **Administration of the programme**
 - 9.2.1.3.1 Provide an orientation launch for the academic year which will include programme objectives, outcomes, criteria, method of evaluation and relevant information to the nominated SARS delegates.
 - 9.2.1.3.2 Provide resource plans for the full duration of the programme.
 - 9.2.1.3.3 Enrol and register delegates as nominated by SARS in cohorts of 20. The estimated delegates for enrolment are 60 in 2017, 80 in 2018 and 80 in 2019.
 - 9.2.1.3.4 Utilise relevant data as administered by SARS to inform the individual developmental needs.
 - 9.2.1.3.5 Coordinate and manage the interface between SARS delegates and the bidder.
 - 9.2.1.3.6 Make provisions for SARS Leadership to attend the simulations/presentations (summative assessments) made by delegates to provide feedback.

- 9.2.1.4 **Learning Resources**
 - 9.2.1.4.1 Provide the learning material to SARS delegates.
 - 9.2.1.4.2 Provide access to other learning resources such as libraries and knowledge hubs.

- 9.2.1.5 **Venue**
 - Provide the venue at the bidder's location.

- 9.2.1.6 **Reporting**
 - 9.2.1.6.1 Compile and submit progress reports per block-release.
 - 9.2.1.6.2 Inform SARS on the conduct of delegates that impacts the delivery of the programme or the contractual agreement.

- 9.2.1.7 **NQF alignment Programme Certification**

- 9.2.1.7.1 Align the programme with National Qualification Framework (NQF) Level 7.
- 9.2.1.7.2 Provide guidance for delegates to optimise their development.
- 9.2.1.7.3 Award a certificate of competence to delegates on successful completion of the programme as a graduation.

9.2.2 CATEGORY B: EXECUTIVE DEVELOPMENT PROGRAMME

SARS seeks to partner with a prospective bidder for the customisation and implementation of an Executive Development Programme. The successful bidder will be required to have up to 20% alignment and customisation to SARS strategic context on an existing NQF aligned accredited/credit-bearing executive education programme.

An executive in the SARS context refers to leaders who operate at the Strategy Enablement/Implementation level of work. Roles in this category implement strategy for a part of the organisation.

The successful bidder will be required to:

9.2.2.1 Customisation

- 9.2.2.1.1 Partner with SARS in customising an existing Executive Development Programme and aligning the programme to the competency requirements.
- 9.2.2.1.2 Structure and align the learning materials into four (4) major themes as outlined below:

Theme 1: Personal Mastery

The degree to which leaders are able to gain insight into themselves and impact those they lead. The modules within the Personal Mastery theme are as follows:

- Executive Coaching
- Focused Talent Mentoring
- Authentic Leadership

Theme 2: Team Mastery

The degree to which leaders are able to understand teams and create a high performance environment. The modules within Team Mastery theme are as follows:

- Leadership for Organisational Excellence
- Optimisation of Team Talent and Employee Value Proposition
- Influencing High Performance Culture

Theme 3: Business Mastery

The degree to which leaders understand business management concepts and how to integrate and apply them in their day to day activities. The modules within the Business Mastery theme are as follows:

- The Global Business & Financial Environment
- Change & Transformation Management
- Project Management
- Integration of e-Business & Technology Management
- Corporate Governance
- Quality Management

Theme 4: Strategic Mastery

The degree to which leaders are able to think broadly, see many aspects and understand the underlying patterns of the entire system. The modules within Strategic Mastery theme are as follows:

- Strategic Management
- Strategic Financial Management
- Strategic Dynamics and Global Business

9.2.2.1.3 Ensure that the programme is credit-bearing/aligned with the National Qualifications Framework (NQF) level 8.

9.2.2.1.4 Ensure that the programmes are aligned to the principles of Adult Learning (70:20:10).

9.2.2.1.5 Provide criteria that will be used to evaluate the learning outcomes of the programme (formative and summative).

9.2.2.1.6 Ensure quality assurance and sign-off of all materials developed.

9.2.2.1.7 Post award of tender, ensure that within ten (10) weeks the programme is ready for implementation.

9.2.2.2 **Structure and duration**

9.2.2.2.1 Structure and align the programme to the four (4) themes and run them on a four (4) block-release basis over a period of eight (8) to ten (10) months.

9.2.2.2.2 The expected commencement date of the programme is February/March for each year that the project runs.

9.2.2.3 **Administration of the programme**

9.2.2.3.1 Provide an orientation launch for the academic year which will include programme objectives, outcomes, criteria, method of evaluation and relevant information to the nominated SARS delegates.

9.2.2.3.2 Provide resource plans for the full duration of the programme.

- 9.2.2.3.3 Enrol and register delegates as nominated by SARS in cohorts of 20. The estimated delegates for enrolment are 20 in 2017, 40 in 2018 and 40 in 2019.
- 9.2.2.3.4 Utilise the relevant data as administered by SARS to inform the developmental needs per delegate.
- 9.2.2.3.5 Coordinate and manage the interface between SARS delegates and the bidder.
- 9.2.2.3.6 Make provisions for SARS Leadership to attend the simulations/presentations (summative assessments) made by delegates to provide feedback.

- 9.2.2.4 **Learning Resources**
 - 9.2.2.4.1 Provide the learning material to SARS delegates.
 - 9.2.2.4.2 Provide access to other learning resources such as libraries and knowledge hubs.

- 9.2.2.5 **Venue**

Provide the venue at the Bidder's location.

- 9.2.2.6 **Reporting**
 - 9.2.2.6.1 Compile and submit progress reports per block-release.
 - 9.2.2.6.2 Inform SARS on the conduct of delegates that impacts the delivery of the programme or the contractual agreement.

- 9.2.2.7 **NQF alignment Programme Certification**
 - 9.2.2.7.1 Align the programme with National Qualification Framework (NQF) Level 8.
 - 9.2.2.7.2 Provide guidance for delegates to optimise their development.
 - 9.2.2.7.3 Award a certificate of competence to delegates on successful completion of the programme as a graduation.

9.3 DOCUMENTATIONS REQUIRED

Bidders are required to submit all the required information for each category they are tendering for. Each category will be evaluated independent of each other and it is therefore important that Bidders submit all the required information separately should they be submitting proposals in one (1) or both programmes.

Bidders must refer to the following Annexures in their response to the documentation required for each category:

- ANNEXURE A1: Technical Evaluation Scorecard for CATEGORY A – Senior Management Development Programme and,
- ANNEXURE A2: Technical Evaluation Scorecard for CATEGORY B – Executive

9.3.1 BIDDERS PROPOSAL FOR CATEGORY A – SENIOR MANAGEMENT DEVELOPMENT PROGRAMME

Bidders are required to submit their response to all the information in this section relating to the Senior Management Development Programme.

- 9.3.1.1 Bidder's profile in rendering customised programmes, organisational structure and infrastructure to render the services. The profile must include but should not be limited to: staff compliment (including lecturers and Course Convener) for the programme; Level of expertise of key personnel who will be customising the programme (their accessibility, qualifications and experience and full contact details of the key contact person / Accounts Manager.
- 9.3.1.2 A comprehensive programme outline of the bidder's existing programme that will be customised for Senior Management Development Programme. The information provided must include but not limited to: Programme overview, Entry requirements, Key focus areas, Module objectives, Learning outcomes, Duration of the programme, Venue for contact learning, NQF alignment, Credits (where applicable) and Certificate.
- 9.3.1.3 Clearly demonstrate on how the bidder's Senior Management Development Programme course content can be customised and aligned to SARS's key focus areas as outlined in paragraph 9.2.1.1. Bidders must also clearly outline any shortfall on their programme course content that may require customisation to align to SARS's four (4) themes.
- 9.3.1.4 Propose a high-level project plan with clearly defined deliverables and timelines for the customisation and implementation of the Senior Management Development Programme. The plan must make provision for quality management of the programme. Bidders must take into account all SARS's key requirements as outlined in paragraph 9.2.1.
- 9.3.1.5 Provide three (3) testimonial letters from current/recent clients, (not older than 5 years) to whom customisation of executive education programmes were rendered. The reference letter must be on a company letter head and include the following: company name, contact name, address, phone number, and duration of contract, a brief description of the services and the level of customer satisfaction.

9.3.2 BIDDERS PROPOSAL FOR CATEGORY B – EXECUTIVE DEVELOPMENT PROGRAMME

Bidders are required to submit their response to all the information in this section for the Executive Development Programme.

- 9.3.2.1 Bidder's profile in rendering customised Executive Education programmes, organisational structure and infrastructure to render the services. The profile must also include but should not be limited to: staff compliment (including lecturers and Course Convener) for the programme; Level of expertise of key personnel who will be customising the programme (their accessibility, qualifications and experience and full contact details of the key contact person / Accounts Manager
- 9.3.2.2 A comprehensive programme outline of the Bidder's existing programme that will be customised for Executive Development Programme. The information provided must include but not be limited to: Programme overview, Entry requirements, Key focus areas, Module objectives, Learning outcomes, Duration of the programme, Venue for contact learning, NQF alignment, Credits (where applicable) and Certificate.
- 9.3.2.3 Clearly demonstrate on how the Bidder's Executive Development Programme course content can be customised and aligned to SARS's key focus areas as outlined in paragraph 9.2.2.1. Bidders must also clearly outline any shortfall on their programme course content that may require customisation to align to SARS's four (4) themes.
- 9.3.2.4 Propose a high-level project plan with clearly defined deliverables and timelines for the customisation and implementation of the Executive Development Programme. The plan must make provision for quality management of the programme. Bidders must take into account all SARS's key requirements as outlined in paragraph 9.2.2.
- 9.3.2.5 Provide three (3) testimonial letters from current/recent clients, (not older than 5 years) to whom customisation of executive education programmes were rendered. The reference letter must be on a company letter head and include the following: company name, contact name, address, phone number, and duration of contract, a brief description of the services and the level of customer satisfaction.

9.4 CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

Service providers and suppliers who wish to render services to SARS will no longer register at SARS directly. Suppliers will have to register on National Treasury Central Supplier Database (CSD) as per National Circular No 3 of 2015/6 – Central Supplier Database; National Treasury will maintain the database for all suppliers for Government and its institutions; and All existing and prospective suppliers are requested to register on the CSD by accessing the National Treasury website at www.CSD.gov.za.

10. INSTRUCTIONS TO BIDDER(S)

Bids must be properly packaged and deposited in the below mentioned tender box on or before the Closing Date and before the closing time at the SARS Tender Office situated at:
Linton House - Ground Floor
Brooklyn Bridge
570 Fehrsen Street
Brooklyn, Pretoria

Bid documents may also be posted to the Tender Office - SARS Procurement Department, Linton House, Brooklyn Bridge, 570 Fehrsen Street, Brooklyn, Pretoria, 0181.

Bid documents will only be considered if received by SARS before the closing date and time, regardless of the method used to send or deliver such documents to SARS.

Late bids will not be accepted and shall be returned to bidder(s).

The bidder(s) are required to submit two (2) copies of each file (original and duplicate) and one (1) CD-ROM with the contents of each file by **12 September 2016 at 11H00**.

Each file and CD-ROM must be **marked correctly and sealed separately** for ease of reference during the evaluation process. Pricing Information should not be included in the Technical file. Furthermore, the file and information in the CD-ROM must be labelled and submitted in the following format:

DOCUMENTATION REQUIRED FOR CATEGORY A – SENIOR MANAGEMENT DEVELOPMENT PROGRAMME

FILE 1A

Exhibit 1

- Pre-qualification documents (SBD Documents)

Exhibit 2

- Bidder's technical response to paragraph 9.3.1 (**Annexure A1**)
- Supporting documents for technical responses
- Testimonial letters

Exhibit 3

- Bidder's profile
- Supplementary information

Exhibit 4

- General Conditions of Contract (GCC)
- Draft Service Agreement

FILE 2A

Exhibit 5

- B-BBEE Certificate (copy of the recent and valid)
- Pricing Schedule

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

DOCUMENTATION REQUIRED FOR CATEGORY B – EXECUTIVE DEVELOPMENT PROGRAMME

FILE 1B

Exhibit 1

- Pre-qualification documents (SBD Documents)

Exhibit 2

- Bidder's technical response to paragraph 9.3.2 (**Annexure A2**)
- Supporting documents for technical responses
- References

Exhibit 3

- Bidder's profile
- Supplementary information

Exhibit 4

- General Conditions of Contract (GCC)
- Draft Service Agreement

FILE 2B

Exhibit 5

- B-BBEE Certificate (copy of the recent and valid)
- Pricing Schedule

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

10.1. SARS REQUIRES BIDDER(S) TO DECLARE

In the Bidder's Technical Response, bidder(s) are required to declare the following:

- a. List the names of key individuals i.e. representative of the bidder(s) that will act on behalf of the bidder(s) if successful in this Bid.
- b. Confirm that the bidder(s) is to:
 - i. Act honestly, fairly and with due skill, care and diligence, in the interests of SARS;
 - ii. Have and employ effectively the resources, procedures and appropriate technological systems for the proper performance of the Services;
 - iii. Act with circumspection and treat SARS fairly in a situation of conflicting interests;
 - iv. Comply with all applicable statutory or common law requirements applicable to the conduct of business;
 - v. Make adequate disclosures of relevant material information, including disclosures of actual or potential own interests, in relation to dealings with SARS;
 - vi. Avoid fraudulent and misleading advertising, canvassing and marketing;
 - vii. Conduct their business activities with transparency and consistently uphold the interests and needs of SARS as a client before any other consideration; and
 - viii. Ensure that any information acquired by the bidder(s) from SARS will not be used or disclosed unless the written consent of SARS has been obtained to do so.

11. EVALUATION AND SELECTION CRITERIA

SARS has set minimum standards (Gates) that a bidder(s) needs to meet in order to be evaluated and selected as a successful bidder(s).

The minimum standards consist of the following:

- a. **Pre-Qualification Criteria (Gate 0)** – bidder(s) must submit all documents, as outlined in paragraph 11.1 below.
- b. **Technical Evaluation Criteria (Gate 1)** – bidders will be evaluated out of 100 points and must achieve a minimum threshold of 70 points.
- c. **Price and BBEE Evaluation (Gate 2)** – This will be evaluated out of 100 points. Price will be evaluated out of 90 points and BBEE out of 10 points. Price should be inclusive of all direct and indirect costs.

11.1. PRE-QUALIFICATION CRITERIA – GATE 0

Without limiting the generality of SARS's other critical requirements for this bid, a bidder(s) must submit the documents listed in **Table 11A** below. All documents must be completed and signed by the duly authorised representative of the prospective bidder(s). A bidder's proposal may be disqualified for non-submission of any of the documents.

Table 11A: Documents that must be submitted for Pre-qualification

Name of the document that must be submitted	Non-submission may result in disqualification
Central Registration Report (Central Database System) from National Treasury	YES – Bidders must register on Central Database System and submit the Report as confirmation of registration.
SARS' s Oath of Secrecy	YES – complete and sign the supplied pro forma document in the presence of a Commissioner of Oaths and initial every page.
Invitation to Bid – SBD 1	YES – complete and sign the supplied pro forma document.
Pricing Schedule	YES – submit full details of the pricing proposal to SARS in Annexure C.
Declaration of Interest – SBD 4	YES – complete and sign the supplied pro forma document.
Preference Point Claim Form - SBD 6.1	NO – Non-submission will lead to a zero score on BBEE.
General Conditions of Contract (GCC)	YES – sign the supplied GCC form.
Declaration of Bidder's Past Supply Chain Management Practices – SBD 8	YES – complete and sign the supplied pro forma document.
Certificate of Independent Bid Determination – SBD 9	YES – complete and sign the supplied pro forma document.
Bidder Compliance Checklist Form for Technical	NO – Complete to assist with ease of

Name of the document that must be submitted	Non-submission may result in disqualification
Evaluation (Annexure B)	reference during evaluation.
Mandatory Requirement Accreditation with South African Council on Higher Education (CHE) or other recognised accreditation bodies.	NO – However, SARS will verify the accreditation of each Bidder with the respective accreditation bodies. SARS reserves the right to request additional information from Bidders to validate accreditation.

11.2. TECHNICAL EVALUATION (GATE 1) = 100 POINTS

Only Bidder(s) that have met the Pre-Qualification Criteria in (Gate 0) will be evaluated in Gate 1 for functionality.

Bidders will be evaluated out of 100 points and are required to achieve the minimum threshold of 70 out of 100 points.

Only Bidders that have obtained a threshold of 70 out of 100 points will proceed to Gate 2 for Price and BEE evaluations.

SARS reserves the right to invite Bidders for presentation for technical clarification.

11.3. PRICE AND BBBEE EVALUATION (GATE 2) (90 + 10) = 100 POINTS

11.3.1. Stage 1 – Price Evaluation (90 points)

Adjudication Criteria	Points
Price Evaluation $P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	90

Where

P_s = Points scored for price of Bid under consideration

P_t = Rand value of Bid under consideration

Pmin = Rand value of lowest acceptable Bid

11.3.2. Stage 2 – BBBEE Evaluation (10 points)

a. B-BBEE Requirements

In line with the requirements of the Preferential Procurement Regulations, 2011 (*Government Gazette* No. 34350) to the Preferential Procurement Policy Methodology Act, 2000 (Act No. 5 of 2000) [the “PPPFA”] tenders that have achieved the minimum qualifying score for functionality will be evaluated further in terms of the prescribed preference point systems:

- (i) Regulation 5 - 80/20: A maximum of 20 points may be allocated to a Bidder; or
- (ii) Regulation 6 - 90/10: A maximum of 10 points may be allocated to a Bidder.

b. Bid Evaluation Process Gate 2: B-BBEE EVALUATION

B-BBEE points may be allocated to bidders on submission of the following documentation or evidence:

- A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1); and
- B-BBEE Certificate.

The checklist below indicates the B-BBEE documents that must be submitted for this tender. Failure to submit the required documents will result in bidders scoring zero for B-BBEE.

Classification	Turnover	Submission Requirement
Exempted Micro Enterprise (EME)	Below R10 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS accredited rating agency or a Registered Auditor approved by IRBA or a letter from an Accounting Officer as contemplated in the CCA.
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 Registered Auditor approved by IRBA.

Large (LE)	Enterprise	Above R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS accredited rating agency or a Registered Auditor approved by IRBA.
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SARS will accept B-BBEE Certificates issued under the revised B-BBEE Codes.

Use and acceptance of Sworn Affidavits

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

Joint Ventures (JVs) and Consortiums

Incorporated JVs must submit the B-BBEE status of the entity. Unincorporated JVs must submit a consolidated B-BBEE scorecard as if they were a group structure for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures and/or sub-contracting arrangements. SARS will accept signed agreements as acceptable proof of the existence of a joint venture and/or sub-contracting arrangement.

The joint venture and/or sub-contracting agreements must clearly set out the roles and responsibilities of the lead partner and the joint venture and/or sub-contracting 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 sub-contracting arrangement.

11.3.3. Stage 3 (90 + 10 = 100 points)

The Price and BBBEE points will be consolidated to determine the successful Bidder.

12. AGREEMENTS

12.1. GENERAL CONDITIONS OF CONTRACT

Any award made to a bidder under this bid is conditional, amongst others, upon –

- a. The bidder accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which SARS is prepared to enter into a contract with the successful bidder.

- b. The bidder submitting the General Conditions of Contract to SARS together with its bid, duly signed by an authorised representative of the bidder.

12.2. SPECIAL CONDITIONS OF THIS BID

SARS reserves the right:

- a. Not to award or cancel this bid at any time and shall not be bound to accept the lowest or any bid.
- b. To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other bidder(s) who has not been awarded the status of the preferred bidder(s).
- c. To accept part of a bid rather than the whole bid.
- d. To cancel and/or terminate the bid process at any stage, including after the Closing Date and/or after presentations have been made, and/or after Bids have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.
- e. To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the bid.
- f. To correct any mistakes at any stage of the bid that may have been in the bid documents or occurred at any stage of the bid process.

12.3. SERVICES AGREEMENT

- a. Upon award, SARS and the successful bidder will conclude a supplementary agreement regulating the specific terms and conditions applicable to the services being procured by SARS, more or less in the format of the draft Services Agreement included in this tender pack.
- b. SARS reserves the right to vary the proposed terms and conditions of the draft Services Agreement during the course of negotiations with a bidder by amending or adding thereto (including for purposes of better giving effect to the objectives in paragraph 2 above).
- c. 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.
- d. SARS reserves the right to accept or reject any or all amendments or additions proposed by a bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

12.4. CONFLICT OF INTEREST, CORRUPTION AND FRAUD

SARS reserves its right to disqualify any bidder who either through itself or any of its members (save for such members who hold a minority interest in the bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a fifteen per cent (15%) interest in the bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of SARS or any other government organ or entity and whether from the Republic of South Africa or otherwise ("Government Entity"):

- a. engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this bid;
- b. seeks any assistance, other than assistance officially provided by a Government Entity, from any employee, advisor or other representative of a Government Entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- c. makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of SARS's officers, directors, employees, advisors or other representatives;
- d. makes or offers any gift, gratuity, anything of any value or other inducement, to any Government Entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- e. accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a Government Entity;
- f. pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, that is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a Government Entity;
- g. has in the past engaged in any matter referred to above; or
- h. has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such bidder, member or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.

12.5. MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT

The Bidder should note that the terms of its bid will be incorporated in the proposed contract

by reference and that SARS relies upon the bidder's bid as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder.

It follows therefore that misrepresentations in a bid may give rise to service termination and a claim by SARS against the bidder notwithstanding the conclusion of the Services Agreement between SARS and the bidder for the provision of the services in question.

12.6. PREPARATION COSTS

The bidder will bear all its costs in preparing, submitting and presenting any response or tender to this bid and all other costs incurred by it throughout the bid process. Furthermore, no statement in this bid will be construed as placing SARS, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidders in the preparation of their response to this bid.

12.7. INDEMNITY

If a bidder breaches the conditions of this bid and, as a result of that breach, SARS incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds SARS harmless from any and all such costs which SARS may incur and for any damages or losses SARS may suffer.

12.8. PRECEDENCE

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

12.9. LIMITATION OF LIABILITY

A bidder participates in this bid process entirely at its own risk and cost. SARS shall not be liable to compensate a bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the bidder's participation in this bid process.

12.10. TAX COMPLIANCE

No tender shall be awarded to a bidder who is not tax compliant. SARS reserves the right to withdraw an award made, or cancel a contract concluded with a successful bidder in the event that it is established that such bidder was in fact not tax compliant at the time of the award, or has submitted a fraudulent Tax Clearance Certificate (TCC) to SARS. SARS

further reserves the right to cancel a contract with a successful bidder in the event that such bidder does not remain tax compliant for the full term of the contract. The bidder will be required to submit a new TCC upon expiry of the TCC previously submitted.

12.11.NATIONAL TREASURY

No tender shall be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appear on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. SARS reserves the right to withdraw an award, or cancel a contract concluded with a bidder should it be established, at any time, that a bidder has been blacklisted with National Treasury by another government institution.

12.12.GOVERNING LAW

South African law governs this bid and the bid response process. The bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any kind that may arise out of or in connection with the subject matter of this bid, the bid itself and all processes associated with the bid.

12.13.RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL

A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this bid and in particular the provisions of paragraph 11.3.2 above. In the event that SARS allows a bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the bidder and SARS will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.

12.14.CONFIDENTIALITY

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this bid or a bidder's bid proposal(s) will be disclosed by any bidder or other person not officially involved with SARS's examination and evaluation of a bid.

No part of the bid may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a bid. This bid and any other documents supplied by SARS remain proprietary to SARS and must be promptly returned to SARS upon request together with all



copies, electronic versions, excerpts or summaries thereof or work derived there from.

Throughout this bid process and thereafter, bidders must secure SARS's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this bid relates; or (ii) the process which follows this bid. Failure to adhere to this requirement may result in disqualification from the bid process and civil action.

No confidential information relating to the process of evaluating or adjudicating bids or appointing a bidder will be disclosed to a bidder or any other person not officially involved with such process.

12.15.SARS PROPRIETARY INFORMATION

Bidder will on their bid covering letter make declaration that they did not have access to any SARS proprietary information or any other matter that may have unfairly placed that bidder in a preferential position in relation to any of the other bidders.

13. TECHNICAL EVALUATION CRITERIA

13.1. COMPLIANCE CHECKLIST

Bidders must complete the technical evaluations compliance checklist as outlined in Annexure B.

13.2. ANNEXURE A1

CATEGORY A – SENIOR MANAGEMENT DEVELOPMENT PROGRAMME – 100 points

#	Technical Evaluation Criterion	Weight	RFP Doc. Reference
1	Profile, Resources & Infrastructure	20	
1.1	Provide the Bidder's profile, organisational structure and infrastructure to render the services. The profile must also include but not limited to: staff compliment (including lecturers and Course Convener) for the programme; Level of expertise of key personnel who will be customising the programme (their accessibility, qualifications and experience and full contact details of the key contact person / Accounts Manager.		Refer to Section 9.3.1.1
2	Capability	35	
	The bidder has provided a comprehensive programme outline of the Bidder's customisable open programme for Senior Management Development Programme. The information provided must include but not be limited to: Programme overview, Entry requirements, Key focus areas, Module objectives, Learning outcomes, Duration of the programme, Venue for contact learning, NQF alignment, Credits (where applicable) and Certificate.		Refer to Section 9.3.1.2
3	Methodology and Approach	30	
3.1	The Bidder has demonstrated on how Senior Management Development Programme course content can be customised and aligned to SARS's key focus areas as outlined in paragraph 9.2.1.1. Bidder has also clearly outlined any shortfall on their programme course content that may require customisation to align to SARS's four (4) themes.		Refer to Section 9.3.1.3
3.2	The Bidder has provided a high-level project plan with clearly defined deliverables and timelines for the customisation and implementation of the Senior Management Development Programme.		Refer to Section 9.3.1.4
4	Reference	15	
4.1	The Bidder has provided the testimonial letters from three (3) contactable current/recent (within the past 5 years) clients to whom similar services are provided and whom		Refer to Section 9.3.1.5

#	Technical Evaluation Criterion	Weight	RFP Doc. Reference
	SARS may contact for reference check. The reference letters must be on the company letter heads and include: company name, contact name, address, phone number, and duration of contract, a brief description of the services rendered and the level of satisfaction of your service offering.		

13.3. ANNEXURE A2

CATEGORY B – EXECUTIVE DEVELOPMENT PROGRAMME – 100 points

#	Technical Evaluation Criterion	Weight	RFP Doc. Reference
1	Profile, Resources & Infrastructure	25	
1.1	Provide the Bidder's, organisational structure and infrastructure to render the services. The profile must also include but not be limited to: staff compliment (including lecturers and Course Convener) for the programme; Level of expertise of key personnel who will be customising the programme (their accessibility, qualifications and experience and full contact details of the key contact person / Accounts Manager.		Refer to Section 9.3.2.1
2	Capability	35	
	The bidder has provided a comprehensive programme outline of the Bidder's customisable open programme for Executive Development Programme. The information provided must include but not be limited to: Programme overview, Entry requirements, Key focus areas, Module objectives, Learning outcomes, Duration of the programme, Venue for contact learning, NQF alignment, Credits (where applicable) and Certificate.		Refer to Section 9.3.2.2
3	Methodology and Approach	30	
3.1	The Bidder has demonstrated on how Executive Development Programme course content can be customised and aligned to SARS's key focus areas as outlined in paragraph 9.2.2.1. Bidder has also clearly outlined any shortfall on their programme course content that may require customisation to align to SARS's four (4) themes.		Refer to Section 9.3.2.3
3.2	The Bidder has provided a high-level project plan with clearly defined deliverables and timelines for the customisation and implementation of the Executive Development Programme.		Refer to Section 9.3.2.4
4	Reference	15	
4.1	The Bidder has provided the testimonial letters from three (3) contactable current/recent (within the past 5 years) clients to who similar services were provided and whom SARS may contact for reference check. The reference		Refer to Section 9.3.2.5

#	Technical Evaluation Criterion	Weight	RFP Doc. Reference
	letters must be on the company letter heads and include: company name, contact name, address, phone number, and duration of contract, a brief description of the services rendered and the level of satisfaction of your service offering.		

14. ANNEXURE C – PRICING SCHEDULE

Bidders to refer to the following pricing schedules:

- **Annexure C1 - Category A** – Senior Management Development Programme; and/or
- **Annexure C2 - Category B** – Executive Management Development Programme