

Appointment of a service provider for the provision of the Employee Engagement survey for SARS

Briefing Session	06 October 2015 14h00
RFP No	RFP 15/2015
Closing Date	26 October 2015, 11h00

Bid Evaluation Committee

Procurement

Commodity Leader: Professional Services – Project Oversight

Price Evaluator

BBBEE Evaluator

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Pre-Qualification

SARS HR – Employee Engagement

Senior HR Specialist – Technical Evaluator

HR Specialist – Technical Evaluator

Specialist: HR Systems – Technical Evaluator

Price Evaluator

Corporate Legal Services

Legal Specialist

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RFP Timelines

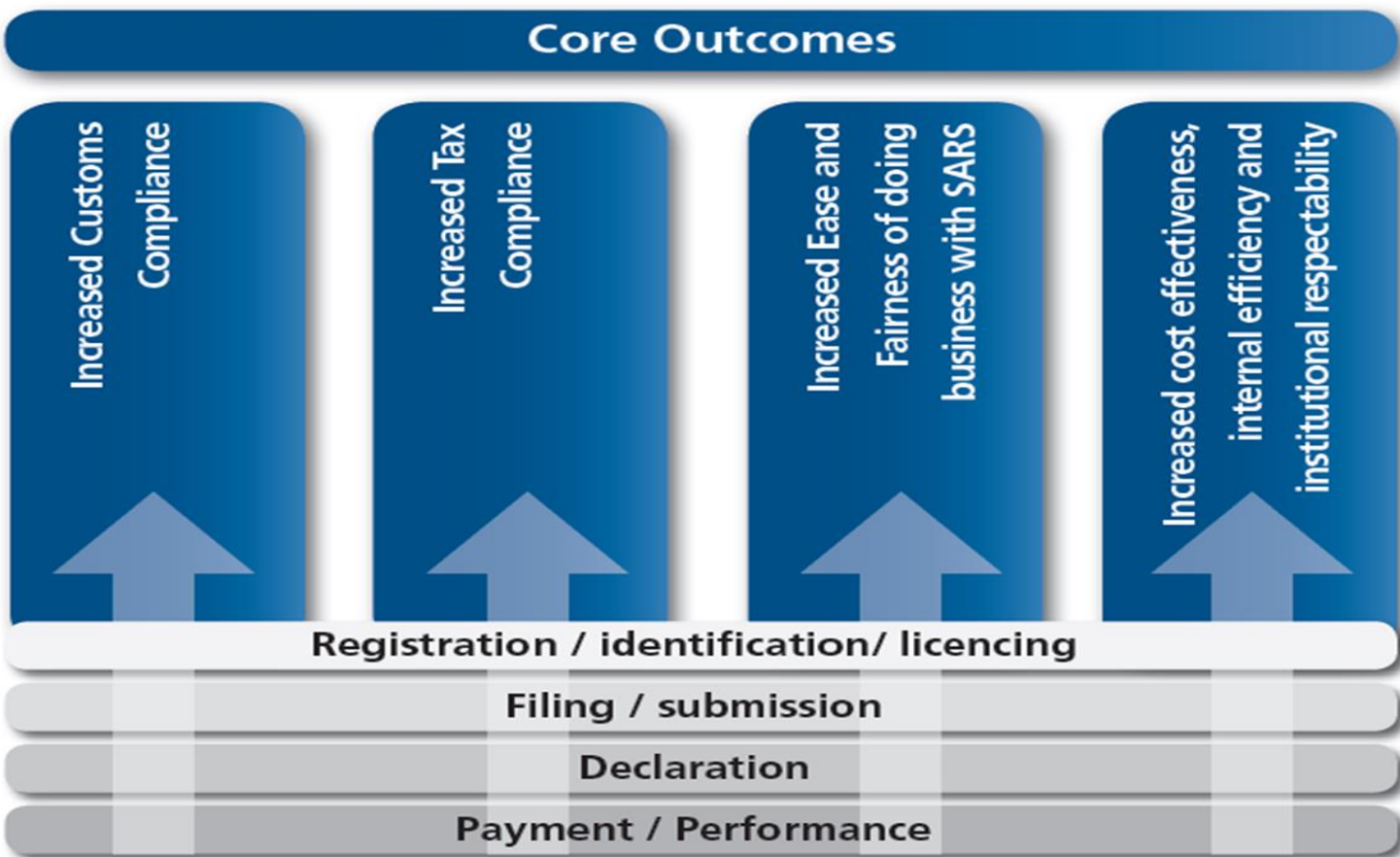
ACTIVITY	DUE DATE
RFP Advertisement in Sunday Times	27 September 2015
RFP Advertisement in Government Tender Bulletin	25 September 2015
Tender documents on SARS website	28 September 2015
Non-Compulsory briefing session	06 October 2015, 14H00
Questions relating to RFP	20 October 2015
RFP Closing Date	26 October 2015, 11h00
Notice to bidders	December 2015

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Background

As an organ of state, SARS's mandate outlines its obligations towards the state and its people by:



Background Cont....

The employee engagement survey enables the organisation to assess levels of employee engagement and ultimately develop interventions to help each employee feel valued, recognised and worthy. The level of employee engagement i.e. engagement score, tells SARS how motivated, fulfilled and committed its employees are.

The objective is to provide SARS employees the opportunity to rate their organisational work experience and share ideas through an online survey administered by an independent external service provider.

SARS has years of data, trends and analysis from previous engagement reports. The available information will be shared with the successful service provider as a baseline.

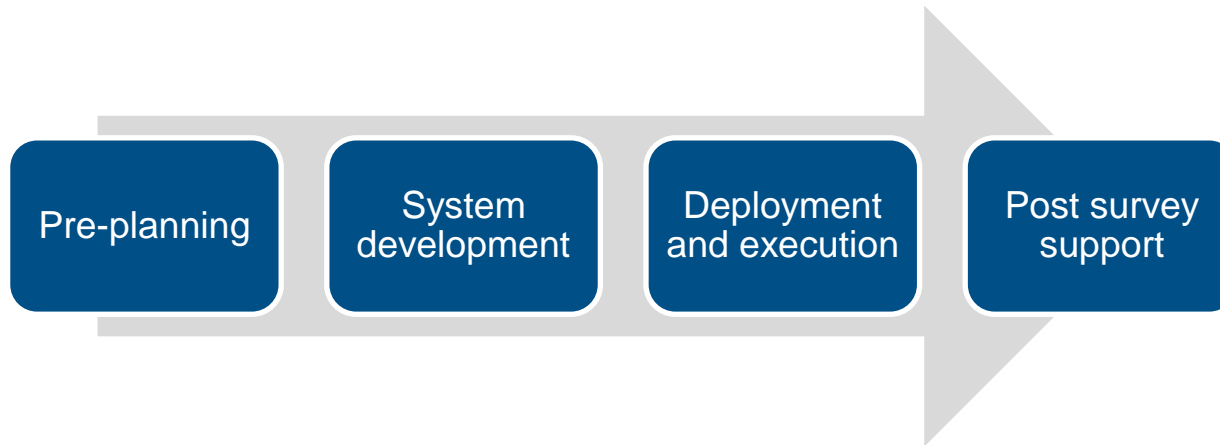
SARS will provide the successful bidder with the following:

- a. Questionnaire in excel format
- b. Organisational structure
- c. Previous years engagement surveys results

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SARS seeks to appoint an external service provider to administer a secure, stable and easy to use web-based survey.



- Project support
- Survey Planning
- Functionality System Requirements (Communication)
- Data analysis and Reporting
- Survey Results Presentation and Action Planning
- Project timelines
- Survey administration
- Architectural guidelines
- IT Compatibility

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Bid Evaluation Process

Gate 0

Pre-Qualification

- Tax Clearance Certificate SBD 2
- Invitation to Bid SBD 1
- Response to Bid Letter
- GCC
- SARS Oath 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
- Service Provider Compliance Form for Technical Evaluation
- Audited/Reviewed Annual Financial Statements for three reporting periods

Gate 1

Desktop Technical Analysis

70 points

Presentation, System
Demonstration &
Reference Check

30 points

Achieve 49 of 70
points
Overall score of 70
out of 100 points to
proceed to Gate 2

- Project Support – Experience of the service provider
- Survey planning; Functionality System Requirements
- Survey Administration and IT Infrastructure;
- Data Analysis, Reports, Presentation and Action Planning
- Project management

Annexure A,

Gate 2

BBBEE

10 points

Price

90 points

- BBBEE certificate
- Pricing Schedule – Annexure B

Annexure B
(Pricing Schedule)

Technical Requirements

Bidders are required to complete Annexure A2 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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Pricing Evaluation

ANNEXURE B: PRICING SCHEDULE

BIDDER'S NAME:

RFP NUMBER:

RFP 15/2015

Bidders must carefully read the NOTES before completing this SCHEDULE

NOTES :

1. Bidders price offer must be firm for the duration of the contract. SARS will under no circumstance consider price escalations once the contract has been awarded.
2. Bidders must note that the appointment will be for a period of six (6) years for the delivery of three (3) Employee Engagement Surveys.
3. Bidders must complete grey-shaded cells **ONLY**. The schedule contains formulas that automatically calculate total costs inclusive of VAT.
4. Bidders must make reference to the RFP document for any information necessary for the completion of the pricing schedule.
5. Bidders must submit pricing schedules in EXCEL format (on a CD-ROM or USB device) as well as a signed hardcopy print out included in the tender file.
6. The pricing schedule has been locked. Bidders are required to input prices in the grey shaded cells. Bidders may not make any changes to this pricing schedule. Failure to comply will render your price offer non-responsive.
7. Bidders must note that failure to complete and comply this price schedule and the notes **as provided** may render your bid or price offer non-responsive.
8. All rates are subjects to negotiation prior to signing and during the life cycle of the Contract when necessary
9. The prices **MUST** be all inclusive. This means, All direct and indirect related costs must be include in the proposal. No additional costs will be considered post award.
10. Payment will be done per deliverable per survey

Survey Planning, Design and Development	Resources- Indicate Roles per Resource	Number of Resources	Duration in Days	Total Cost (excl. VAT)	Total Cost (incl. VAT)	Total Cost for 3 Surveys (excl. VAT)
Project Management Survey, Redesign and Customisation of Survey and Questionnaire Survey 1				R 1.00	R 1.14	R 1.00
Project Management Survey, Redesign and Customisation of Survey and Questionnaire Survey 2					R 0.00	
Project Management Survey, Redesign and Customisation of Survey and Questionnaire Survey 3					R 0.00	

Survey Execution / Administration	Total Cost (excl. VAT)	Total Cost (incl. VAT)	Total cost for 3 Surveys (excl. VAT)	Total cost for 3 Surveys (incl. VAT)
Administration of Survey 1 to SARS headcount of 14000 employees including visually impaired participant (refer to section 9.2.7 and 9.2.2 of the RFP document)		R 0.00	R 0.00	R 0.00
Administration of Survey 2 to SARS headcount of 14000 employees including visually impaired participant (refer to section 9.2.7 and 9.2.2 of the RFP document)		R 0.00		
Administration of Survey 3 to SARS headcount of 14000 employees including visually impaired participant (refer to section 9.2.7 and 9.2.2 of the RFP document)		R 0.00		

Data Processing & Reporting	Total Cost (excl. VAT)	Total Cost (incl. VAT)	Total Cost for 3 survey (excl. VAT)	Total Cost for 3 Surveys (incl. VAT)
Reports for Survey 1 (Refer to section 9.2.4 of the RFP document for list of reports required)		R 0.00	R 0.00	R 0.00
Reports for Survey 2 (Refer to section 9.2.4 of the RFP document for list of reports required)		R 0.00		
Reports for Survey 3 (Refer to section 9.2.4 of the RFP document for list of reports required)		R 0.00		

Survey Result Prestantion and Action Planning	Total Cost (excl. VAT)	Total Cost (incl. VAT)	Total Cost for 3 survey (excl. VAT)	Total Cost for 3 Surveys (incl. VAT)
Results Presentation for Survey 1 (Refer to section 9.2.5 of the RFP document for list of reports required)		R 0.00	R 0.00	R 0.00
Results Presentation for Survey 2 (Refer to section 9.2.5 of the RFP document for list of reports required)		R 0.00		

BEE = 10 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: SBD 6.1 and a BBEE Certificate.	10

Bidders **MUST** complete and sign the SBD 6.1 form to claim the Bidder's BBEE preference points, failing which, the Bidder will be scored zero.

B-BBEE Key Sections to complete in SBD

BID DECLARATION

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

7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

7.1 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 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

8 SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

8.1.1 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? YES / NO (delete which is not applicable)

BEE Certificate

The table below indicates the specific B-BBEE certification documents that must be submitted for this tender. Failure to submit the required certification documents will also result in Bidders scoring zero for B-BBEE.

Classification	Turnover	Submission Requirement
Exempted Micro Enterprise (EME)	Below R5 million p.a. - (Old Codes)	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. A sworn Affidavit or Certificate from CIPC
	Below R10 million p.a. - (Amended Codes)	
Qualifying Enterprise (QSE)	Between R5 million and R35 million p.a. (Old Codes)	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA. A sworn Affidavit or Certificate from CIPC
	Between R10 million and R50 million p.a. (Amended Codes)	
Large Enterprise (LE)	Above R35 million p.a. (Old Codes)	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA.
	Above R50 million p.a. (Amended Codes)	

SARS will accept B-BBEE Certificate issued on the revised B-BBEE Codes.

Use and acceptance of affidavits

- ❑ It has been advised that the Verification Professional will need to test the affidavits submitted as part of a company's procurement rating. All companies will need to request the information which proves Black Ownership and Turnover in addition to the Affidavit, or request that their EME/QSE suppliers be verified and have this confirmed on the Affidavit.
- ❑ SARS reserves the right to request that bidders submit their Black ownership and turnover information in support of their Affidavits.

Joint Ventures and Consortiums

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

Sub-contracting

- Bidders who want to claim preference points will have to comply fully with regulations 11(8) and 11(9) of the Preferential Procurement Regulations, 2011 with regard to sub-contracting:

Regulation 11(8)

- A person must not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an Exempted Micro Enterprise that has the capability and ability to execute the sub-contract.

Regulation 11(9)

- ❑ 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.

Proof of Existence: Joint Ventures and/or Sub-Contracting

- ❑ 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 primary Bidder and the joint venture and/or sub-contracting party. The agreement must also clearly identify the primary Bidder, 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.

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Service Level Agreement

Service Providers 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 a Service Provider 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 with content of each file by the **26 October 2015 at 11:00**



TENDER BOX

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

Any enquiries must be referred, in writing via email to:
rft-professionalservices@sars.gov.za or tenderoffice@sars.gov.za

File 1: Original/ Duplicate

Exhibit 1

Pre-qualification documents (SBD documents)

- Tax Clearance Certificate – SBD 2
- SARS Oath of Secrecy
- Invitation to Bid – SBD 1
- Declaration of Interest – SBD 4
- Preference Point Claim Form – SBD 6.1
- Declaration of Bidders Past SCM Practices – SBD 8
- Certificate of Independent Bid Determination – SBD 9



Exhibit 2

- Bidder Compliance Checklist – Annexure A2
- Response to Technical Requirements
- Supporting documents for technical responses
- References/ testimonials



Exhibit 3

- Company profile
- Supplementary information



Exhibit 4

- General Conditions of Contract
- Draft Services Agreement



Exhibit 5

- BBBEE Certificate



Exhibit 6

- Pricing Schedule (Annexure B)



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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