

# **Provision for Medical Aid Brokerage Services for SARS**

<b>Briefing Session</b>	<b>19 September 2016, 14h00</b>
<b>RFP No</b>	<b>RFP 16/2016</b>
<b>Closing Date</b>	<b>11 October 2016, 11h00</b>

# Bid Evaluation Committee

## Procurement

Sourcing Lead: Professional Services – Project Oversight

Price Evaluator

BBBEE Evaluator

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Pre-Qualification

## SARS – Human Capital & Development

Ops Specialist: Human Resources – Technical Evaluator

Specialist: Remunerations – Technical Evaluator

Specialist: Remunerations – Technical Evaluator

Manager : HR Business Partner – Technical Evaluator

## Corporate Legal Services

Legal Specialist

# Table of Content

1. Welcome and Introduction

**2. RFP Timelines**

3. Background

4. Scope of Work

5. Bid Evaluation Process

6. Price & BBBEE

7. Draft SLA

8. RFP submission and contact details

9. Q&A

# RFP Timelines

ACTIVITY	DUE DATE
RFP Advertisement in Government Tender Bulletin	09 September 2016
Tender documents on SARS website	12 September 2016
<b>Non-compulsory briefing session</b>	<b>19 September 2016, 14H00</b>
Questions relating to RFP	30 September 2016
RFP Closing Date	11 October 2016, 11h00
Notice to bidders	Nov/ Dec 2016

**The following changes have been amended on section 10.5 page 12 of the RFP document:**

**Closing date from 04 October 2016 to 11 October 2016.**

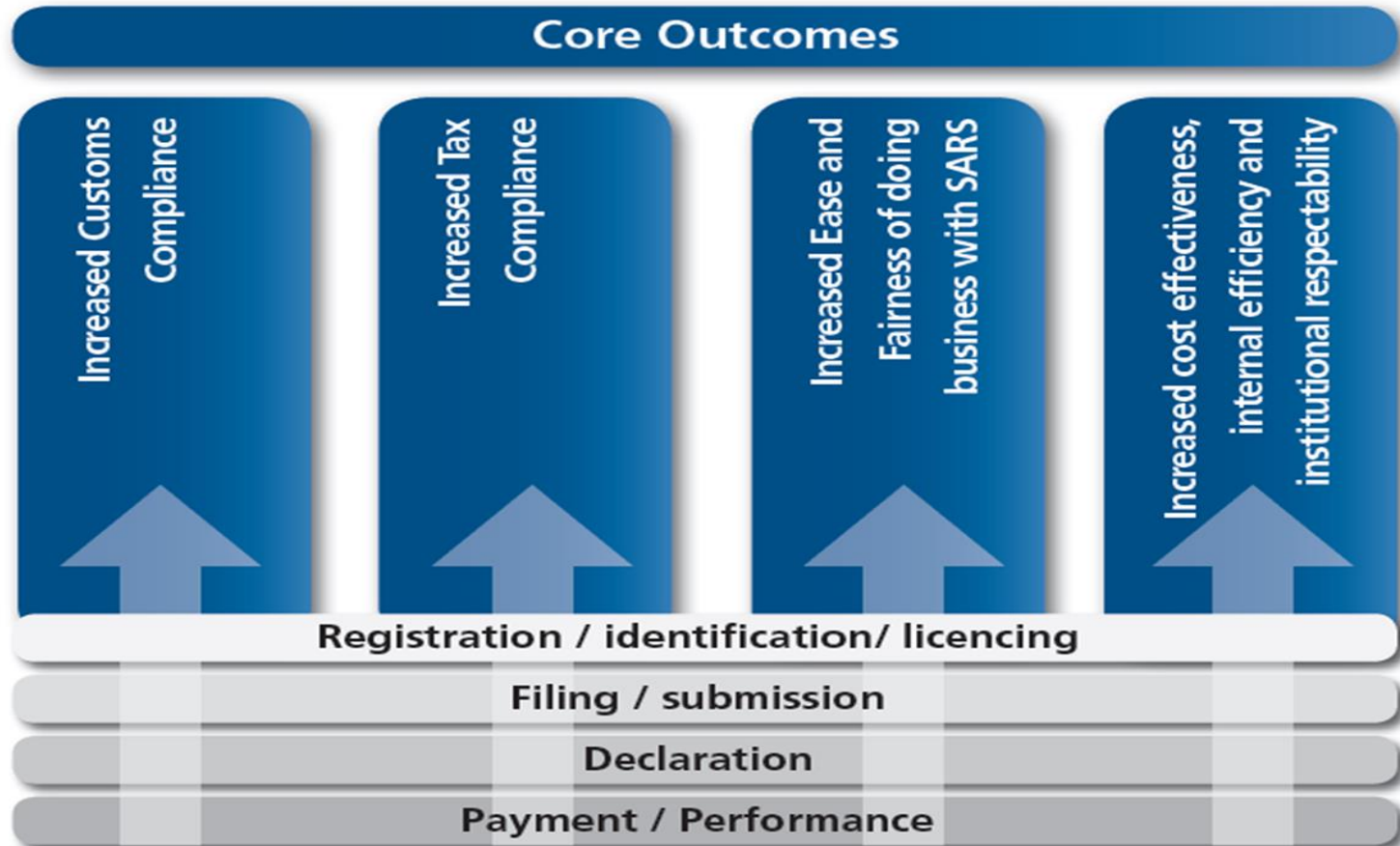
**Note: Erratum has been published on Government Bulletin & SARS website.**

# Table of Content

1. Welcome and Introduction
2. RFP Timelines
- 3. Background**
- 4. Scope of Work**
- 5. Bid Evaluation Process**
- 6. Price & BBBEE**
- 7. Draft SLA**
- 8. RFP submission and contact details**
- 9. Q&A**

# Background

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



**RFP 16/2016 PDF**



# Table of Content

1. Welcome and Introduction
2. RFP Timelines
3. Background
- 4. Scope of Work**
5. Bid Evaluation Process
6. Price & BBBEE
7. Draft SLA
8. RFP submission and contact details
9. Q&A

**RFP 16/2016 PDF**

# Table of Content

1. Welcome and Introduction
2. RFP Timelines
3. Background
4. Scope of Work
- 5. Bid Evaluation Process**
- 6. Price & BBBEE**
- 7. Draft SLA**
- 8. RFP submission and contact details**
- 9. Q&A**

### Gate 0

Pre-Qualification

- Tax Clearance Certificate SBD 2
- Invitation to Bid SBD 1
- Central Registration Report (Central Database System) from National Treasury
- 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

### Gate 1

Technical Evaluation

100  
points

Achieve overall score  
of 75 out of 100  
points to proceed  
to Gate 2

- Company profile and resources
- Capability
- National Footprint
- Value Added Services
- Testimonials
- Proof of professional Indemnity Insurance

### Gate 2

BBBEE

10 points

Price

- BBBEE certificate
- Bidders are required to disclose all fees that will be applicable to the services.

# 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	<b>Experience of the bidder</b>	Yes			Page 9 to 12 - exhibit 2	
2.1	<b>Provide the approach, processes and methodology that will be applied by demonstrating the alignment to the SARS requirements and scope of work.</b>	EXAMPLE	Yes		Page 13 to 15 - exhibit 2	Bidder to state reason for partial compliance
2.2	<b>Demonstrate the capability and capacity to deliver the service</b>			No	Page 17 to 20 - exhibit 5	Bidder to state reason for non-compliance

# Table of Content

1. Welcome and Introduction

2. RFP Timelines

3. Background

4. Scope of Work

5. Bid Evaluation Process

**6. BBBEE**

7. Draft SLA

8. RFP submission and contact details

9. Q&A

## 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.

# Bid Evaluation Process Gate 2 – B-BBEE (cont.)

## B-BBEE key Sections to complete in SBD 6.1

### 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 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 a sworn affidavit.

### 7. SUB-CONTRACTING

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

(Tick applicable box)

YES		NO	
-----	--	----	--

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.

(Tick applicable box)

YES		NO	
-----	--	----	--



# Bid Evaluation Process Gate 2 – B-BBEE (cont.)

## 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.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by the Independent Regulatory Board for Auditors (“IRBA”) or a letter from an Accounting Officer as contemplated in the CCA.
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 Registered Auditor approved by the IRBA.
3.	Large Enterprise (LE)	Above R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by the IRBA.

**NB: SARS will accept B-BBEE Certificates issued under the revised B-BBEE Codes.**

## Points Awarded for BBEE Contribution

B-BBEE Contributor Level	Number of Points (80/20 system)	Number of Points (90/10 system)
1	20	10
2	18	9
3	16	8
4	12	5
5	8	4
6	6	3
7	4	2
8	2	1
Non-Compliant Contributor	0	0

# Table of Content

1. Welcome and Introduction

2. RFP Timelines

3. Background

4. Scope of Work

5. Bid Evaluation Process

6. Price and BBBEE

**7. Draft SLA**

**8. RFP submission and contact details**

**9. Q&A**

# 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.

# Table of Content

1. Welcome and Introduction

2. RFP Timelines

3. Background

4. Scope of Work

5. Bid Evaluation Process

6. BBBEE

7. Draft SLA

**8. RFP submission and contact details**

**9. Q&A**

# Bid Submission

Bidders must submit copies of each file (Original and Duplicate) and a CD-ROM with content of each file by the **11 October 2016 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](mailto:rft-professionalservices@sars.gov.za) or [tenderoffice@sars.gov.za](mailto:tenderoffice@sars.gov.za)

# File 1: Original/ Duplicate

## Exhibit 1

### Pre-qualification documents (SBD documents)

- CSD Registration Report (Central Supplier Database ) from National Treasury
- 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



**NB !**

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



# Table of Content

1. Welcome and Introduction
2. RFP Timelines
3. Background
4. Scope of Work
5. Bid Evaluation Process
6. BBBEE
7. Draft SLA
8. RFP submission and contact details

## 9. Q&A

