

Provision of Operations Management Development and Management Development Programmes for SARS

Briefing Session	05 February 2018 at 14H00
RFP No	RFP 31/2017
Closing Date	20 February 2018, 11h00

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Bid Evaluation Committee

Procurement

Sourcing Lead: Professional Services – Project Oversight

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Pre-Qualification

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	19 January 2018
Tender documents on SARS website	19 January 2018
Non-compulsory briefing session	05 February 2018 at 14H00
Questions relating to RFP	22 January - 13 February 2018
RFP Closing Date	20 February 2018, 11h00
Notice to bidders	May/ June 2018

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Background and Scope of work

Refer to section 9.1 and 9.2 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
- 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
- Supplier cost and risk assessment questionnaire
- Service Provider Compliance Form for Technical Evaluation
- **Mandatory Requirements – Accreditation with South African Council of Higher Education (CHE) or other recognised accreditation bodies**

Gate 1

Technical Evaluation

100 points

Achieve overall score of 70 out of 100 points to proceed to Gate 2

- Company profile , Resources & Infrastructure
- Capability
- Methodology and Approach and High level Project Plan
- Testimonials

Gate 2

BBBEE = 20

100 points

Price = 80

Technical Requirements

Bidders are required to complete Annexure A1 & 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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Bid Evaluation Process Gate 2 (Price & BBBEE)

PRICING

Bid Evaluation Process Gate 2 – 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 Template



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 2 (Price & BBEE)

B-BBEE

Bid Evaluation Process Gate 2 –BBBEE

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.	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 sworn affidavits.
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 or sworn affidavits.
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.

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 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

Compulsory Subcontracting of a minimum 30% to contracts or projects above R30 million to EMEs or QSEs.

Organs of state are not prevented from enforcing sub-contracting (where applicable) to contracts or projects below R30 million

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

(Tick applicable box)

7.1.1 If yes, indicate:

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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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"/>
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The organ of state must make available the list of all suppliers registered on a database approved by the National Treasury to provide the required goods and services in respect of the applicable designated groups mentioned in sub-regulation (2) from which the tenderer must select a supplier.

The discretionary 25% or more subcontracting it is still applicable (Regulation 12). Nothing prevents organs of state from enforcing subcontracting to contracts or projects below R30 million.

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 (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.

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 2 (Price & BBBEE)

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 2.

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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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 or USB with content of each file by the **20 February 2018 at 11:00**



TENDER BOX

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

Any enquiries must be referred, in writing via email:
rft-professionalservices@sars.gov.za or tenderoffice@sars.gov.za
(22 January 2018 – 13 February 2018)

File 1: Original/ Duplicate

Exhibit 1

- Pre-qualification documents (SBD documents)
- Information on proof of accreditation



Exhibit 2

- Bidder Compliance Checklist – Annexure A1 & A2
- Response to Technical Requirements
- Supporting documents for technical responses
- Testimonials



Exhibit 3

- Supporting documents for technical responses/
Supplementary information
- Financial Statement



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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