

APPOINTMENT OF SERVICE PROVIDERS FOR INFORMATION TECHNOLOGY AND RELATED COURSES (CLASSROOM AND ONLINE TRAINING DELIVERY)

Briefing Session: 25 April 2019 at 10H00

RFP No.: RFP 67/2018 A & B

Closing Date: 16 May 2019, 11H00

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Bid Evaluation Committee

Procurement

Sourcing Lead: Professional Services – Project Oversight

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Tender Queries

Value Delivery Planning – Price Evaluator

Financial Analysis Team

B-BBEE Evaluator

SARS Business Unit

Bid Specification Committee

Technical Evaluators

Corporate Legal Services

Legal Specialist

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RFP Timelines

ACTIVITY	DUE DATE
RFP Advertisement in Government Tender Bulletin	12 April 2019
Tender documents on SARS website	15 April 2019
Non-compulsory briefing session	25 April 2019 at 10H00
Questions relating to RFP	15 April 2019 to 08 May 2019
RFP Closing Date	16 May 2019, 11h00
Notice to bidders	*August 2019

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Background

SARS recognises that its people are indispensable drivers for performance and holds key to the organisations ability to operate efficiently and transform successfully. Therefore, SARS strives to create a culture where its workforce can thrive, simultaneously developing their own talents and delivering outstanding services to the taxpayers and traders.

SARS Strategic Plan 2015/16 to 2019/20 outlines the organisational strategy for the full five years term. One of the key strategic shifts the organisation strives to address is people performing at their peak. Therefore SARS strives to create a culture where its workforce can thrive simultaneously developing their own talents and delivering outstanding services to our tax payers and traders.

SARS requires the services of Information Technology Training Providers that are accredited by Original Equipment Manufacturer (OEM) for the provision of training and related courses

SARS Institute Of Learning

SARS Institute of Learning (SIOL) key function is to upskill and nurture SARS employees, particularly in ensuring that they acquire the knowledge and sound technical expertise in Tax, Excise and Customs so that they are able to operate effectively.

The mandate of SIOL is to build human capability through its various faculties. SIOL operates its mandate on the following three key pillars:

- Customer Centrism;
- Business Orientation; and
- Professionalism.

SIOL has seven (7) different faculties/schools namely; School of Business, School of Technology, School of Taxation, School of Enforcement, School of Customs & Excise and School of Leadership & Management Development.

The focus of the tender is under the School of Technology which its own mandate is to develop and deliver SARS Legacy systems, Microsoft end-user, e-Learning and Information Technology technical courses.

RFP 67/2018A: Scope of work

Refer to section 9.3 - 9.8 of the RFP document (page 07 - 17).



RFP 67/2018 A:
Main RFP Document



RFP 67/2018 B:
Main RFP document

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Bid Evaluation Process: Refer to paragraph 12 of the RFP document

Gate 0

Pre-Qualification

RFP 67/2018 A & B

- Invitation to Bid SBD 1
- 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
- Central Registration Report (Central Database System) from NT
- GCC
- SARS Oath / Affirmation of Secrecy
- Supplier cost and risk assessment questionnaire
- Central Supplier Database (CSD) Registration Report

Bid Evaluation Process: Refer to paragraph 12 of the RFP document

Gate 1

Technical Mandatory
Evaluation

RFP 67/2018 A

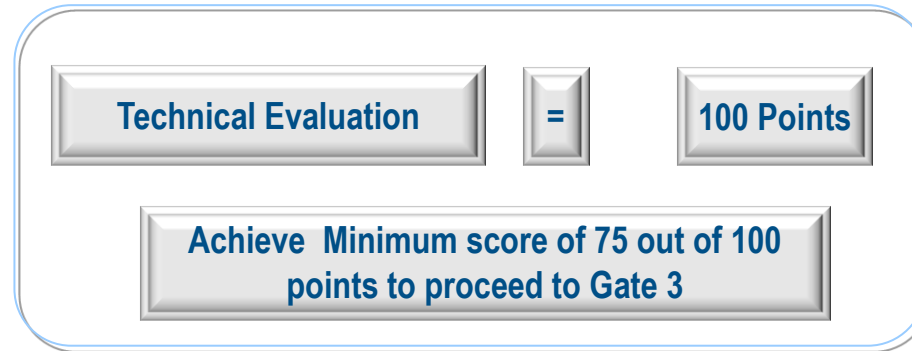
- Accreditation
- Training Venue in Gauteng

RFP 67/2018 B

- Accreditation

Bid Evaluation Process: Refer to paragraph 12 of the RFP document

Gate 2



RFP 67/2018 A

- Company profile
- Capability
- Candidate Support

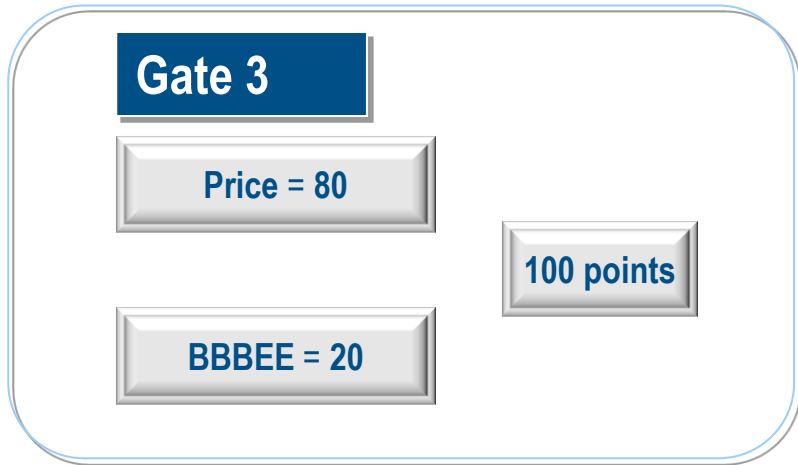
Refer to Annexure D1 - Technical Evaluation Criteria

RFP 67/2018 B

- Company profile
- Capability
- Candidate Support
- Online System Capability

Refer to Annexure D1 - Technical Evaluation Criteria

Bid Evaluation Process: Refer to paragraph 12 of the RFP document



Note:

- SARS reserves the right to award part of a bid rather than the whole bid.
- SARS reserves the right to appoint one (1) or more service provider(s) for each course under all eleven (11) categories, who will provide Classroom IT Training Services.

Technical Requirements

Bidders are required to complete Annexure D2 to assist the evaluators to locate technical responses.

Section No	Technical Criteria	Compliant	Partially Compliant	Non-Compliant	Reference page in Proposal	Comments
1	Company profile	Yes			Page 9 to 12 - exhibit 2	
2	Capability	EXAMPLE	Yes		Page 13 to 15 - exhibit 2	Bidder to state reason for partial compliance
3	Candidate Support			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 (RFP 67/2018 A & B)

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 C – Pricing Template



RFP 67/2018 A:
Pricing Template



RFP 67/2018 B:
Pricing Template

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 = Price of Bid under consideration
 P_{\min} = Price of lowest acceptable Bid

Bid Evaluation Process: Gate 2 – Price

Bidders are required to consider the following prior to completion of the pricing schedule - Annexure C:

- Bidders should note that SARS reserves the right to accept part of a Bid (as per the pricing template) rather than the whole bid proposal; and
- The Bidder's pricing must be all cost inclusive. No cost escalations will be considered once the Successful Bidder has been appointed. Furthermore, a Bidder must note that it will not be entitled to recover accommodation, travel or subsistence costs from SARS.

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

B-BBEE (RFP 67/2018 A&B)

B-BBEE = 20 points

Stage 2: B-BBEE Evaluation (20 points)

ADJUDICATION CRITERIA	POINTS
A duly completed Preference Point Claim Form: SBD 6.1 and a B-BBEE Certificate.	20

Bidders **MUST** complete and sign the SBD 6.1 form to claim the Bidder's B-BBEE preference points.

B-BBEE Requirements

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 being disqualified.

Classification	Turnover	Submission Requirement
Exempted Micro Enterprise (EME)	Below R10 million p.a.	A DTI Affidavit; Certificate from CIPC; or Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating.
Qualifying Small Enterprise (QSE)	Between R10 million and R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating; or A DTI Affidavit – Only 51% BO and above.
Large Enterprise (LE)	Above R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency.

Use and Acceptance of Affidavits

Section 1.6 of the SBD 6.1 form states, *“The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.”*

SARS reserves the right to request that bidders submit their Black ownership and turnover information in support of their Affidavits.

B-BBEE KEY SECTIONS TO COMPLETE IN SBD 6.1

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 requirements cont.

JOINT VENTURES

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 regulation 12(3) of the Preferential Procurement Regulations, 2017 with regard to sub-contracting:
- *“A person awarded a contract may not subcontract 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 of contributor than the person concerned, unless the contract is subcontracted to an EME 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 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.

Bid Evaluation Process Financial Analysis (RFP 67/2018 A&B)

Guiding Regulations

Public Finance Management Act (PFMA)

- Fair
- Equitable
- Transparent
- Competitive
- Cost Effective

Financial Evaluation

- Financially Stable
- Financially Viable
- Identify Financial Risks
- Apply Appropriate Mitigating Strategies

Financial Evaluation

- **Complete Sets of Audited/ Independently Reviewed Annual Financial Statements**

- ✓ Signed Auditors / Accounting Officers Opinions
- ✓ Statement of Comprehensive Income (*Income Statement*)
- ✓ Statement of Financial Position (*Balance Sheet*)
- ✓ Statement of Cash Flows (*Cash Flow Statement*)
- ✓ Accompanying Unabridged Notes for ALL of the above documents

- **Less than 3 Financial Periods**

Explanatory Letter

- **Joint Ventures**

Unincorporated JVs must submit separate F/S for each party to the JV.
Signed JV legal agreement.

- **Financial statements in Bidding Companies Name**

Subsidiary submitting holding company's F/S must also furnish a Performance Guarantee.

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Services Agreement

- Bidders are allowed to provide suggested contract amendment (contract mark-ups), if any, for SARS's consideration for which the Bidder will be assessed on. SARS will not accept any "standard terms and conditions" or a complete re-write of the service agreement by the Bidder.
- Upon award, SARS and the successful Bidder will conclude an 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.
- SARS reserves the right to vary the proposed terms and conditions of the draft Services Agreement upon the award of this RFP.
- Bidders are not required to sign the draft Services Agreement when submitting the proposal.

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Bid Submission

Bidders must submit copies of each file (Original and Duplicate) and a USB with content of each file by the **16 May 2019 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 and rft-professionalservices@sars.gov.za

File 1: Original / Duplicate

Exhibit 1

Pre-qualification documents

- SBD documents and other



Exhibit 2

Technical Responses RFP 67/2018 A

- Company profile
- Candidate support



Exhibit 2

Technical Responses RFP 67/2018 B

- Company profile
- Candidate support
- Online system capability



File 1: Original / Duplicate

Technical Responses per category RFP 67/2018 A & B

- Exhibit 2a – Category A: Microsoft courses;
- Exhibit 2b – Category B: Information Technology Infrastructure Library (ITIL) courses;
- Exhibit 2c – Category C: Computing Technology Industry Association (COMPTIA) courses;
- Exhibit 2d – Category D: IBM courses;
- Exhibit 2e – Category D: International Software Testing Qualifications Board (ISTQB) courses;
- Exhibit 2f – Category F: ISO for Information Security Management courses;
- Exhibit 2g – Category G: COBIT courses;
- Exhibit 2h – Category H: TOGAF courses;
- Exhibit 2i – Category I: EC-Council courses;
- Exhibit 2j – Category J: CISCO courses;
- Exhibit 2k – Category K: ISO for Business Continuity Management (BCM) courses;

Exhibit 3



File 2: Original / Duplicate

Exhibit 1

- B-BBEE Certificate
- SBD 6.1
- Pricing Schedule (RFP 67/2018 A & B)



Exhibit 2

- Financial Statements



NB!

Bidders are required to mark their files correctly as indicated above. Bidders are also required to submit a separate file for each category they are bidding for. USB marked with the Bidder's name.

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