



REFERENCE: RFP 0024/2019

REQUEST FOR PROPOSAL

DESCRIPTION:

APPOINTMENT OF A SERVICE PROVIDER FOR THE RENTAL OF AN ELECTRONIC JOB DESIGN TOOL

DATE ISSUED: 04 October 2019

CLOSING DATE: 28 October 2019 at 11:00

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

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

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 is to solicit proposals from potential Bidders for the rental of an Electronic Job Design Tool.

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

4. LEGISLATIVE METHODOLOGY OF THE BID

4.1. LEGISLATION

The Bidder should be familiar with all relevant legislation, including but not limited to tax laws applicable in the Republic of South Africa and should fully comply with such laws.

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

Bidder(s) should be cognisant of the legislation applicable to services rendered.

5. BRIEFING SESSION

A non-compulsory briefing session will be held at Brooklyn Bridge, Linton House, 570 Fehrsen Street, Brooklyn, Pretoria, to clarify to bidders the scope and extent of work to be executed. Refer to paragraph 7 on the date and time.

6. DURATION OF CONTRACT

The successful Bidder will be appointed for a maximum period of thirty six (36) months subject to funds availability and business needs requirements.

7. TIMELINE OF THE BID PROCESS

The validity period is 180 days after the closing date of the bid. The project timeframes of this bid are set out below:

Table 1

Activity	Date Due
Advertisement of Bid in the Government Tender Bulletin	04 October 2019
Advertisement of Bid in the eTender website	04 October 2019
Distribution of Bid documents on SARS website	04 October 2019
Questions relating to the bid from bidder(s)	04 October 2019 to 18 October 2019
Non Compulsory Briefing Session	10 October 2019 at 11H15
Bid Closing Date	28 October 2019 at 11H00
Notice to Bidders	*January/February 2020

* 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' 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 bidders 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 potential bidder(s) can make enquiries in writing, to the specified person, Mr Andre Taljaard (Procurement Tender Office) via email at tenderoffice@sars.gov.za and cc [rft-](#)

professionalservices@sars.gov.za. Potential bidder(s) must reduce all telephonic enquiries to writing and send them to the above email addresses.

9. SCOPE OF WORK

9.1 BACKGROUND

During 2013 SARS Human Resources embarked on a comprehensive project, identifying and implementing a suitable methodology for job design. The methodology selected was built on Levels of Work with standardised job design criteria, based on universally acceptable criteria which are contained in a number of libraries. Thus, a single job design solution was established, leading to the development of generic Job Profiles for each job on the SARS Job Catalogue. The methodology selected was system independent to enable Job Design to take place on any suitable platform.

This enabled the following processes:

- Population of Job Profiles from a single reference catalogue;
- Standardised competencies (Behavioural, Leadership, Compliance and Technical) and outputs customised for the SARS environment;
- The efficient and effective identification of competency gaps;
- Providing a foundation for ensuring integrated HR process delivery – talent, training and development; and
- Compliance with legislative requirements, such as the OFO coded occupational classification system.

During 2018 SARS implemented the SAP SuccessFactors Recruitment module. This is also used as a vehicle to display job profiles to employees. SARS conducted an investigation into the use of the SuccessFactors functionality for the creation of Job Profiles. Due to the fact that some critical requirements could not be met, SuccessFactors remains the application for display only. For this purpose the relevant Job Profile criteria are maintained alongside the Job Profiling tool.

9.2 SCOPE OF SERVICES

The rental of an electronic Job Design tool which will allow SARS to migrate existing Job profiles and associated library content. This must be an existing tool, which will be aligned for SARS' Job design purposes. The tool has to accommodate the following job design features:

9.2.1 Job Design Architecture

SARS uses the “work-centric” architectural approach which represents a clear and distinct focus on work and structure before thinking about people.

The work-centric approach is underpinned and supported by a best practice functional HR architecture protocol, which enables SARS to design and manage all jobs more effectively, by means of:

- The Levels of Work concept as a framework to distinguish various types of work determined by the levels of decision making and accountability;
- The determination of essential business capabilities at Job Family level, which are then inherited by jobs linked to the family;
- Application of customised and standardised Competency and Output Libraries for SARS; and
- The definition of enterprise jobs, which are essential for standardisation. All jobs are linked to an enterprise job which will house the competencies and outputs which are standard to the jobs linked to it. These are inherited and pre-populated in the job profile.

9.2.1.1 Levels of Work

SARS has adopted the standard levelling methodology interpretation of Levels of Work as defined by the Hay Group (BIOSS), with specific alignment to the SARS Leadership Matrix. This includes the use of sub-levelling to differentiate between Generalist/Specialist type jobs and facilitate the depth of reporting within the organisation (designed compression). A diagram below depicts the adopted levelling framework and the SARS positioning thereof:

Theme of Work	Level of Work	SARS Sub-level	SARS Job Grade	Functional Description
Enterprise Leadership	5	High 5	10	Commissioner
Strategy Formulation	5	Low 5	9B	Chief Officer
Strategy Alignment	4	High 4	9A	Group Executive
Strategy Enablement	4	Low 4	8B	Executive
Tactical Development	3	High 3	8A	Sen Manager/Sen Specialist
Tactical Implementation	3	Low 3	7	Manager/ Specialist

Theme of Work	Level of Work	SARS Sub-level	SARS Job Grade	Functional Description
Operational Optimisation	2	High 2	6	Operational Manager/ Operational Specialist
Operational Coordination	2	Low 2	5A – 5B	Functional Specialist
Operational Delivery: Team Member	1	High 1	4A – 4B	Team Member (highly skilled knowledge employee)/Team Member
Operational Delivery: Administrator	1	Mid 1	3A – 3B	Administrator (Knowledge worker)/ Administrator
Operational Delivery: Logistical Support	1	Low 1	1 – 2	Logistical Support (general worker)

**Levels of work already in use through Talent Management.*

9.2.1.2 Job Families

Job Families are beneficial when determining the pay for a particular job, either internally or externally as it relates to all other jobs in an organisation or industry. Job Families in use at SARS take into consideration the SARS value chain and delivery model.

9.2.1.3 Jobs

The required output of the job profiling tool is a job profile of a SARS specific job.

- A Job describes the nature of work and reflects the essential outcomes expected from doing the work. The same job may be performed in different areas of the business. For example, the job Personal Assistant can occur in many business areas in an organisation.
- Every Job has multiple attributes such as a Job Title, Job Family and Theme of Work associated with it. In addition, SARS has defined other information that better describes the requirements of the Job for remuneration, recruitment and reporting purposes etc. Below are the SARS job attributes contained in each job which have to be defined in the tool:

Attribute	Mandatory Information for Job Design Purposes	Optional Information for other HR Processes
Job Title	X	
Job Family	X	
Level of Work	X	
Job Purpose	X	
Job Grade (only after job evaluation process)	X	
OFO Code (legislative requirement)	X	
Occupational Category, Function and Level		X
Minimum Experience (external)	X	
Relevant qualification and experience (mainly for IT jobs)	X	
Minimum Alternative Experience (internal)	X	
Minimum Qualification (Qualification Type and NQF Level)	X	
Minimum alternative Qualification	X	
Minimum Functional requirements	X	
SAP Job Code		X

9.2.1.4 Competency Library

Each Job contains a number of competencies which are selected from a competency library. The library is structured as follows:

- The competency library incorporates SARS leadership, behavioural, technical and compliance competencies. Unique competency data has been incorporated into the catalogue per Function (HR; Customs; Research & Information Management; Finance; IT, etc.).
- The library structure has to make provision for the below mentioned sub levels to be maintained and standardised accordingly:
 - Competency type
 - (Leadership/Behaviour/Technical/Compliance)
 - Name and short description
 - Proficiency level indicator and label descriptor
 - Proficiency/Behavioural indicators
 - Functional Requirements (Specific to the job)

Competencies follow an inheritance principle which should be accommodated by the tool. This requires the grouping of competencies according to pre-defined criteria (Enterprise competencies). If a job is

aligned to those criteria, inheritance takes place. When allocating Competencies to a particular Job Profile, the following process steps will apply:

- Enterprise-job (organisation-wide per Level of Work) Competencies (mostly behavioural) are populated into the Job Profile through an automated process called “inheritance”;
- Job-family Enterprise Job Competencies (mostly managerial and/or technical) are populated through an automated process; and
- Function or Job Specific Competencies are manually allocated in addition to the above (mostly technical and/or compliance).

The competency example below is representative of the required structure:

Competency Group: Behavioural

Competency Name: Commitment to Higher Purpose

Competency Definition: Shows an ability and willingness to align own behaviour with the needs, priorities and goals of SARS.

Proficiency Level	Competency Descriptor	Behavioural Indicators
1.	Expresses positive feelings of commitment to the organisation	Expresses positive feelings of commitment to the organisation. Is proud to be part of the organisation. Respect for the way things are done in the organisation and does what is expected.
2.	Reinforces commitment	Understands and works towards meeting SARS's priorities and objectives. Sets aside professional concerns or priorities for the overall benefit of SARS customers.
3.	Supports the organisation	Puts organisational needs ahead of own personal views and agendas. Makes the personal commitment necessary to pursue significant business opportunities. Publicly acts in support of SARS mission.
4.	Puts the organisational needs first	Asks team to make personal sacrifices to meet overall business needs. Supports decisions that benefit SARS, even if they are controversial or unpopular. Defends

Proficiency Level	Competency Descriptor	Behavioural Indicators
		SARS interests and image when interacting with others.
5.	Promotes an organisational culture conducive to business sustainability	Develops an approach to improve efficiency and effectiveness of the organisational structure, by using creative reorganising concepts. Considers various viewpoints from internal and external sources when developing a new organisational mission and vision. Builds nationwide, regional and international coalitions to develop and garner support for shared services.

This means that competencies are available from a single source (one catalogue) and will be maintained centrally.

9.2.1.5 Output Library

Each Job also contains a number of standardised outputs, which reside in the Output Library. The output library is a repository of standardised outcomes and/or end results associated with a piece of work (job). It is a collection of standard, reusable output statements that promote efficiency and consistency when creating Jobs and linking them to performance. The creation of Outputs follows pre-defined design principles, such as a consistent style and manner of formulation. Outputs associated with or assigned to a Job describe the responsibilities regularly performed by the job.

- Outputs in the library must be linked to Levels of Work and Job Families to facilitate inheritance, i.e. some outputs are standard per Theme of work and/or Job Family and have to be identified as such in the tool.
- Outputs are grouped into four standard categories, i.e. process, people, finance and customer.

9.2.1.6 Job Profiling

An electronic profiling software solution that fully addresses business needs in the design of jobs is essential. It should create, clean, maintain and validate job profile information for the purposes of making job profiles available to employees and managers alike in PDF or Word format. This ensures:

- Facilitation of faster delivery of enterprise jobs and job profiles;
- Quality and consistency by utilizing standardized output and competency libraries;

- Utilisation of an auto populate function to reduce human error and ensure consistent application and data integrity of profile information;
- Workflow capability for quality checking of profiles prior to publishing, i.e. when a draft profile is created it is checked for accuracy and consistency by another user;
- Audit trails of changes in data;
- Ease of access and maintenance of a “single version of the truth” pertaining to core job profile data; and
- Provisioning of Job Profiles in a standardized format and layout.

9.2.1.7 Legislative Compliance – OFO coding system

- Within the context of Job Design, the National Qualifications Framework (NQF) has reference to compliance with regard to the Organizing Framework for Occupations (OFO) coding system, which is essential especially when submitting WSP, ATR and the associated grant recovery process.
- SARS has classified all jobs according to the OFO system. The job profiling tool has to make provision for periodic updates of this framework, as and when they are released. It also has to allow for the assigning of an OFO code to a new job profile.

9.2.2 IT Compatibility

Bidder to ensure compatibility to SARS IT infrastructure and security regulations, available on request from SARS.

9.2.3 Architectural Guidelines

SARS requires the Bidder's solution to conform to the architectural guidelines in this section:

- 9.2.3.1 The technology platform offered to SARS must be externally hosted that is on the internet outside of SARS private cloud model where the Bidder provides connectivity via TCP/IP encrypted secure https internet and proxy connection to the application which is provisioned by the Bidder in a secure and SARS approved data centre.
- 9.2.3.2 The solution application must be accessible to all designated/licensed users via the standard IS web browser from the SARS Intranet.
- 9.2.3.3 Regardless of the application configuration the application must follow the SARS standard quality assurance, testing and change management processes before operating in production mode. While in production mode the Bidder must adhere to SARS operational practices in terms of problem management. All incidents impacting on system performance must be notified to SARS SIO in confirmation with standard operating practices.
- 9.2.3.4 Full compatibility testing, auditing and performance testing will form part of the contract acceptance

criteria.

- 9.2.3.5 When responding to the private cloud based solution, the Bidder must demonstrate that its data centre environment has provisions for data backup and recovery, disaster recovery and business continuity provisions in the event of a disaster.
- 9.2.3.6 The application must offer a session recovery capability in the event of system failure without any user data loss.
- 9.2.3.7 The application operating environment must guarantee the confidentiality of SARS data which must not be available to third parties.
- 9.2.3.8 All data remains the property of SARS and all raw data must be handed over to SARS at the end of the contract period. All SARS data held by the Bidder must be destroyed and evidence of this presented to SARS, after the contract period. During the period of application operation, any decommissioned component bearing SARS data must be treated in terms of SARS information security requirements.

9.2.4 Training

- The appointed service provider will be required to conduct training for SARS super users of the Job Design Tool prior to go live.
- Post implementation SARS may require training on an ad-hoc basis.

9.2.5 Performance Measures/Deliverables

The appointed Bidder will be expected to deliver on the following:

- During the SARS working hours (Monday to Friday) the Job Design Tool must offer better than 99% system availability to its users – support contract and SLA's will be agreed;
- Training of super users of the tool as and when required by SARS;
- Generate existing reports on an ad hoc basis within 24 hours; and
- 24 hours turnaround time for resolution of support related services.

9.3 BIDDERS RESPONSES/DOCUMENTATION REQUIRED

Bidders are required to submit their detailed response to the information in this section. Furthermore, Bidders will be invited for a Presentation and Live Demonstration of the Job Design Tool.

9.3.1 Company Profile and Resources

The Bidders should **provide in their response and present** to SARS, detailing the following:

- Company Organogram;
- Services rendered in respect of offering the electronic job design tool;

- Years of experience in the industry; and
- The company's full contact details of key account manager who will be assigned to SARS.

9.3.2 References

Bidders must **provide in their response and present** to SARS, three (3) South African client references (Annexure A) not older than 36 months who have fully implemented the electronic Job design tool. Bidders should provide this information by **completing Annexure A**.

The reference information for each client provided must include the following:

- Company Name;
- Contact Person
- Size of the company;
- Phone numbers;
- Business address;
- Duration of the contract; and
- Brief description of the services provided.

Please note that SARS reserves the right to contact the clients for a reference check. It is important to ensure that the clients listed by the Bidder are contactable.

9.3.3 System Functionality

Bidders must provide print screens of their proposed system in the tender documents. Bidders will be invited to **perform a live demonstration** of their proposed system based on information provided in **Annexure B** (SARS Job Profile Example).

9.3.3.1 The submitted print screens should depict the following information:

- A completed online Job Profile view
- An example of an audit trail of user changes
- Demonstrate how a user can edit/create the following in the tool:
 - Job Title and SAP Job Code
 - Job purpose
 - Job Grade
 - Legislative compliance (OFO code)
 - Occupational Category, Function and Level
 - Levels of work
 - Job families

- Job criteria (Qualifications, experience, functional requirements)
- Competency library with the structural requirements as per the example in 9.2.1.4
- Output library with outputs grouped

9.3.3.2 Bidders must clearly describe the data structure for each of the above Job criteria with regard to the following:

- Type of field (free text, selection field with content in list or library)
- Any field length restrictions

9.3.3.3 Clearly demonstrate if the tool is set up to handle inheritance of outputs and competencies based on Enterprise Jobs, Job Families, Levels of Work and associated sub-levels, i.e. managers and specialists.

9.3.3.4 Demonstrate how workflow is utilised to perform quality checks of job Profiles

9.3.3.5 Present the list of reporting capabilities:

- End user generated reports
- Standard reports
- Custom reports
- Reporting export to Excel and PDF

9.3.3.6 Present and demonstrate the document output capabilities for the completed job profile

- PDF
- Word

9.3.4 Methodology and Approach

Bidders should **provide in their response and present** to SARS:

- A summary of the approach/standard procedures that will be applied during implementation stage of this contract.
- A project plan that demonstrates the time required to have the system:
 - Customised;
 - Tested; and
 - Implemented
- The above timelines must include data take-on (Approximately 1300 job profiles) from SARS.

9.3.5 User Support

Bidders should **provide in their response and present** the following:

- SARS users of the Job profiling tool must be able to log support calls electronically and/or telephonically.
- Bidder to provide a schedule of standard response times for any support requests logged.
- Bidders must indicate the nature of support, whether it is locally based.

9.3.6 Data Security and Disaster Recovery

Bidders should **provide in their response and present** the following plans/strategy:

- Data Security Plan – outline what security measures are in place in your infrastructure to ensure that SARS data is protected from unauthorised access and how is the possibility of breaches monitored.
- Disaster Recovery Plan – outline a high level disaster recovery plan and the anticipated downtime should a disaster happen from the bidder's side.

10. CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

Foreign Suppliers who have no presence in South Africa currently are not required to register on CSD however, should such entities be successful in winning the award; they will be expected to register on the Central Supplier Database. All other local suppliers or foreign suppliers that have local presence at the time of tendering are expected to abide by the following provisions. CSD can be accessed via the following link: <https://secure.csd.gov.za>

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 2015/16 – Central Supplier Database.

National Treasury maintains 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

11. INSTRUCTIONS TO BIDDER(S)

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

Brooklyn

Pretoria

- 11.2 Alternatively, bid documents may also be posted to the Tender Office - SARS Procurement Department, Linton House, Brooklyn Bridge, 570 Fehrsen Street, Brooklyn, Pretoria, 0181.
- 11.3 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. No electronic submission of bid documents is allowed.
- 11.4 Late bids will not be accepted.
- 11.5 The bidder(s) are required to submit two (2) copies of their file (original and duplicate) and one (1) USB with the contents of the file at the closing date and time.
- 11.6 Bidders file and USB must be marked correctly for ease of reference during the evaluation process.
- 11.7 The files and information in the USB must be labelled and submitted in the following format:

11.7.1 ARCH LIVER FILE 1

Exhibit 1

- Submit proof of Central Supplier Database (CSD) Registration Report (preferably the CSD report in PDF format) from National Treasury;
- Pre-qualification documents (SBD documents)
- General Conditions of Contract (GCC)
- Comments/inputs on the draft Master Service Level Agreement

Exhibit 2: Technical Responses

- Company profile and resources as per 9.3.1.
- References as per 9.3.2
- System Functionality as per 9.3.3
- Methodology and Approach as per 9.3.4
- User Support as per 9.3.5
- Data Security and Disaster Recovery as per 9.3.6

11.7.2 ARCH LIVER FILE 2

Exhibit 1

- B-BBEE Certificate
- SBD 6.1
- Pricing Template (**Annexure D**)

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

12. EVALUATION AND SELECTION CRITERIA

SARS has set minimum standards (Gates) that bidder(s) must meet in order to be evaluated and selected as a successful bidder. The minimum standards consist of the following:

- **Pre-Qualification Criteria (Gate 0)** – bidder(s) must submit all documents, as outlined in paragraph 12.1 below.
- **Technical Evaluation Criteria (Gate 1)** – Bidder(s) will be evaluated out of 100 points during the Presentation and Live Demonstration of the Job Design Tool. Bidders that achieved a minimum score of 70 points out of 100 will proceed to Gate 2. The process is outlined in paragraph 12.2 below.
- **Price and B-BBEE Evaluation (Gate 2)** – This will be evaluated out of 100 points. Price will be evaluated out of 80 points and B-BBEE out of 20 points. The process is outlined in paragraph 12.3 below.

12.1 PRE-QUALIFICATION CRITERIA – GATE 0

Without limiting the generality of SARS' other critical requirements for this bid, bidder(s) must submit the documents listed in **Table 12A** 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 listed documents.

Table 12A: Documents that must be submitted for Pre-qualification

Name of the document that must be submitted	Non-submission may result in disqualification
Invitation to bid – SBD 1	YES – Complete and sign the supplied pro forma document.
Tax Compliance status pin	YES – Submit Tax Compliance status pin
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. This is applicable to all local bidders and foreign bidders with a local presence.
Declaration of Interest – SBD 4	YES – Complete and sign the supplied pro forma document.
Preference Point Claim Form - SBD 6.1	YES – Complete and sign the supplied pro forma document.
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.
SARS' Oath of Secrecy:	YES – Bidders must complete and sign the supplied pro forma document in the presence of a Commissioner of Oaths and initial every page.
General Conditions of Contract (GCC)	YES – Sign the supplied GCC.
Supplier cost and risk assessment questionnaire	YES – Complete and sign the supplied pro forma document.
Bidder Compliance Checklist Form for Technical Evaluation (Annexure C)	No – Complete to assist with ease of reference during evaluation.

12.2 TECHNICAL EVALUATION (GATE 1) = 100 POINTS

Bidders will be evaluated in Gate 1 for functionality. Functionality will be evaluated as follows:

Presentation and live demonstration of the job design tool will be evaluated out of 100 points. Bidders are required to achieve the minimum threshold of 70 out of 100 points.

Bidders will be scored according to the points system in Table 12B.

Table 12B: Technical Evaluation Criteria for Presentation and Live Demonstration of Job Design Tool

No.	Technical Measure	Weight	RFP Ref.
1	CAPABILITY AS TO HOW THE BIDDER ENSURES THE BEST DELIVERY	12	
1.1	References	4	9.3.2
1.1.1	<p>The Bidders should provide in their response and present to SARS three (3) South African client references (Annexure A) not older than 36 months who have fully implemented the electronic Job design tool. Bidders should provide this information by completing Annexure A:</p> <p>3 references = 2 1-2 references = 1 No references = 0</p>	2	
1.1.2	<p>The aforesaid references must include the following details:</p> <ul style="list-style-type: none"> • The name of the company; • Size of company; • Contact Person; • Business address; • Phone numbers; • Duration of the contract; and • Brief description of the services provided. <p>Completed all required details = 2 Provided Incomplete details = 1 No details = 0</p>	2	
1.2	User Support	4	9.3.5
1.2.1	<p>Do you have representation in South Africa</p> <p>Yes = 1 No = 0</p>	1	
1.2.2	<p>Is there local support available for Southern African users</p> <p>Yes = 1 No = 0</p>	1	
1.2.3	<p>Does this include online and phone support services?</p> <p>If both = 2 If only 1 = 1 None = 0</p>	2	
1.3	Business Continuity	4	9.3.6
1.3.1	<p>Data Security plan submitted</p> <p>Yes = 2 No = 0</p>	2	

No.	Technical Measure	Weight	RFP Ref.
1.3.2	Disaster Recovery Plan submitted Yes = 2 No = 0	2	
2	FUNCTIONALITY REQUIREMENTS	80	9.3.3
2.1	Job Criteria	30	
2.1.1	Functionality can accommodate Levels of Work Yes = 2 No = 0	2	
2.1.2	The tool enables use of sublevelling to differentiate between Generalist/Specialist type jobs Yes = 2 No = 0	2	
2.1.3	The tool can accommodate the Job title field Yes = 2 No = 0	2	
2.1.4	The tool can accommodate the SAP Job code Yes = 2 No = 0	2	
2.1.5	The tool can accommodate the Job purpose description Yes = 2 No = 0	2	
2.1.6	The tool can accommodate the Job grade Yes = 2 No = 0	2	
2.1.7	The tool can accommodate the OFO code Yes = 1 No = 0	1	
2.1.8	The tool can accommodate Job families Yes = 2 No = 0	2	
2.1.9	The tool can accommodate experience requirements as stipulated in section 9.2.1.3 line 7 and 10 of the job attributes table. Accommodates both Minimum and alternative experience = 4 Accommodates only one type = 2 None = 0	4	
2.1.10	The tool can accommodate Occupational Category, Function and Level Yes = 1 No = 0	1	
2.1.11	The tool can accommodate Qualifications requirements as stipulated Accommodates both minimum and alternative qualifications = 4 Accommodates only one type = 2 None = 0	4	
2.1.12	The tool can accommodate Minimum functional requirements as stipulated Yes = 2 No = 0	2	
2.1.13	The tool can accommodate specific Qualifications and Experience requirements (IT Jobs) Yes = 2 No = 0	2	

No.	Technical Measure	Weight	RFP Ref.
2.1.14	Demonstrate how the tool supports data structures as described in section 9.3.3.2 of the main RFP document. Can accommodate requirements for free text, selection fields and field length = 2 Cannot accommodate all requirements = 0	2	
2.2	Competency library that aligns with the SARS competency structure	18	
2.2.1	Grouping by Competency type Yes = 2 No = 0	2	
2.2.2	Provision for competency name and short description Makes provision for both = 4 Makes provision for only one = 2 None = 0	4	
2.2.3	Provision for proficiency level indicator and label descriptor. Makes provision for both = 4 Makes provision for only one = 2 None = 0	4	
2.2.4	Provision for proficiency/behavioural indicators. Yes = 2 No = 0	2	
2.2.5	User can edit and add all attributes of competencies in the library. Yes = 2 No = 0	2	
2.2.6	Competencies can be linked to job families. Yes = 2 No = 0	2	
2.2.7	Competencies can be linked to Levels of Work. Yes = 2 No = 0	2	
2.3	Output Library	8	
2.3.1	Outputs can be linked to Levels of Work. Yes = 2 No = 0	2	
2.3.2	Outputs can be linked to Job Families. Yes = 2 No = 0	2	
2.3.3	Outputs can be grouped into multiple categories. Yes = 2 No = 0	2	
2.3.4	User can edit and add outputs to the library. Yes = 2 No = 0	2	
2.4	Job Profiling	16	
2.4.1	User can create new job profiles, edit existing and maintain published job profile information as required. Yes = 3 No = 0	3	

No.	Technical Measure	Weight	RFP Ref.
2.4.2	Utilisation of an auto populate function based on inheritance principles, that pre-populates profiles when common criteria are selected (e.g. Job Family, Levels of Work) Yes, all attributes = 4 Only one inherited attribute = 2 No = 0	4	
2.4.3	Provisioning of Job Profiles in a standardised format and layout Yes = 2 No = 0	2	
2.4.4	Audit trails of changes in data Yes, full audit trail with before and after content = 3 Yes, limited audit trail = 2 No = 0	3	
2.4.5	Job Profiles generated in Word and PDF format Yes, both formats = 2 Yes, one format only = 1 No = 0	2	
2.4.6	The tool supports workflow for quality checking of job profiles Yes = 2 No = 0	2	
2.5	Reporting	8	
2.5.1	End – user reporting capability Yes, reports on all job profile attributes= 2 Yes, users can create reports on a limited number of job attributes. = 1 No = 0	2	
2.5.2	Tool contains standards reports which shows relationships between attributes Yes = 2 No = 0	2	
2.5.3	Vendor created custom reports available on request Yes = 2 No = 0	2	
2.5.4	Reports can be exported to excel and PDF formats. Yes, both formats = 2 Only one format = 1 No = 0	2	
3	METHODOLOGY AND APPROACH	8	9.3.4
3.1	Implementation	8	
3.1.1	Has the bidder supplied an implementation methodology and approach? Yes = 2 No = 0	2	
3.1.2	Has the bidder provided a project plan for the implementation? Yes = 2 No = 0	2	
3.1.3	What is the estimated length of the implementation for full functionality? 1 month or less = 4 >1 month up to 2 months = 2	4	

No.	Technical Measure	Weight	RFP Ref.
	>2 months = 1		
TOTAL		100	

12.3 PRICE AND B-BBEE EVALUATION (GATE 2)

Stage 1 – Price Evaluation (80 Points)

- In the event that SARS, at its sole discretion, is of the opinion that a calculation error may have occurred on the bidder's Pricing Schedule, clarification will be sought from such bidder.

Table 12C: Price evaluation formula

Adjudication Criteria	Points
Price Evaluation $P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	80

Where

- P_s = Points scored for price of Bid under consideration
 P_t = Price of Bid under consideration
 P_{\min} = Price of lowest acceptable Bid

Table 12D: B-BBEE Evaluation (20 points)

Adjudication Criteria	Points
A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1) and a B-BBEE Certificate (B-BBEE Certificate and/or submission of SBD 6.1)	20

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.

Turnover	Classification	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

Turnover	Classification	Submission Requirement
		Registered Auditor approved by the Independent Regulatory Board for Auditors ("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 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 IRBA.

Bidders who do not claim Preference Points will be scored zero for BEE and cannot be excluded from the tender process.

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

- **Use and acceptance of Affidavits**

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 scorecard as if they were a group structure for every separate tender.

- **Sub-contracting**

Bidders who submit bids and intend sub-contracting a portion of the services will have to comply fully with regulation 12 of the Preferential Procurement Regulations, 2017 with regard to sub-contracting.

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.

- **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.

13. AGREEMENTS

13.1 GENERAL CONDITIONS OF CONTRACT

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

- 13.1.1 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.
- 13.1.2 The bidder submitting the General Conditions of Contract to SARS together with its bid, duly signed by an authorised representative of the bidder.

13.2 SERVICES AGREEMENT

- 13.2.1 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.

- 13.2.2 SARS reserves the right to vary the proposed terms and conditions of the draft Services

Agreement during the course of negotiations.

13.2.3 Bidders are requested to-

13.2.3.1 Comment on the terms and conditions set out in the draft Services Agreement and where necessary, propose required changes to such terms and conditions; and

13.2.3.2 Each comment and/or amendment must be explained.

13.2.4 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. For this reason, it is not required that the draft Services Agreement be signed on submission of the bidder's proposal.

13.3 **INSURANCE**

The successful bidder will be required, on or before the effective date of the Services Agreement and for the duration of the Agreement, to have and maintain in force adequate insurance cover consistent with acceptable and prudent business practices and acceptable to SARS, which shall include, without limitation, professional indemnity insurance cover.

13.4 **SPECIAL CONDITIONS OF THIS BID**

13.4.1 **SARS reserves the right:**

13.4.1.1 Not to award or cancel this bid at any time and shall not be bound to accept the lowest or any bid;

13.4.1.2 To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price and Best and Final Offer (BAFO);

To accept part of a bid rather than the whole bid;

13.4.1.3 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;

13.4.1.4 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; and

13.4.1.5 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.

13.4.2 SARS requires bidder(s) to declare:

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

Confirm that the bidder(s) shall:

- 13.4.2.1 Act honestly, fairly and with due skill, care and diligence, in the interests of SARS;
- 13.4.2.2 Have and employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- 13.4.2.3 Act with circumspection and treat SARS fairly in a situation of conflicting interests;
- 13.4.2.4 Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- 13.4.2.5 Make adequate disclosures of relevant material information, including disclosures of actual or potential own interests, in relation to dealings with SARS;
- 13.4.2.6 Avoid fraudulent and misleading advertising, canvassing and marketing;
- 13.4.2.7 Conduct their business activities with transparency and consistently uphold the interests and needs of SARS as a client before any other consideration; and
- 13.4.2.8 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.

13.4.3 Conflict of Interest, Corruption and Fraud

- 13.4.3.1 Act honestly, fairly and with due skill, care and diligence, in the interests of SARS;
- 13.4.3.2 Have and employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- 13.4.3.3 Act with circumspection and treat SARS fairly in a situation of conflicting interests;
- 13.4.3.4 Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- 13.4.3.5 Make adequate disclosures of relevant material information, including disclosures of actual or potential own interests, in relation to dealings with SARS;
- 13.4.3.6 Avoid fraudulent and misleading advertising, canvassing and marketing;
- 13.4.3.7 Conduct their business activities with transparency and consistently uphold the interests and needs of SARS as a client before any other consideration; and
- 13.4.3.8 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.

13.4.4 Bidder's Own Terms and Conditions or Bid Qualifications

This document contains the terms and conditions of this bid and bidders must not qualify the specifications or come up with their own terms and conditions. SARS reserves the right to disqualify a bid which seeks to modify or depart from the specified conditions.

13.4.5 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 a Services 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. In the event of a conflict between the bidder's proposal and the Services Agreement concluded between the parties, the Services Agreement will prevail.

13.4.6 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 bidder in the preparation of their response to this bid.

13.4.7 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.

13.4.8 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.

13.4.9 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.

13.4.10 Tax Compliance

No tender shall be awarded to a bidder whose tax matters have not been declared by the SARS to be in order. 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. 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.

13.4.11 National Treasury

No tender shall be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appears 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.

13.4.12 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 High 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.

13.4.13 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.

13.4.14 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' 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' 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.

13.4.15 Intellectual Property Rights

Subject to pre-existing intellectual property rights of the bidder and/or any third party, all intellectual property right to literary works created in the course of executing the services contemplated in this RFP shall vest exclusively in SARS. By bidding, bidders irrevocably agree to transfer, make over and assign to SARS such relevant intellectual property rights.

13.4.16 SARS Proprietary Information

On their bid covering letter, bidder(s) will make a 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.

13.4.17 Screening and Vetting of Service Provider

Acceptance of this tender is subject to the condition that both the contracting firm and its personnel providing the service must be screened and cleared by the appropriate authorities to the grade of clearance in line to classified information, intelligence in the possession of SARS and areas designated as National Key points that they may have. Obtaining a positive recommendation is the responsibility of the contracting firm concerned. If the principal contractor appoints a subcontractor, the same provisions and measures will apply to the subcontractor.