

Request for Proposals (RFP)

For Conducting Employee Climate Survey at the CSIR.

RFP No. 3449/06/05/2021

Date of Issue	Wednesday, 21 April 2021	
Closing Date	06 May 2021	
Enquiries	Strategic Procurement Unit	E-mail: tender@csir.co.za
CSIR business hours	08h00 - 16h30	

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SECTION A – TECHNICAL INFORMATION

1 INTRODUCTION

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. In partnership with national and international research and technology institutions, CSIR undertakes directed and multidisciplinary research and technology innovation that contributes to the improvement of the quality of life of South Africans. The CSIR's main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

2 BACKGROUND

Time and again, results from employee feedback surveys show that staff who are involved in and enthusiastic about their work are also the most productive. They take a real interest in their job, the business and they go the extra mile. Organisations benefit greatly from understanding how employees feel about important topics such as their level of workload, management structures, their sense of achievement, fair treatment in the workplace, management communications, job security and career path. All of these issues have a direct impact on motivation and performance and over all employee engagement.

It is to this end that the CSIR would like to engage a consultant to undertake a Climate survey in the organisation. This is to enable the CSIR to take stock of what employees think and how they are feeling and assess ways to help increase an employees' sense of inclusion and wellbeing to boost productivity. This Climate Survey is being undertaken to give employees an opportunity to engage with management as a way of contributing towards the CSIR people strategy as well as a feedback mechanism and enhance management understanding of what is important to the CSIR's employee.

3 INVITATION FOR PROPOSAL

Proposals are hereby invited for Conducting of Employee Climate Survey at the CSIR. The project should not take more than thirty (30) days to complete.

4 PROPOSAL SPECIFICATION

All proposals are to be submitted as specified in this document.

4.1 Technical Proposal

The following must be submitted as part of the **technical** proposal:

The Proposal should include:

- a) An executive summary;
- b) A summary of the Vendor's understanding of the requirements and strengths of the proposed approach;
- A description of the relevant qualifications and experience of the vendor implementing similar assignments in other similar organizations;
- d) References for five similar initiatives successfully implemented and managed with proven and measured success by the vendor within the last five years;
- e) A description of the proposed overall approach and methodology including:
 - i. Engagement tool(s) details on the tool(s) being recommended for use including such detail as optimal use, frequency of use, whether it can be customized, reviews from other users, precision in predicting workplace trends and method of evaluation, etc.;
 - ii. Evaluation of results and action planning describe the evaluation methodology and approach to building a successful action plan for an organization to address results;
 - iii. Overall project work plan outlining the proposed first cycle for the CSIR's implementation of the tool(s) to accompany the Project Deliverables and milestones:
- f) A description of the proposed project team or individual who will manage the project with the CSIR;
- q) Names and resumes of the individual or proposed project team members;
- h) Two references for each proposed individual demonstrating relevant experience for the proposed role within the last three years; and
- i) Financial proposal (presented separate from the technical proposal).

4.2 Scope of Service

The service provider is expected to carry out an independent comprehensive Climate survey across the CSIR covering all our offices. The survey will be conducted online and should,

among other things, be designed in a manner so as to elicit the feedback of employees on the effectiveness of various Human Capital practices/policies, people management, overall organisational leadership, change management processes, values and culture.

The climate survey results should also provide some valuable analysis of responses by demographics such as age, gender, ethnicity and disability. The analysis should also be able to demarcate/segment the data according to different functional/departmental areas and job levels. The service provider should package these results in a way which will enable management to pinpoint areas for priority development.

4.3 Deliverables

The CSIR requires the following deliverables:

- a) Survey design and administration, Creation of Survey Questionnaire Format that is repeatable by CSIR in future years;
- b) Climate Survey Tool;
- c) Together with the CSIR Strategic Communications department, Design Communication Collateral;
- d) The CSIR employee should be able to assess at the Line manager level, Cluster level, Divisional level and the CSIR level with the reports showing such a picture for improvements at each level;
- e) Collating the resulting data in a way that maximises its efficacy and gives the most insight to management;
- f) Survey Report with detailed analysis of the various area of the business. The service provider will arrange for analysis of the survey data and provide survey analysis on various parameters as required by the CSIR.
- g) The service provider will be required to ensure transfer of skill to the CSIR's Organisational Effectiveness and Development team;
- h) Prepare a dashboard to track the health of the organisation based on data;
- Presentation to the Extended leadership team on the results and implications of the Survey;
- j) Benchmarking on data and practices against results from similar Research,
 Development and Innovation (RD&I) organizations;
- k) Recommendations to the leadership team on key areas of improvement based on the
- engagement survey results and potential areas of linkage of engagement to the

- m) broader talent and the CSIR strategy;
- n) Recommendations on employee engagement initiatives and ideas; and
- based on the data analysis and survey results, the service provider will present a 6 to
 months' roadmap of interventions.

5 FUNCTIONAL EVALUATION CRITERIA

5.1 The evaluation of the functional / technical detail of the proposal will be based on the following criteria:

Evaluation	Description	Weight
Criteria		
Technical	Qualification and Experience of Organization and Team	30
	 Qualifications and experience working with organizations to design custom employee engagement strategies to assess and build a positive employee engagement culture. Experience includes developing, implementing and evaluating engagement tool(s) for organizations that successfully meet the needs of the client organization. Qualifications and experience of lead individual or proposed 	
Technical	project team working on projects of a similar nature. Proposed Approach, Engagement Tools and Plan	50
	 Assessment of the engagement tool(s) and Climate survey approach. Completeness and quality of the proposed approach, work plan and schedule to complete the work including the preparation and launch of the program and the framework for evaluating results and creating appropriate report. Plan to validate and evaluate the employee engagement program. 	
Value Adds	New/innovative and value added approaches to service delivery	10
	 Vendor to provides post survey support, several modes or sources of data collection and various innovative service delivery approaches. 	
References		10
	 The company must have not less than 5 references where employee climate survey assignments were successfully undertakes in organisations of a similar stature/nature to CSIR, in the past 5 years 	
Total		100

- **5.2** Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 70% and less than 50% on any of the individual criterion will be eliminated from further evaluation.
- **5.3** Refer to Annexure "A" for the scoring sheet that will be used to evaluate functionality.
- **5.4** Successful bidders who pass functional /technical evaluation may be requested to carry out presentations of their proposals and also demonstrate functionalities of the proposed tools.

6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the closing date;
- Proposals not submitted in accordance with this document;

7 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION AND TAX CLEARANCE CERTIFICATE

Before any negotiations will start with the winning bidder it will be required from the winning bidder to:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: www.csd.gov.za;
- provide the CSIR of their CSD registration number; and
- have its tax affairs in good standing with the South African Revenue Service (SARS).

Failure to register on the National Treasury's Central Supplier Database or resolve tax affairs within a period of 7 (seven) days following request to do so will lead to elimination.

SECTION B – TERMS AND CONDITIONS

8 PROCEDURE FOR SUBMISSION OF PROPOSALS

- **8.1** All proposals must be submitted electronically to tender@csir.co.za
- **8.2** Respondents must use the RFP number as the subject reference number when submitting their bids.
- **8.3** The e-mail and file sizes should not exceed a total of 30MB per e-mail.
- 8.4 The naming/labeling syntax of files or documents must be short and simple
- **8.5** All documents submitted electronically via e-mail must be clear and visible.
- **8.6** All proposals, documents, and late submissions after the due date and time will not be evaluated.
- **8.7** Proposals submitted by companies must be signed by a person or persons duly authorised to do so.

NB: NO HARD COPIES OR PHYSICAL SUBMISSIONS WILL BE ACCEPTED

9 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of *Thursday, 06 May 2021* by 16h30.

Where a proposal is not received by the CSIR by the due date and stipulated place, it will be regarded as a late tender. Late tenders will be disqualified.

10 TENDER PROGRAMME

The tender program, as currently envisaged, incorporates the following key dates:

Issue of tender documents: 21 April 2021
Last date for submission of queries: 29 April2021
Closing / submission Date: 06 May 2021

11 AWARDING OF TENDERS

11.1 Awarding of tender will be published on the National Treasury e-tender portal or the CSIR's tender website. No regret letters will be sent out.

12 EVALUATION PROCESS

12.1 Evaluation of proposals

All proposals will be evaluated by an evaluation team for functionality, price and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of contract to the successful tenderer.

A two-phase evaluation process will be followed.

- The first phase includes elimination of tenders based on the elimination criteria and evaluation on functionality requirements, local production and content, if applicable.
- The second phase includes the evaluation of tenders based on price and B-BBEE status.

Pricing Proposals will only be considered after functionality phase has been adjudicated and accepted. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

12.2 Preference points system

The 80/20 preference point system will be used where 80 points will be dedicated to price and 20 points to B-BBEE status.

13 PRICING PROPOSAL

- **13.1** Pricing proposal must be cross-referenced to the sections in the Technical Proposal.
- 13.2 Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.
- **13.3** Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.
- 13.4 Only firm prices* will be accepted during the tender validity period. Non–firm prices** (including prices subject to rates of exchange variations) will not be considered.

*Firm price is the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax which, in terms of a law or regulation is binding on the contractor and

demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract:

**Non-firm price is all prices other than "firm" prices.

13.5 Payment will be according to the CSIR Payment Terms and Conditions.

14 VALIDITY PERIOD OF PROPOSAL

Each **proposal** shall be valid for a minimum period of three (3) months calculated from the closing date.

15 APPOINTMENT OF SERVICE PROVIDERS

- **15.1** The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- **15.2** Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement CSIR reserves the right to appoint an alternative supplier.
- **15.3** Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

16 ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry regarding this RFP shall be submitted in writing to CSIR at tender@csir.co.za with "RFP No 3449/06/05/2021 – Conducting Employee Climate Survey at the CSIR" as the subject.

Any other contact with CSIR personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by the CSIR as part of the RFP process.

17 MEDIUM OF COMMUNICATION

All documentation submitted in response to this RFP must be in English.

18 COST OF PROPOSAL

Tenderers are expected to fully acquaint themselves with the conditions, requirements and specifications of this RFP before submitting proposals. Each tenderer assumes all risks for resource commitment and expenses, direct or indirect, of proposal preparation and participation throughout the RFP process. The CSIR is not responsible directly or indirectly for any costs incurred by tenderers.

19 CORRECTNESS OF RESPONSES

- **19.1** The tenderer must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.
- **19.2** The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

20 VERIFICATION OF DOCUMENTS

- **20.1** Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.
- **20.2** Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

21 SUB-CONTRACTING

- 21.1 A tenderer will 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.
- 21.2 A tenderer 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.
- 21.3 Where the tenderer intends to sub-contract a portion of the contract, the capabilities of the subcontractor will be evaluated in accordance with the criteria defined in the RFP. The

tenderer must provide a sub-contract agreement indicating the split of work and duly signed by parties thereto.

22 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

- **22.1** Determined in the "Guideline for fees", issued by the South African Institute of Chartered Accountants (SAICA); or
- **22.2** Set out in the "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or
- **22.3** Prescribed by the body regulating the profession of the consultant.

23 ADDITIONAL TERMS AND CONDITIONS

- **23.1** A tenderer shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.
- **23.2** Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- **23.3** In case of proposal from a joint venture, the following must be submitted together with the proposal:
 - Joint venture Agreement including split of work signed by both parties;
 - The original or certified copy of the B-BBEE certificate of the joint venture;
 - The Tax Clearance Certificate of each joint venture member;
 - Proof of ownership/shareholder certificates/copies; and
 - Company registration certificates.
- 23.4 An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.
- **23.5** Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

24 CSIR RESERVES THE RIGHT TO

- **24.1** Extend the tender validity period;
- **24.2** Verify any information contained in a proposal;
- **24.3** Request documentary proof regarding any tendering issue;
- **24.4** Give preference to locally manufactured goods;
- 24.5 Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
- 24.6 Award this RFP as a whole or in part;
- **24.7** Cancel or withdraw this RFP as a whole or in part.

25 DISCLAIMER

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. The CSIR makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

DECLARATION BY TENDERER

Only tenderers who completed the declaration below will be considered for evaluation.

RFP No: 3449/06/05/2021

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in **RFP**No. 3449/06/05/2021 at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with regards to the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have no participation in any collusive practices with any tenderer or any other person regarding this or any other proposal.

I accept that the CSIR may take appropriate actions, deemed necessary, should there be a conflict of interest or if this declaration proves to be false.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT)	WITNESSES NAME AND SIGNATURE
CAPACITY	1
SIGNATURE	
NAME OF FIRM	2
DATE	DATE:

26 ANNEXURE A – FUNCTIONALITY SCORING

No.	Criteria	Proof required	Points allocation	Weight
1	Qualification and Team Experience: The team must have a demonstrated experience, in successfully managing employee climate survey assignments in organisations similar to the CSIR (government, research councils, private sector or parastatals). The team leader must have not less than 5 years' experience in managing employee climate survey assignments. Experience in working with organisations similar in nature to the CSIR in the past 5 years with successful employee climate survey interventions would be a strong advantage. The survey designer must have not less than 5 years' experience in designing custom employee surveys and should hold a BA Psychometry or equivalent at a minimum.	CV of survey designer and lead individual explicitly indicating the number of years each has been providing employee climate survey services and to which organisations. Level of experience of leader clearly articulated. Experience to include developing, implementing and evaluating engagement tool(s) for organizations that successfully meet the needs of the client organization. Examples of success stories demonstrating experience and successful outcomes. Qualification(s) of survey designer must be indicated.	 O points - survey designer no experience in managing employee climate survey assignments. 3 points - survey designer has less than five years' experience in managing employee climate survey assignments. 5-points- survey designer has five —seven years' experience in managing employee climate survey assignments. 10 points- survey designer has eight - ten years' experience in managing employee climate survey assignments O points — Team leader has no experience in managing employee climate survey assignments. 3 points — Team leader has less than five years' experience in managing employee climate survey assignments. 5 points - Team leader has five —seven years' experience in managing employee climate survey assignments. 10 points - Team leader has eight - ten years' experience in managing employee climate survey assignments. 	30%

			O-points - Survey designer is not a qualified Psychometrist or equivalent 5-points - Survey designer is a qualified Psychometrist or equivalent 10-points - Survey designer holds a BA Psychometry and higher	
2	Proposed Approach, Engagement Tools and Plan The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. An in-depth understanding of the CSIR and its role and mandate is required. A detailed approach, methodology and tools on how they will assist CSIR in achieving the objectives of this request, must be provided, including an outline of the project deliverables, indicating key milestones and turnaround times. Detailed costing is critical.	Detailed Methodology, Approach and Gantt Chart/time line Methodology to provide for • the engagement tool(s) and Climate survey approach. • Completeness and quality of the proposed approach, work plan and schedule to complete the work	O points - Non-submission or proposal does not address the scope of the assignment 5 points - Approach is very generic. The bidder's proposal addresses and meets minimum or basic project requirements. The work plan and timeframes meet the requirements of the assignment; the sequencing of activities indicate the bidder understand the requirements. 7 points - Approach is specifically tailored to suit the CSIR's employee survey requirements. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities demonstrate that the bidder clearly understand the requirements and has a good understanding of the needs of the CSIR.	50%

		 preparation and launch of the program, the framework for evaluating results and creating appropriate report. Plan to validate and evaluate the employee engagement program 	10 points -The approach is innovative and more than exceeds the expectations of the CSIR. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder has an excellent or demonstrated in-depth understanding of the requirements of the CSIR.	
3	Value Adds	Vendor provides post survey support, several modes or sources of data collection and various innovative service delivery approaches	O points - bidder failed to provides any value add services 5 points - Proposed value adds meets CSIR's expectations 10 points - bidder proposed innovative value adds which more than exceeds the expectations of the CSIR	10%
4	References The company must have not less than 5 references where employee climate survey assignments were successfully undertakes in organisations of a similar stature/nature to CSIR, in the past 5 years	 Reference Letters, with the following information as a minimum Client Contact Person Contact Number Email 	 0 points - < 5 references 5 points - 5 - 6 references 7 points - 7 - 8 references 10 points - >8 references 	10%
	Total			100%

27 ANNEXURE B RETURNABLE CHECKLIST

NOTE: The bidder is required to complete each and every schedule listed below to the best of his ability as the evaluation of tenders and the eventual contract will be based on the information provided by the bidder. Failure of a bidder to complete the schedules and forms to the satisfaction of the CSIR will inevitably prejudice the tender and may lead to rejection on the grounds that the tender is not responsive.

The bidder must complete the following returnable documents:

RETURNABLE DOCUMENTS –		
PART A: TECHNICAL RETURNABLES		
Description	Included	
	Yes	No
Qualification and Team Experience		
CV of lead individual and survey designer		
Company References – (Client reference letters)		
The service provider must provide evidence that they have successfully Provided psychometric assessment services. At least five (5) references to be supplied		
No letters from other service providers or award letters will be accepted		
as these do not elaborate on bidder's workmanship and work ethic.		
Reference letters must be provided to substantiate such claims or the reference form, Annexure C MUST be completed for each reference provided.		
Methodology and Approach including Work plan/timelines – (Detailed Methodology, Approach and Gantt Chart)		
The service provider must explain their understanding of the objectives of the assignment, approach to the assignment and the methodology for carrying out the assignment. The main activities of the assignment, their content and duration, phasing and interrelations, milestones, and delivery dates of the reports.		

PAR	TB: PRICING PROPOSAL	
32	Pricing Proposal	
33	B-BBEE Certificate	
34	Completed SBD1 Form	

Any other relevant document may be submitted, to substantiate the bidder's proposal.

28 ANNEXURE C REFERENCE FORM

It is critical for the referee to complete the form fully. CSIR will not give scores for incomplete forms

Referee Company legal Name:							
Bid Description (reference provided for):							
Describe the service/work done:							
Project Start Date	e:		Project End D	ate:			
Contract Amount	:						
Rate Service Prov	ider (Put a mark	to the relevant so	ore)				
Indicator	Excellent	Very good	Good	Poor	Unacceptable		
Score	5	4	3	2	1		
				_			
				_			
Would you use th	ne service provide	er again: Yes /	/ No	_			
Would you use th		er again: Yes /	/ No				
	Person:	er again: Yes ,	/ No				
Referee Contact F	Person:	er again: Yes	/ No				
Referee Contact F	Person:	er again: Yes	/ No				
Referee Contact R Referee Designation	Person:	er again: Yes	/ No				
Referee Contact R Referee Designati Referee Contact r Referee Email:	Person: ion: number:				and correct		
Referee Contact R Referee Designation	Person: ion: number:				e and correct.		
Referee Contact R Referee Designation Referee Contact r Referee Email:	Person: ion: number: hat to the best of				e and correct.		
Referee Contact R Referee Designati Referee Contact r Referee Email:	Person: ion: number: hat to the best of		nformation compl	eted above is true			

29 ANNEXURE D - PRICING SCHEDULE

No.	Service Components	Unit of	Quantity	Price / Rate	Price / Rate		
		Measure		(Excl. VAT	(Incl. VAT)		
	Survey design and						
1.	administration	Each	1				
2.	Report compilation	Each	1				
3.	Skill transfer (training)	Sum	1				
4.	Travel	Km					
	NB: Pricing must be inclusive of all costs to be incurred by the bidder in the delivery of the required services.						
				Sub-total			
				VAT			
				Total			

30 ANNEXURE E SBD1 FORM