Request for Proposals (RFP)

The Development of a Human Capital (HC) Strategy and Design of the HC Operating Model for the CSIR

RFP No. 3169/19/01/2018

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<thead>
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<th>Date of Issue</th>
<th>Friday, 05 January 2018</th>
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<tr>
<td>Compulsory Briefing Session</td>
<td>Wednesday, 10 January 2018</td>
</tr>
<tr>
<td>Venue</td>
<td>CSIR Building 22, Central Station</td>
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<td>Time</td>
<td>10:00 to 11:30</td>
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<td>Closing Date</td>
<td>Friday, 19 January 2018</td>
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<tr>
<td>Place</td>
<td>Tender box, CSIR Main Reception, Gate 3 (North Gate)</td>
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<tr>
<td>Enquiries</td>
<td>Strategic Procurement Unit, E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a></td>
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<tr>
<td>CSIR business hours</td>
<td>08h00 – 16h30</td>
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<tr>
<td>Category</td>
<td>Professional Services</td>
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SECTION A – TECHNICAL INFORMATION

1 INTRODUCTION

The Council for Scientific and Industrial Research (CSIR) is a South African research and technology organisation formed in 1945 and later constituted as a science council by the Scientific Research Council Act (Act 46 of 1988, as amended by Act 71 of 1990). In terms of the Act, the mandate or objects of the CSIR are:

“through directed and particularly multi-disciplinary research and technological innovation, to foster, in the national interest and in fields which in its opinion should receive preference, industrial and scientific development, either by itself or in co-operation with principals from the private or public sectors, and thereby to contribute to the improvement of the quality of life of the people of the Republic, and to perform any other functions that may be assigned to the CSIR by or under this Act”

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. The CSIR’s main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

The CSIR is currently in the process of developing a Human Capital (HC) Strategy and HC Operating Model that is aligned to the business strategy. The CSIR therefore wishes to partner with suitably qualified strategy development firms who are able to identify the HC Strategy design needs suitable for a Research and Development (R&D) and innovation based organisation. The CSIR is currently developing its organisational strategy with emphasis on industrial development, where the thrust of the organisation is to build on its research and development base to drive research translation to improve South Africa’s economic performance. The successful service provider will need to:

- understand the current and emerging talent needs of the organisation;
- design the required HC operating environment;
- develop a service delivery operating model that is cost effective and agile to adapt to the dynamic business environment; and
- Develop a sustainable HC Strategy Framework.
2 BACKGROUND

The CSIR operates in a niche space as a scientific research council where ground breaking research and innovation are conducted in a wide variety of sectors both in the public and private sector. The CSIR employs a wide selection of specialised technologists, scientists and engineers in the higher stratum of the skills pool in South Africa. The CSIR’s present context is shaped by the need to foster deeper partnerships with industry in order to drive economic development through innovation, and stiff competition for specialist skills in most of its fields of operation. It is with this background, that the CSIR is looking to reposition its Human Capital by developing a strategy that addresses the immediate needs of the organisation with the agility and foresight of the changing business landscape.

3 INVITATION FOR PROPOSAL

Proposals are hereby invited from suitably qualified and experienced strategy development organisations, in the Human Capital domain, with adequate knowledge of R&D organisations to partner with CSIR on the Human Capital Strategy development and HR Operating Model as set out in paragraph 4 hereunder.

The proposal must be inclusive of all costs including travelling and accommodation. These costs must be in line with the CSIR's travel policy (Refer to Section 24 of this RFP)

4 PROPOSAL SPECIFICATION

The RFP specifications are detailed below and the evaluation process will be based on the criteria set out in section 5 (evaluation process and criteria).

All RFPs are to be submitted in a format specified in this document (as applicable).

4.1 The strategy development firm is expected to:

Conduct research (assignments) of similar organisations in South African and internationally to thoroughly understand the unique nature of a knowledge organisation and the talent management challenges in this domain to then formulate a fit for purpose;

1. Human Capital Strategy, that will enable a responsive, agile and efficient value offering premised on excellent service delivery to the internal clients; and the
2. HR Operating Model.

This will include the following:

- **Business Needs Analysis** – the service provider must ensure that they understand the CSIR operating model, the unique operations of the Operating Units and the overall (technical and support) talent needs for the organisation;

- **HC Portfolio Review** – the service provider must ensure an in-depth analysis and understanding of the existing human capital portfolio including the operating model, capability and capacity to design a comprehensive Human Capital Strategy with a multi talent segmented model for the needs of the organisation;

- **HC Strategy** – development of a sustainable forward looking strategy that is informed by the internal CSIR HC dynamics and business strategies, relevant national strategies and legislation;

- **HC Operating Environment** – the service provider needs to align the strategy with prevailing South African Legislation and existing or desired internal policies;

- **HC Operating Model** – it would be important that the service provider designs a fit for purpose HC Operating Model, including centres of excellence which will capacitate the CSIR with all the required capabilities to meet the needs of the organisation;

- **Agile Project Management** – the service provider must have knowledge and experience of agile project management methodologies;

- **Project Implementation** – the service provider must furnish the CSIR with a detailed roadmap for the implementation of the new HC strategy and Operating Model, providing practical insights including effective change management guidelines; and

- Weekly progress reports to the CSIR.

### SPECIFIC DELIVERABLES

#### 4.1.1 HR Strategy

**Purpose**

- Analyse the existing HC Strategic offering in line with the business strategy; and

- Identify the HC portfolio gaps against the current and emerging business needs.

**Outcome/Deliverable**

- Delivery of a detailed HC Strategy that responds optimally to CSIR’s mandate and business strategy.
4.1.2 HC Operating Model As Is Analysis

Purpose
- As-Is analysis of the HC Operating Model in relation to the overall talent needs of the organisation;
- Definition of expectations from future model in light of the organisation’s emerging strategy; and
- Understand the current HC capabilities, systems and processes.

Outcomes/Deliverables
- Current state and desired future state Operating Model;
- Clearly defined HC value proposition; and
- Detailed understanding of as-is HR operations.

4.1.3 HC Operating model design

Purpose
- Define the appropriate Operating Model required to deliver the desired value proposition that services all Talent segments.

Outcomes/Deliverables
- New Operating model design; and
- High level business case.

4.1.4 Define the New Talent Ambitions

Purpose
- Identify the current and future business context and implications for the CSIR;
- Predict talent needs over the coming years, and implications on actions today; and
- Align leaders on the desired future state.

Outcomes/Deliverables
- Shared definition of talent imperatives to achieve mission, vision and strategies; and
- View of employee experience required to achieve talent ambitions.

4.1.5 Prioritise talent initiatives and roadmap

Purpose
- Identify clear talent development priorities (what); and
- Identify clear actions to develop the talent and achieve future state (how).
Outcomes/Deliverables

- Blueprints of initiatives to realize talent imperatives and achieve business strategy and desired employee experience; and
- Prioritised roadmap to implement talent initiatives.

4.1.6 Project Implementation Plan and Roadmap

Purpose

- Identify the critical activities required for the successful implementation of the new HC strategy and the HC Operating Model.

Outcomes/Deliverables

- HR Strategy and Operating Model implementation roadmap, identifying resourcing and critical actions required for implementation; and
- Identify, quick win no regret actions required for immediate implementation.
5 FUNCTIONAL EVALUATION CRITERIA

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

<table>
<thead>
<tr>
<th>No</th>
<th>Evaluation criteria</th>
<th>Weighted score</th>
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<tbody>
<tr>
<td>1</td>
<td>Company Experience – References where similar (comparable to the CSIR in nature of work, size and complexity) assignments were conducted by the Company for technology intensive research organisations.</td>
<td>30</td>
</tr>
<tr>
<td>2</td>
<td>Experience of resources to be assigned to the project. The team must have adequate HR Experience and exposure to HR dynamics in research, technology and innovations organisations. The service provider should propose and justify the structure and composition of the team.</td>
<td>35</td>
</tr>
<tr>
<td>3</td>
<td>Methodology and Approach including Work plan/timelines</td>
<td>35</td>
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</table>

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. The proposed work plan should be consistent with the approach and methodology.

Total 100

5.1 Shortlisted bidders may be invited for presentations and shall be notified thereof no later than 4 (four) days before the actual presentation date.

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 criteria will be eliminated from further evaluation.

5.3 Refer to Annexure A for the scoring sheet that will be used to evaluate functionality.

6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Non-attendance of the compulsory briefing session; and
- Proposals submitted at incorrect location.
7 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

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 with their CSD registration number; and
- provide the CSIR with a certified copy of their B-BBEE certificate. If no certificate can be provided, no points will be scored during the evaluation process. (RSA suppliers only).
SECTION B – TERMS AND CONDITIONS

8 VENUE FOR PROPOSAL SUBMISSION

All proposals must be submitted at:

- **CSIR GATE 03 - Main Reception Area** (in the **Tender box**) at the following address
  Council for Scientific and Industrial Research (CSIR)
  627 Meiring Naudé Road
  Brummeria
  Pretoria

9 TENDER PROGRAMME

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

- Issue of tender documents: **Friday, 05 January 2018**
- Compulsory Briefing Session: **Wednesday, 10 January 2018**
- Last date for submission of queries: **Monday, 15 January 2018**
- Closing / submission Date: **Friday, 19 January 2018**
- Estimate appointment date of successful tenderer: **February 2018**

10 SUBMISSION OF PROPOSALS

10.1 All proposals are to be sealed. No open proposals will be accepted.

10.2 All proposals are to be clearly marked with the RFP number and the name of the tenderer on the outside of the main package. Proposals must consist of two parts, each of which is placed in a separate sealed package clearly marked:

**PART 1:** Technical Proposals **RFP No.: RFP No. 3169/19/01/2018**

**PART 2:** Pricing Proposal, B-BBEE and other Mandatory Documentation:

**RFP No.: 3169/19/01/2018**

10.3 Proposals submitted by companies must be signed by a person or persons duly authorised.

10.4 The CSIR will award the contract to qualified tenderer(s)’ whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price and B-BBEE.

11 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of **Friday, 19 January 2018** during CSIR’s business hours. The CSIR business hours are between 08h00 and 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 not be considered.
12 AWARDING OF TENDERS

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

13 EVALUATION PROCESS

13.1 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 the contract to successful tenderers.

A two-phase evaluation process will be followed.

- The first phase includes evaluation of elimination and functionality criteria.
- The second phase includes the evaluation of 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.

13.2 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_

14 PRICING PROPOSAL

14.1 Pricing proposal must be cross-referenced to the sections in the Technical Proposal. Any options offered must be clearly labelled. Separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.

14.2 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.

14.3 Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.

14.4 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.

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

15 VALIDITY PERIOD OF PROPOSAL

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

16 APPOINTMENT OF SERVICE PROVIDER

16.1 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.

16.2 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.

16.3 Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

17 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 3169/19/01/2017 - The Development of a Human Capital (HC) Strategy and Design of the HC Operating Model for 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.

18 MEDIUM OF COMMUNICATION

All documentation submitted in response to this RFP must be in English.
19 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.

20 CORRECTNESS OF RESPONSES

20.1 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.

20.2 The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

21 VERIFICATION OF DOCUMENTS

21.1 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.

21.2 ONE HARD COPY AND ONE ELECTRONIC COPY (CD OR USB MEMORY KEY) of each proposal must be submitted. In the event of a contradiction between the submitted copies, the hard copy shall take precedence.

21.3 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.

21.4 If a courier service company is being used for delivery of the proposal document, the RFP description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered to the tender box, by the stipulated due date.

22 SUB-CONTRACTING

22.1 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.
22.2 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.

23 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

23.1 Determined in the "Guideline for fees", issued by the South African Institute of Chartered Accountants (SAICA); or

23.2 Set out in the "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or

23.3 Prescribed by the body - regulating the profession of the consultant.

24 TRAVEL EXPENSES

24.1 All travel expenses for the CSIR’s account, be it directly via the CSIR’s travel agent or indirectly via re-imbursements, must be in line with the CSIR’s travel policy. The following will apply:

24.1.3 Only economy class tickets will be used.

24.1.4 A maximum of R1300 per night for accommodation, dinner, breakfast and parking will be allowed.

24.1.5 No car rentals of more than a Group B will be accommodated.

25 ADDITIONAL TERMS AND CONDITIONS

25.1 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.

25.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

25.3 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.
25.4 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.

25.5 Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

26 CSIR RESERVES THE RIGHT TO

26.1 Extend the closing date;
26.2 Verify any information contained in a proposal;
26.3 Request documentary proof regarding any tendering issue;
26.4 Give preference to locally manufactured goods;
26.5 Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
26.6 Award this RFP as a whole or in part; and
26.7 Cancel or withdraw this RFP as a whole or in part.

27 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: 3169/19/01/2018

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. 3169/19/01/2018 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) ……………………………
CAPACITY ……………………………
SIGNATURE ……………………………
NAME OF FIRM ……………………………
DATE ……………………………

WITNESSES

1 ……………………………
2 ……………………………
DATE: ……………………………
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<tr>
<th>No.</th>
<th>Criteria</th>
<th>Proof required</th>
<th>Points allocation</th>
<th>Weight</th>
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<tr>
<td>1</td>
<td>Company Experience</td>
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<td></td>
<td>- References where similar (comparable to the CSIR in nature of work, size and complexity as well as appreciation of both the South African and global Contexts) assignments were conducted. The details of the assignment must be clearly stipulated in the letter.</td>
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<td>Client reference letters</td>
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<td>Verified client references</td>
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<td>No references/irrelevant</td>
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<td>4 - 6</td>
<td>– 7 points</td>
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<td>&gt;6</td>
<td>– 10 points</td>
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<td>Experience of resources to be assigned to the project. The team must have adequate HR Experience.</td>
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<td>- The service provider should propose and justify the structure and composition of the team.</td>
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<td></td>
<td>- Minimum requirements for the team.</td>
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<td></td>
<td>- Experience in Human Capital Strategy Development;</td>
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<td>- Advanced knowledge of the Human Capital function and operating models, including the specialists domains, i.e. talent management, remuneration, etc.; and</td>
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<td>- Proposed Structure</td>
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<td>- Staff CVs, detailing qualifications, years of experience in conducting similar assignments and details of such assignments</td>
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</table>

The bidder's proposed team structure will not meet the assignment requirements. The structure is sketchy, the staffing plan is weak in important areas. The bidder has not adequately demonstrated ability to provide sufficient resources to manage the assignment effectively and efficiently – 0 points

The bidder’s proposed team structure will adequately meet the assignment requirements. The staffing plan is complete and detailed, the level and composition of the staffing arrangements are adequate and staffing is consistent with both assignment requirements. The bidder has sufficient resources to deliver as per requirements – 5 points

The bidder's proposed team structure will adequately meet the assignment requirements. The staffing plan is complete and detailed, the level and composition of the staffing arrangements are adequate and staffing is consistent with both assignment requirements. The team members have
Knowledge of agile project management i.e. new age project management. **Minimum 5 – 8 years is required for the team leader for similar assignments**

- The bidder has some experience in working in R&D and innovation intensive organisations. The team shows good complimentary skills, clear and defined duties and responsibilities. The bidder has sufficient resources to deliver as per requirements – **7 points**

The bidder's proposed team structure will adequately meet the assignment requirements. The staffing plan is complete and detailed, the level and composition of the staffing arrangements are adequate and staffing is consistent with both assignment requirements. The bidder has extensive necessary resources successfully deliver on the assignment as required. The team members have some experience in working in R&D and innovation intensive organisations. The proposed team is well integrated and several members have worked together extensively in the past – **10 points**

| 3 | Methodology and Approach including Work/ Project plan |
|-----------------------------------------------|
| - 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. The proposed work/project plan should be consistent with the approach and methodology. |

**Detailed Methodology, Approach and Gantt Chart**

- Non-submission – **0 points**
- Approach is generic – **5 points**

- Approach is specifically tailored to suit the requirements and will meet the needs. The work/project plan is specifically tailored to meet CSIR requirements – **7 points**

- The approach is innovative and well-articulated, the timeframes and project plan are suited to the project needs. The work/project plan is in sync with the project scope and deliverables – **10 points**

| TOTAL | 100% |

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