



## ***Request for Proposals***

**The provision of research support, documenting processes and editing with respect to metropolitan forward spatial planning of social facilities and updating of facility provision standards to CSIR**

**RFP No. 919/06/02/2020**

Date of Issue:	Thursday, 23 January 2020	
Closing Date and Time:	Thursday, 06 February 2020 at 15h00	
Place:	Tender box, CSIR Stellenbosch Main Reception	
Enquiries	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
CSIR business hours	08h00 – 16h30	
Category	Professional Services	

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## **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. The services required in terms of this proposal are focussed only in Stellenbosch.

## **2 BACKGROUND**

A range of factors, including climate change, technology and economic factors influence the growth and development of cities and towns. The Inclusive Smart Settlements and Regions Impact Area within the Smart Places Cluster provides evidence based planning support and spatial analysis to inform Social Facility Investment Planning for future development. Furthermore, a significant part of the research relates to where people of all income and social groups can sustainably access social services and facilities within a given set of parameters. Many South Africans from disadvantaged communities and vulnerable groups, still experience difficulty in accessing government services and CSIR uses accessibility analysis, facility location planning and the Service Access Planning methodology developed by CSIR and facility access norms and standards to evaluate the demand and supply of facilities and specifically to determine facility backlogs and future requirements within a specific spatial context to support of decision making at metropolitan and national level in a range of projects.

To support this work CSIR has also developed and published facility provision access norms and thresholds standards. This work is from time to time updated or customised for specific contexts in order to meet changing needs and contexts. The development of guidelines, research papers, presentations and research reports form an integral part of the research documentation and dissemination process of the group. The group currently requires for a period of not more than 6 months, the support of a research assistant for between 20 and 30 hours per week as and when required to contribute to a specific project related to the customisation and update of social facility guidelines for metropolitan inner city application and the development of long term facility planning demands. This will be done through the CSIR Request for Proposal 919/06/02/2020

documentation of interactive discussions and supported by domain literature reviews. It further requires support to document and write up the research methodology and develop presentations on this work. The incumbent will also be required to take notes at meetings, arrange workshops and in some cases conduct interviews with stakeholders. The incumbent will be required to support the GIS and planning team to establish and calculate the facility and land backlog at a sub-district level for designated facilities once all the service catchments have been created based on GIS based accessibility analysis. For this purpose, excellent, methodical and meticulous use of excel is an essential requirement. All work should be presented in clear concise power point format and the quality of these documents is expected to be of an excellent language quality.

### **3 INVITATION FOR PROPOSAL**

Proposals are hereby invited for service providers to provide a single resource/consultant (that is 1 person only) to provide the following services to the the CSIR.

1. Update and document the process of facility modification options in an Inner City context
2. Provide research support including arranging meetings and taking minutes as well as managing all electronic documentation of the research process
3. Undertake any required literature studies and compile, modify and update a facility norms and standards schedule based on a range of stakeholder interactions and literature reviews
4. Execute a range of spreadsheet calculations of facility demand following a set process and informed by the standards and formula as well as undertake ad hoc data checking.
5. Edit research reports, power points presentations and contract reports and assist with compilation of these based on research outputs provided
6. Qualify control of maps, tables and document formatting.

#### 4 PROPOSAL SPECIFICATION

All proposals are to be submitted in a format specified in this enquiry (if applicable). However, suppliers are welcome to submit additional information over and above the originally specified format.

Proposals are requested to support and collaborate with CSIR with respect to social facility norms and standards and the application of these for metropolitan planning. This is required to inform future growth and development of one of our major metropolitan cities as well as to contribute specifically on topics related to social facility provision standards. The supplier should demonstrate a specific competence and track record with respect to the competence in all of the above fields. Services providers are required to submitted a CV for a single resource who would be willing and capable of assisting with all of the above as a research assistant for between 20 and 30 hours a week as required. Service providers are also requested to indicate their availability in the period February to June 2020 as well as specific skills and experience in relation to the above including and specific competence (1) in social facility provision planning (2) provision and access specification,(3) report writing and recording of discussions, (4) quality control and language editing. Hourly rates will be required to determine the best value for money for the CSIR

While CSIR makes extensive use of electronic communication it is a specific requirement that the incumbent is available to work closely with the project team who will operate from the CSIR Stellenbosch campus located within the Greater Cape Town, Stellenbosch area. The supplier will be expected to cover all their costs and will be expected to work in the Stellenbosch office for approximately 20-30 hours a week for the duration of the project.

The supplier should be willing and capable to undertaking the following tasks:

- Support research team to compile reports and Power point presentations
- Co-authoring of social facility provision standards update report.
- Quality control / editing of maps, tables, power point presentations and reports which comply with CSIR language and document policy.

- Providing research support including literature studies, arranging meetings and workshops, taking minutes/ notes and compiling an electronic evidence portfolio of all stakeholder interaction.
- Proof reading and document quality checking and formatting consistency
- Create and execute a large number of spreadsheet calculations in excel.
- Ad hoc data checking
- Any reasonable project related administration, filing or photo copying

## **5 INTELLECTUAL PROPERTY**

The intellectual property for all projects undertaken will vest with the CSIR or their client. Suppliers will have no claim to intellectual property developed. Prior knowledge used should be specified and negotiated in advance.

## **6 FUNCTIONAL EVALUATION CRITERIA**

- 6.1 The evaluation of the functional / technical detail of the proposal will be based on the following criteria:
- Academic qualifications in English or Town and Regional Planning- 10 points
  - Academic / research experience including number of publications in planning related field -15 points
  - Knowledge of social facility planning standards and application- 15 points
  - Industry recognised qualification in proof reading and copy editing- 20 points
  - Technical skill in use of MS word, Power point and Excel (Proficiency test may be required)-15 points
  - Language and document editing experience and track record - 25 points
- 6.2 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of **80%** will be eliminated from further evaluation.
- 6.3 The supplier should be willing to submit to a proficiency test and/or to prepare for a possible presentation, should CSIR require such. The supplier shall be notified thereof no later than 4 (four) days before the actual presentation date.

6.4 Refer to **Annexure “A”** for the scoring sheet that will be used to evaluate functionality.

## **7 ELIMINATION CRITERIA**

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Proposals submitted at incorrect location.
- Service providers without resources in possession of a Bachelor’s degree or higher with at least 3<sup>rd</sup> year level English Language credits.

## **8 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE 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](http://www.csd.gov.za);
- provide the CSIR with:
  - valid original or certified copy of the B-BBEE Certificate issued by an accredited verification agency and bearing a SANAS logo; **or**
  - Valid sworn affidavits made on dti designed templates; **or**
  - dti issued sworn affidavit; **or**
  - CIPC issued B-BBEE certificate.
- Preference will be given to suppliers with Level 1 – 4 B-BBEE contributions
- Provide the CSIR with a valid copy of tax certificate.

## SECTION B – TERMS AND CONDITIONS

### 9 PROPOSAL SUBMISSION

All proposals must be submitted at:

- **CSIR STELLENBOSCH - Main Gate** (in the **Tender box**) at the following address  
Council for Scientific and Industrial Research (CSIR)  
Jan Celliers Street  
Stellenbosch  
7600
- Alternatively, soft copies (proposals) may be submitted via e-mail to: [tender@csir.co.za](mailto:tender@csir.co.za) with RFP No: **919/06/02/2020** as the subject

### 10 TENDER PROGRAMME

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

- Issue of tender documents: Thursday, 23 January 2020
- Closing / submission Date: Thursday, 06 February 2020

### 11 SUBMISSION OF PROPOSALS

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

11.2 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 Proposal: RFP No.: **919/06/02/2020**.

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

RFP No.: **919/06/02/2020**.

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

11.4 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.



## 12 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of Thursday, **06 February 2020** 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.

## 13 AWARDING OF TENDERS

13.1 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.

## 14 EVALUATION PROCESS

### 14.1 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.

### 14.2 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.

## 15 PRICING PROPOSAL

15.1 Pricing proposal must be cross-referenced to the sections in the Technical Proposal if required. Any options offered must be clearly labelled. If necessary separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.

15.2 Price needs to be provided in South African Rand (excl. VAT).

15.3 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.*

15.4 Payment will be according to the CSIR Payment Terms and Conditions

## **16 VALIDITY PERIOD OF PROPOSAL**

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

## **17 APPOINTMENT OF SERVICE PROVIDER**

17.1 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.

17.2 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.

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

## **18 ENQUIRIES AND CONTACT WITH THE CSIR**

Any enquiry regarding this RFP shall be submitted in writing to CSIR at [tender@csir.co.za](mailto:tender@csir.co.za) with ***"RFP 919/06/02/2020 The provision of research support, documenting processes and editing with respect to metropolitan forward spatial planning of social facilities and updating of facility provision standards to 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.

## **19 MEDIUM OF COMMUNICATION**

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

## **20 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.

## **21 CORRECTNESS OF RESPONSES**

21.1 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.

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

## **22 VERIFICATION OF DOCUMENTS**

22.1 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.

22.2 Either one hard copy or an electronic copy of each proposal must be submitted.

22.3 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.

22.4 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.

## **23 SUB-CONTRACTING**

23.1 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.

23.2 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.

## **24 ENGAGEMENT OF CONSULTANTS**

The consultants will only be remunerated at the rates:

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

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

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

## **25 TRAVEL EXPENSES**

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

25.1.1 Only economy class tickets will be used.

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

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

## **26 ADDITIONAL TERMS AND CONDITIONS**

- 26.1 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.
- 26.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 26.3 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.
- 26.4 Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

## **27 CSIR RESERVES THE RIGHT TO**

- 27.1 Extend the closing date;
- 27.2 Verify any information contained in a proposal;
- 27.3 Request documentary proof regarding any tendering issue;
- 27.4 Give preference to locally manufactured goods;
- 27.5 Cancel or withdraw this RFP as a whole or in part.

## **28 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.

**29 DECLARATION BY TENDERER**

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

**RFP No: 919/06/02/2020.**

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. **919/06/02/2020** 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: .....	

### 30 ANNEXURE “A” SCORE SHEET TO EVALUATE FUNCTIONALITY

Score 0 – 10 points

The functionality evaluation criteria will be based on the following:

- Education and qualifications- 10 %
  - Degree in English or Town & Regional Planning (sub-category)
    - Minimum requirement is a BA degree with 3<sup>rd</sup> year English or higher or Degree in Town & Regional Planning - 10 points
    - Technical Diploma in English or Town & Regional Planning – 5 points
    - No degree or diploma in English or Planning – 0 points
- Academic / research experience including number of publications in location planning / related fields – 15 %
  - 3-5 years research experience - 1 points
  - 6-8 years research experience -5 points
  - More than 8 years research experience - 8 points
  - Additional points are awarded for publications
    - 2- or more publications - 3 points
    - 1- publications -1 points
    - 0 publications -0 points
- Knowledge of social facility planning standards and application-15%
  - Contributor to projects/ guidelines specifically related to social facility planning standards (sub-category)
    - 4- or more project reports/ Guideline documents - 10 points
    - 1-3 or more project reports/ Guideline documents publications -5 points
    - 0- reports or guidelines - 0 points



- Industry recognised qualification in proof reading and copy editing-20%
  - Diploma in editing - 10 points (sub-category)
    - Industry recognised diploma – 10 points
    - No diploma – 0 points
  
- Technical skill in use of MS Word, Power point and Excel (Proficiency test may be required) -15 %
  - MS word with use of document templates - 5 points
  - MS word with use of document templates **plus** Excel – 8 points
  - MS word with use of document templates **plus** Excel & Power Point – 10 points
  
- Language and document editing experience and track record - 25%
  - More than 3 years editing experience and 2 appointment or reference letters to be supplied - 5 points
  - More than 5 years editing experience and 3 appointment or reference letters supplied - 10 points