

## Request for proposals (RFP)

**For the provision of professional consulting services to position the National Cleaner Production Centre as a Technical Reference Partner to the Energy and Water Seta as the Assessment Quality Partner for two Energy Efficiency Qualifications as well as for the development of a business plan to inform the establishment of the RECP Professional Body**

**RFP No. 773/05/07/2017**

Date of Issue	21 June 2017	
Closing Date	5 July 2017	
Place	Tender box, CSIR Main Reception, Gate 3 ( North Gate)	
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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## **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**

The National Cleaner Production Centre of South Africa (NCPC-SA) is a key industrial sustainability programme of the Department of Trade and Industry (the dti), hosted at the Council for Scientific and Industrial Research (CSIR). The work of the NCPC-SA promotes the implementation of Resource Efficient and Cleaner Production (RECP) methodologies – identifying and advising on cost saving options through reduced energy, water and materials usage, as well as more efficient waste management and use. The Centre is also the implementation partner of UNIDO's Industrial Energy Efficiency (IEE) Project.

The IEE Project contributes to the sustainable transformation of energy usage practices in South African industry and aims to enhance national energy security promote job creation and reduce carbon dioxide emissions. It facilitates the implementation of the new South African Energy Management Standard under the framework of the international energy management standard ISO 50001, as well as builds the capacity to introduce a systems optimization approach in industry in South Africa.

The objectives of the IEE project included development of the following South African qualifications, based on the content of the IEE training courses:

- Energy Audit Technician at NQF Level 6
- Energy Management Advisor at NQF Level 8

Phase two of the IEE Project requires that the NCPC-SA facilitates the roll out of these qualifications. This requires the NCPC-SA to actively partner with Energy and Water Seta (EWSETA) in performing quality assurance responsibilities of these qualifications.

The DTI mandated the CSIR NCPC-SA to facilitate the establishment of a Professional Body for Resource Efficient and Cleaner Production practitioners. This responsibility is reflected in the approved business plan of the NCPC-SA. It also happens to be a KPI of the IEE project. To clarify: the CSIR (NCPC-SA) is charged with the responsibility to facilitate the establishment of a Professional Body for RECP and Green Economy Practitioners as a separate entity.

It was agreed that the CSIR will facilitate the development of a business plan and a range of proposed governance instruments for the Professional Body, after which a recommendation will be made to the dti for a final decision on the operational execution thereof.

### **3 INVITATION FOR PROPOSAL**

Proposals are hereby invited for the provision of Professional Consulting Services to Position the National Cleaner Production Centre (NCPC) as a Technical Reference Partner to the EWSETA as the Assessment Quality Partner (AQP) for two Energy Efficiency Qualifications as well as the development of a business plan, governance guidelines and operational project plan for the establishment of the Professional Body.

### **4 PROPOSAL SPECIFICATION**

Proposals are to be submitted in a format specified in this document; however, tenderers are welcome to submit supplementary proposals over and above the originally specified format.

The NCPC requires proposals that provide information about the elements listed below:

- provision of professional consulting services to position the CSIR NCPC-SA as a technical reference partner to the EWSETA, that was appointed as the Assessment Quality Partner (AQP) by the Quality Council for Trades and Occupations (QCTO) for the two Energy Efficiency Qualifications that the NCPC-SA developed.

- develop of a business plan, governance guidelines and operational project plan for the establishment of the Professional Body.

#### 4.1 PROJECT SCOPE AND DELIVERABLES

The successful supplier would:

##### **4.1.1 Provide guidance and develop products to capacitate the CSIR NCPC-SA as the technical reference partner with which the EWSETA as the AQP would be signing a MoU.**

This deliverables must include:

- a) Identify and list the elements to be addressed in the MoU between CSIR NCPC-SA and EWSETA.
- b) Facilitate discussion and negotiations between the CSIR NCPC-SA and EWSETA regarding AQP matters related to the technical requirements for the following qualifications:
  - Energy Audit Technician at NQF Level 6
  - Energy Management Advisor at NQF Level 8
- c) Advise on the strategic partnership arrangements with EWSETA and QCTO;
- d) Facilitate all meeting processes related to the content and preparation for the drafting and signing of the Memorandum of Understanding (MoU).
- e) Produce operational guides and develop a standard operational procedure document that directs the execution of responsibilities in terms of the abovementioned MoU.
- f) Submit a comprehensive project plan reflecting timelines and delivery of required documents and tools.
- g) Make recommendations on requirements for an information management system that will support the responsibilities of the CSIR NCPC-SA in terms of the MoU between CSIR and EWSETA.

##### **4.1.2 Provide guidance and develop a business plan, governance guidelines and operational policy and procedure documents that would capacitate the CSIR NCPC-SA to facilitate the establishment of a Professional Body for Resource Efficient and Cleaner Production practitioners.**

This deliverables must include:

- a) A professional business plan.
- b) A proposed governance structure.
- c) Scope the recommended operational responsibilities of the professional body for RECP Practitioners.
- d) Comprehensive range of operational policy and procedure documents.
- e) Comprehensive potential operational budget.
- f) A comprehensive project plan reflecting timelines and delivery of required documents and tools.
- g) A slide presentation justifying the establishment and reflecting on the medium and long term benefits of the professional body.

## 5 FUNCTIONAL EVALUATION CRITERIA

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

Criteria Description	Weight
Evidence of familiarity with role and responsibilities of Assessment Quality Partner (AQP)	20
Project plans presented are addressing the expected outcomes and key activities, milestones and timeframes	10
Experience and knowledge in engaging SAQA, QCTO and relevant SETAS on matters relating to quality assurance	5
Detailed description of resources, experience and capacity to participate in discussions between SETAS and their stakeholders	5
Experience in drafting a business plan.	10
Detailed description of experience and knowledge of responsibilities and obligations of Professional Bodies	20
Detailed description of involvement in governance or establishment of a Professional body	20
Experience and knowledge in development of Policies, Procedures and Operational guidelines	10
Total	100

5.2 Proposals with functionality 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; and
- Proposals submitted at incorrect location.

## **7 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 of their CSD registration number; and
- provide the CSIR with a certified copy of their B-BBEE certificate. If no certificate can be provided,

## 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)  
Meiring Naudé Road  
Brummeria  
Pretoria

### 9 TENDER PROGRAMME

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

- Issue of tender documents: 21 June 2017
- Last date for submission of queries: 30 June 2017
- Closing / submission Date: 05 July 2017
- Estimated contract duration (in months/years) 10 Months

### 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 Proposal: RFP No.: 773/05/07/2017

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

RFP No.: 773/05/07/2017

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 **05 July 2017** 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**, local production and content.
- 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](mailto:tender@csir.co.za) with “the provision of professional consulting services to position the National Cleaner Production Centre as a Technical Reference Partner to the Energy and Water Seta as the Assessment Quality Partner for two Energy Efficiency Qualifications as well as for the development of a business plan to inform the establishment of the RECP Professional Body” 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:
  - 24.1.1 Only economy class tickets will be used.
  - 24.1.2 A maximum of R1300 per night for accommodation, dinner, breakfast and parking will be allowed.
  - 24.1.3 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;
- 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:** .....

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..... 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: .....

## 28 ANNEXURE A – Technical scorecard

Criteria Description	Weight	0	3	5	7	10
Evidence of familiarity with role and responsibilities of Assessment Quality Partner (AQP)	20	No proof of relevant experience in education and training quality assurance.	Provided proof less than 3 years' relevant experience in education and training quality assurance.	Provided proof 3 to 5 years' relevant experience in education and training quality assurance.	Provided proof 5 to 7 years' relevant experience in education and training quality assurance.	Provided proof of status as QDF registered by QCTO.
Project plans presented are addressing the expected outcomes and key activities, milestones and timeframes	10	No project plans presented.	Project plans presented but do not include one of the following aspects: the expected outcomes, key activities, milestones or timeframes.	Project plans presented and include all of the following aspects: the expected outcomes, key activities, milestones or timeframes	The approach is specifically tailored to address the specific project objectives and requirements and is sufficiently flexible to accommodate changes that may occur during execution. A basic Gantt chart with milestones and application of resources allocated. The plan is specifically tailored to the critical characteristics of the RFP	The approach is specifically tailored to address the specific project objectives and requirements and is sufficiently flexible to accommodate changes that may occur during execution. A basic Gantt chart with milestones and application of resources allocated. The plan is not only specifically tailored to the critical characteristics of the RFP but also take additional aspects into consideration that will have a positive effect on the final outcome
Experience and knowledge in engaging SAQA, QCTO and relevant SETAS on matters relating to quality assurance	5	No proof of experience to engage SAQA, QCTO and relevant SETAS on matters relating to quality assurance.	Provided proof of less than 1 year experience to engage SAQA, QCTO and relevant SETAS on matters relating to quality assurance.	Provided proof of 2 to 3 years' experience to engage SAQA, QCTO and relevant SETAS on matters relating to quality assurance.	Provided proof of 3 to 4 years' experience to engage SAQA, QCTO and relevant SETAS on matters relating to quality assurance.	Provided proof of 5 and more years' of experience to engage SAQA, QCTO and relevant SETAS on matters relating to quality assurance.
Detailed description of resources, experience and capacity to participate in discussions between SETAS and their stakeholders	5	Provided proof of less than 1 years' experience as well as resources and capacity to participate in discussions between SETAS and their stakeholders	Provided proof of less than 1 years' experience as well as resources and capacity to participate in discussions between SETAS and their stakeholders	Provided proof of 2 to 3 years' experience as well as resources and capacity to participate in discussions between SETAS and their stakeholders	Provided proof of 3 to 4 years' experience as well as resources and capacity to participate in discussions between SETAS and their stakeholders	Provided proof of 5 and more years' experience as well as resources and capacity to participate in discussions between SETAS and their stakeholders



Experience in drafting a business plan.	10	No proof or references of experience in drafting a business plan.	Provide evidence of drafting a business plan.	Provide references as evidence of participation in a team responsible for drafting a business plan.	Provided references as evidence of independently drafting more than one but less than three business plans that were approved by the stakeholder in question	Provided references as evidence of independently drafting more than five business plans.
Detailed description of experience and knowledge of responsibilities and obligations of Professional Bodies	20	No experience and knowledge of responsibilities and obligations of Professional Bodies	Provided proof of 1 to 2 years of experience and described a limited number of responsibilities and obligations of Professional Bodies	Provided proof of 2 to 3 years of experience and described a limited number of responsibilities and obligations of Professional Bodies	Provided proof of 3 to 4 years of experience and described the full range of legally mandated responsibilities and obligations of Professional Bodies	Provided proof of more than 4 years of experience and described an extended range of responsibilities and obligations of Professional Bodies
Detailed description of involvement in governance or establishment of a Professional body	20	No previous involvement in governance or establishment of a Professional body	Description of involvement in governance of a Professional Body but no references and evidence	Provided references and proof of involvement in governance of a Professional Body	Provided references and proof of involvement in establishing a Professional Body	Provided references and proof of involvement in governance and establishment of a Professional body
Experience and knowledge in development of Policies, Procedures and Operational guidelines	10	No previous experience in the development of Policies, Procedures and Operational guidelines Policies and Procedures	Description of experience and knowledge in development of Policies, Procedures and Operational guidelines but no references and evidence	Provided references and evidence of contributing to the development of Policies, Procedures and Operational guidelines	Provided references and evidence of independently developing a set of Policies, Procedures and Operational guidelines	Provided references and evidence of independently developing multiple sets of Policies, Procedures and Operational guidelines
Total	100					