



Request for Proposals (RFP)

Appointment of a Panel of Service Providers to Conduct External Psychometric Assessment at CSIR for a three (03) year period.

RFP No. 3447/03/05/2021

Date of Issue	Friday, 16 April 2021	
Compulsory Briefing Session	Date: 23 April 2021 Venue: Virtual–Microsoft Teams Time: 10H00 – 11H00 Access link: https://teams.microsoft.com/l/meetup-join/19%3ameeting_Y2lwZmRjYjQtZWl0OS00ZWZiLWI3MTQtMTImZmRmNWZiYTQz%40thread.v2/0?context=%7b%22Tid%22%3a%22fd3c5d5-ddb2-4ed3-9803-f89675928df4%22%2c%22Oid%22%3a%221c4f96d0-2ecb-491c-b318-727359f0400a%22%7d	
Closing Date	Monday, 03 May 2021	
Enquiries	Strategic Procurement Unit	E-mail: tender@csir.co.za
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 Council for Scientific and Industrial Research has a need to appoint a panel of psychometric assessment service providers is to deliver psychometric assessments function in line with the CSIR's competency framework. The objective of conducting psychometric assessments is to provide specialist information in support of managerial decision-making, by improving the accuracy of decisions regarding the talent acquisition, talent management, promotion and development, career planning, etc. of candidates. The assessments will be aligned to a specific job description for different positions to assess the level of suitability of the potential candidate. This process will also ensure that a candidate possesses the amount of skill and cognitive ability to perform the duties of a job/role they are considered for, using relevant batteries appropriate for different levels. The service provider is expected to clearly stipulate their approach and provide a step-by-step explanation of the proposed process to meet objectives of this requirement.

The service provider will be required to understand the organisational context at both micro and macro levels and provide effective and relevant psychometric assessments. The CSIR values (EPIC) are embedded in all our processes and underpins all human resources decisions. **Excellence** - We excel at R&D and industrial innovation solutions that address South Africa's challenges. **People-centred** – We care about people – our impact through innovation aims to improve lives. **Integrity** – We value integrity – in ourselves and in others. **Collaboration** – We are keen to learn from one another and collaborate across the organisation and with external partners.

3 INVITATION FOR PROPOSAL

Proposals are hereby invited for the Provision of Psychometric Assessment services to the CSIR for a period of three (3) years.

The CSIR is looking to make use of the services of a panel of experienced Psychometrists to conduct assessments as and when required. The CSIR will not appoint a single company, but will work with different service providers that satisfy the set functionality criteria, are the most competitive in terms of price and B-BBEE. The appointed service providers will be listed as preferred suppliers and will be approached as and when required.

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:

- Covering letter;
- Company profile clearly stipulating the number of years rendering similar services;
- Provide a minimum of three (3) contactable references from previous clients for similar work done;
- Provide a sample assessment reports
- Provide a project methodology that must cover the following aspects as outlined in the scope of service.

4.2 SCOPE OF SERVICE

The appointed service providers will be responsible for the following activities;

- The design and customisation of assessment tools and techniques in accordance with HPCSA guidelines;
- Conduct assessments with recommended candidates from the interview
- Compile individual reports and feedbacks to the panel on the assessment outcomes
- Provide psychometric assessments at different organisational levels including; Executive, Senior Management and Management.

5 FUNCTIONAL EVALUATION CRITERIA

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

Functional Factors	Criteria Description	Weighting (%)
Company Experience	Number of years the tenderer has been rendering the services stipulated in paragraph 4.2 above	20
The Assessor Criteria	The Psychologists/Psychometrist of the organisation /entity must be registered with the Health Profession Council (HPCSA)	15
Client references	The bidder must provide at least three (3) references for assessment services that the bidder has carried out in the past three (3) years.	20
Sample Feedback Reporting	The bidder must have relevant experience in compiling individual reports and provision of assessment feedback.	15
Methodology and Approach	A detailed approach, methodology and tools on how they will assist CSIR in achieving the objectives of this request must be provided..	30
	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.

6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the closing date;
- Proposals not submitted in accordance with this document;
- Non-attendance of the compulsory briefing session.

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 **03 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 not be disqualified.

10 TENDER PROGRAMME

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

- Issue of tender documents: 16 April 2021
- Compulsory briefing session: 23 April 2021
- Last date for submission of queries: 26 April 2021
- Closing / submission Date: 03 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 contracts to the successful tenderers.

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 tenderers who score 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 3447/03/05/2021 – Appointment of a Panel of Psychometric Assessment Experts”*** 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 must be 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 TRAVEL EXPENSES

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

- 23.1.1 Only economy class tickets will be used.
- 23.1.2 A maximum of R1, 400.00 per night for accommodation, dinner, breakfast and parking will be allowed.
- 23.1.3 No car rentals of more than a Group B will be accommodated.

24 ADDITIONAL TERMS AND CONDITIONS

- 24.1** 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.
- 24.2** Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 24.3** 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.

24.4 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.

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

25 CSIR RESERVES THE RIGHT TO

25.1 Extend the tender validity period;

25.2 Verify any information contained in a proposal;

25.3 Request documentary proof regarding any tendering issue;

25.4 Give preference to locally manufactured goods;

25.5 Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);

25.6 Award this RFP as a whole or in part;

25.7 Cancel or withdraw this RFP as a whole or in part.

26 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: 3447/03/05/2021

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. 3447/03/05/2021** 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)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES	
1
2
DATE:.....	

27 ANNEXURE A

Functional Factors	Proof Required	Weighting	5	7	10
<p>Company Experience</p> <p>Number of years the company has been providing psychometric assessments services.</p>	<p>Company profile clearly indicating the number of years in business providing psychometric assessments services</p>	20	≥1- 3 years	>3 – 5 years	More than 5 years
<p>The Assessor Criteria</p>	<p>The Psychologists/Psychometrists of the organisation /entity must be registered with the Health Profession Council (HPCSA).</p>	15	≥3 – 6 six years	>6-10 years	More than 10 years
<p>Client references.</p> <p>The service provider must have previously provided similar services.</p>	<p>The bidder must provide at least three (3) references for psychometric assessment services carried out in the past five (05) years.</p>	20	Less than 3 references provided	3 – 5 positive references provided	More than 5 positive references provided
<p>Sample Feedback Reports</p> <p>The bidder must have relevant experience in compiling individual reports and provision of assessment feedback.</p>	<p>The bidder(s) must provide samples reports compiled for individuals at different organisational levels.</p>	15	Provided three sample individual reports from different organisational level with one report being management level.	Provided three pairs of comparable sample reports for individuals at different organisational levels, with one report being on management level.	Provided three pairs of comparable sample reports for individuals at different management levels.

<p>Methodology and Approach</p> <p>The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document.</p>	<p>A detailed approach, methodology and tools on how they will assist CSIR in achieving the objectives of this request must be provided.</p>	<p>30</p>	<p>A leadership psychometric assessment tool battery.</p>	<p>A leadership psychometric assessment tool plus inbaskets/ case studies/presentations/ on the job activity.</p>	<p>A proposal on how the methodology will be applied in the context of CSIR in support of our operating model.</p>
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28 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
Proof of registration with the Health Professional Council of SA (HPCSA) – (Provide certificate)		
Company Experience– (Company Profile) Number of years the company has been rendering Psychometric Assessment Services.		
Company References – (Client reference letters) The service provider must provide evidence that they have successfully Provided psychometric assessment services. At least three (3) 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, <u>Annexure C MUST be completed for each reference provided.</u>		
Sample Feedback Report The bidder(s) must provide samples reports compiled for individuals at different organisational levels.		
Methodology and Approach 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.		
PART B: PRICING PROPOSAL		

32	Pricing Proposal		
33	B-BBEE Certificate		
34	Completed SBD1 Form		
35	Declaration by tenderer		

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

29 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: **Project End Date:**

Contract Amount:

Rate Service Provider (Put a mark to the relevant score)

Indicator	Excellent	Very good	Good	Poor	Unacceptable
Score	5	4	3	2	1

Would you use the service provider again: Yes / No

Referee Contact Person:

Referee Designation:

Referee Contact number:

Referee Email:

I hereby declare that to the best of my knowledge, information completed above is true and correct.

Bidder's referee signature: **Date:**

(FORM TO BE COMPLETED BY REFEREE AND NOT BIDDER)

30 ANNEXURE D – PRICING SCHEDULE

Service Component (Rates)	Year 1 (Excl. VAT)	Year 2 (Excl. VAT)	Year 3 (Excl. VAT)
Psychometric Assessment			
Executive level			
Senior Management level			
Management level			
Sub-Total			
VAT @15%			
Total			

31 ANNEXURE E SBD1 FORM