



Request for Proposals (RFP)

For Developing a People Strategy for the CSIR.

RFP No. 3461/05/07/2021

Date of Issue	Friday, 18 June 2021	
Compulsory Briefing Session	Date: 25 June 2021 Venue: Virtual–Microsoft Teams Time: 10H00 – 11H00 Access link: https://teams.microsoft.com//meetup-join/19%3ameeting_NzE2YmM4ZGEtZmJmYS00MjdhLWFhYjctMTIzMDBmYTQzNGE1%40thread.v2/0?context=%7b%22Tid%22%3a%222fd3c5d5-ddb2-4ed3-9803-f89675928df4%22%2c%22Oid%22%3a%221c4f96d0-2ecb-491c-b318-727359f0400a%22%7d	
Closing Date	Monday, 05 July 2021	
Enquiries	Strategic Procurement Unit	E-mail: tender@csir.co.za
CSIR business hours	08h00 – 16h30	

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SECTION A – TECHNICAL INFORMATION

1 INTRODUCTION

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

2 BACKGROUND

The CSIR unveiled its new vision, mission, strategic objectives and focus areas and has just completed its first year of strategy implementation. The thrust of the CSIR's new strategy, is to drive industrial development. The organisation has also implemented new business and operating models to achieve the strategy. Other critical organisational changes include having fit for purpose organisational support structures, services, systems, tools and processes that will enable and embed an agile, efficient, effective, integrated and collaborative new way of working.

The CSIR has defined strategic goals that underpin the new strategy. These specific strategic objectives crystallise what the organization must do to achieve growth, sustainability, relevance and impact in their quest to achieve the organization's mandate. These strategic objectives include;

Strategic objective 1: Conduct research and development of transformative technologies and accelerate their diffusion,

Strategic objective 2: Improve the competitiveness of high-impact industries to support South Africa's re-industrialisation by collaboratively developing, localising and implementing technology,

Strategic objectives 3: Drive the socioeconomic transformation through RD&I which supports the development of a capable state,

Strategic objective 4: Build and transform human capital and infrastructure, and

Strategic objective 5: Diversify income, maintain financial sustainability and good governance.

The CSIR already has a well-articulated Human Capital (HC) Strategy that aligns human capital to its organisational activities and values. In taking forward our mandate as guided by the CSIR operating model, we recognise our people as the key drivers for achieving our objectives. A CSIR **People Strategy** is important to drive staff performance and get the most of our valuable company resource. Through the strategy, the company will ensure that right people are in the right roles and can deliver right outcomes at the right time. The strategy should ensure that our people have meaningful work and better careers so that our people thrive leading to be an effective workforce and by extension, the organisation. It should take into account the nature and type of organisation that the CSIR is, and the type of people or knowledge workers that are employed. The human resources of the CSIR are its most important asset to deliver on its mandate.

It is to this end that the CSIR would like to engage a service provider to develop and facilitate the development of the CSIR People Strategy. This is to enable the CSIR to outline plans to achieve its objectives through and with its employees.

Further, it is against the above background that CSIR seeks to appoint a capable service provider to benchmark the proposed people strategy with global best practice to support realisation of the CSIR strategy. This thinking is currently at a nascent stage.

3 INVITATION FOR PROPOSAL

Comprehensive proposals are hereby invited for developing a people strategy for the CSIR.

The purpose of this Request for Proposal (RFP) is to seek out potential, suitably qualified service providers to support the CSIR in this initiative. The CSIR regularly benchmarks its performance with a number of similar, globally recognised research and technology organisations in various metrics, from the profile of its science, engineering and technology base, research and technology development outputs, revenue streams, and so on. To this end, the CSIR is now seeking to benchmark approaches that research and technology

organisations, public entities and private companies that are leading in people practices and strategies have adopted to successfully realise the business strategy.

The project should not take more than ninety (90) days to complete.

4 PROPOSAL SPECIFICATION

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

4.1 Technical Proposal

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

- a) An executive summary: providing a brief overview of all the required aspects of the proposal
- b) A summary of the bidder's understanding of what a "people strategy" entails and the approached they plan to deploy in developing such a strategy. Note: ***bidders must include a portfolio of evidence (POE) of similar work in support of their proposed approach;***
- c) A description of the relevant qualifications and experience of the team leader in implementing similar assignments in other organizations;
- d) References in writing of three or more similar initiatives successfully implemented and managed with proven and measured success by the bidder within the last five years;
- e) A description of the proposed overall approach and methodology for the CSIR People Strategy including:
 - i. Strategy Development Approach and methodology/tool(s) – details on the tool(s) being recommended for use including such detail as optimal use, frequency of use, whether it can be customized, reviews from other users, precision in predicting workplace trends and method of evaluation, etc.;
 - ii. Evaluation of Strategy implementation and action planning – describe the assessment methodology and approach to building a successful action plan for an organization to address results;
 - iii. Overall project work plan outlining the proposed cycles during the 90 days' project cycle;
- f) Details of the proposed project team who will manage the project with the CSIR;

- i. Names and resumes of the proposed project team members; and **Two (2)** references for each proposed individual demonstrating relevant experience for the proposed role within the last five years;
- g) Financial proposal (presented separate from the technical proposal).

Failure to include any required components of the Proposal, or to include them clearly as listed above may result in disqualification of the Proposal.

4.2 SCOPE OF SERVICE

The service provider is expected to develop the People Strategy for the CSIR that takes into consideration of the business environment through environmental scanning and monitoring of changes and managing the risk presented by these changes. Establish top people priorities that will help the CSIR to achieve desired business outcomes and deliverables. Through wide consultations create ownership of the strategy by all people in the CSIR. Setting up measures and providing a final strategy document that is employee friendly accessible to all employees.

The CSIR further, request a selection of 5 case studies on people strategies for a deep dive analyses with a view to make specific recommendation for the CSIR. The five cases should be chosen on the basis of success, relevance of approaches and lessons to be learned to the CSIR as well as any other relevant criteria. The case studies should include a mix of applicable RTOs, public entities and private companies in developed and developing countries. The CSIR recognises its uniqueness in terms of having a developmental mandate, which is not necessarily the case with leading RTOs that are predominantly in developed countries.

The high level benchmarking and deep dives should be incorporated in the development of the people strategy with key recommendations to be considered by the CSIR.

4.3 DELIVERABLES

The CSIR requires the following deliverables:

- a) The CSIR People Strategy;
 - Delivery of a detailed people strategy that responds optimally to CSIR's mandate, vision, mission, strategic intent, values and business strategy;

- Presentation of the draft CSIR People Strategy to the Executive Committee for input, critique, update and adoption of the strategy.
- b) People Strategy Implementation Plan and Roadmap;
- Identify **critical activities** required for successful development of the new CSIR People Strategy;
 - Provide a **detailed Change Management and Communication plan** for the implementation of the CSIR People Strategy;
 - Prepare a **Dashboard to Monitor, Track and Evaluate** the strategy development and implementation.

In order for the service provider to fully assess the viability and value addition of the envisaged People Strategy, the service provider must;

- Familiarise themselves with the mandate, vision, mission, strategy and operating model and
- The EPIC Values as well as the Change management approach.

5 FUNCTIONAL EVALUATION CRITERIA

- 5.1** Functional evaluation will be done in two phases. The first phase will be based on the bidder's technical submission and the second phase on a presentation to be delivered by the bidder.
- 5.2** The purpose of the presentation is to provide the opportunity to the bidder to present their proposal, as well as to mutually clarify issues relating to the brief and project as a whole. It is not an opportunity for the bidders to amend their proposals.
- 5.3** Bidders who proceed to the second phase will each be allocated 20 minutes to present their proposal and will be expected to respond to clarity seeking questions posed by the committee member(s).
- 5.4** Bidders that achieve an overall minimum technical score of 70% and not less than 50% on each criterion for phase one of the evaluation will be invited for presentations.
- 5.5** The bidding companies who qualify for the second phase of evaluation will be notified in advance of the date and venue of the presentations.
- 5.6** Bidder will be required to achieve an overall score of 70% for functionality and not less than 50% on any of the individual criterion for phase two in order to be evaluated further on price and B-BBEE.

5.7 Refer to Annexure “A” for the scoring sheet that will be used to evaluate functionality. **It is critical that you examine how the points will be allocated per item to avoid your team being marked down or disqualified if the information required is not explicit.**

5.8 The overall evaluation of the functional / technical detail of the proposal and presentation will be based on the following criteria:

Phase One

Evaluation Criteria	Description	Weight
Technical	Qualification and Experience of Organization and Team	30
	<ul style="list-style-type: none"> • Experience of the organisation in the design of a people strategy and the implementation thereof • Qualifications of the lead individual working with organizations to design a people strategy. • Experience of the lead individual in managing the design, approval and implementation of a people strategy in organisations similar to the CSIR 	10 10 10
Technical	Proposed Design Approach , Tools and Implementation Plan	50
	Methodology to provide for <ul style="list-style-type: none"> • Proposed design approach for a people strategy • Resource planning tools to develop a people strategy • Process to consult and obtain approval on the draft strategy • Strategy implementation plan and change management process • A POE in support of the proposed approach 	50
Value Adds	New/innovative and value added approaches to service delivery	10
	<ul style="list-style-type: none"> • Bidder provides additional value-adds in terms of tools and resources, expedient design and development process, low cost, customer services, and various 	10

	innovative service delivery approaches, including the use of technology.	
Client References	Reference letters (Refer to Annexure B)	10
	<ul style="list-style-type: none"> The company must have not less than 3 references where a people strategy was designed, developed and successfully implemented in organisations of a similar nature/stature to the CSIR, in the past 5 years 	10
Total		100

Phase Two

Evaluation Criteria	Description	Weight
Presentations		100
	<ul style="list-style-type: none"> Shortlisted Bidder to deliver a presentation on its experience in benchmarking, development of strategy, examples of strategies and company where such strategies were implemented. 	
Total		100

5.9 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.

5.10 Refer to Annexure “A” for the scoring sheet that will be used to evaluate functionality. **It is critical that you examine how the points will be allocated per item to avoid your team being marked down or disqualified if the information required is not explicit.**

6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the closing date;
- Submission at the incorrect email address;
- Bidder who are restricted by National Treasury;
- Non-attendance of the compulsory briefing session.

7 NATIONAL TREASURY CSD AND TAX COMPLIANCE STATUS

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 **Monday, 05 July 2021** by 16h30.

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

10 TENDER PROGRAMME

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

- | | |
|--|--------------|
| • Issue of tender documents: | 18 June 2021 |
| • Compulsory briefing session: | 25 June 2021 |
| • Last date for submission of queries: | 28 June 2021 |
| • Closing / submission Date: | 05 July 2021 |

11 AWARDING OF TENDERS

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

12 EVALUATION PROCESS

12.1 Evaluation of proposals

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

A two-phase evaluation process will be followed.

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

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

12.2 Preference points system

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

13 PRICING PROPOSAL

13.1 Pricing proposal must be cross-referenced to the sections in the Technical Proposal.

13.2 Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.

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

13.4 Only firm prices* will be accepted during the tender validity period. Non-firm prices** (including prices subject to rates of exchange variations) will not be considered.

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

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

***Non-firm price is all prices other than “firm” prices.*

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

14 VALIDITY PERIOD OF PROPOSAL

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

15 APPOINTMENT OF SERVICE PROVIDERS

15.1 The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.

15.2 Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement CSIR reserves the right to appoint an alternative supplier.

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

16 ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry regarding this RFP shall be submitted in writing to CSIR at tender@csir.co.za with ***“RFP No 3461/05/07/2021 – Developing a People Strategy 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.

17 MEDIUM OF COMMUNICATION

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

18 COST OF PROPOSAL

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

19 CORRECTNESS OF RESPONSES

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

20 VERIFICATION OF DOCUMENTS

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

21 SUB-CONTRACTING

- 21.1** A tenderer will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than **25%** of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.
- 21.2** A tenderer awarded a contract may not sub-contract more than **25%** of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.
- 21.3** Where the tenderer intends to sub-contract a portion of the contract, the capabilities of the subcontractor will be evaluated in accordance with the criteria defined in the RFP. The

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

22 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

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

23 ADDITIONAL TERMS AND CONDITIONS

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

24 CSIR RESERVES THE RIGHT TO

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

25 DISCLAIMER

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

26 DECLARATION BY TENDERER

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

RFP No: 3461/05/07/2021

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. 3461/05/07/2021** 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

No.	Criteria	Proof required	Points allocation	Weight
1	<p>Qualification and Experience of Organization and Team The team must have a demonstrated experience in successfully designed, developed and implemented people strategy in organisations similar to the CSIR (government, research councils, private sector or parastatals).</p> <ul style="list-style-type: none"> • The team leader must have <u>not less</u> than 5 years' experience in the design, development and implementation of a people strategy. Experience in working with organisations similar in nature to the CSIR in the past 5 years with successful people strategy interventions would be a strong advantage. • The team leader must hold at least an appropriate Honours Degree in Strategy Management/Development or equivalent as a minimum. • Experience of the organisation in the design of a people strategy and implementation thereof 	<p>CV of lead individual <u>explicitly</u> indicating the number of years leading people strategy assignments and to which organisations. Level of experience of leader clearly articulated.</p> <p>Experience to include designing, developing, implementing and evaluating tool(s) for organizations that successfully meet the needs of the client organization.</p> <p>Examples of success stories demonstrating experience and successful outcomes.</p> <p>Qualification(s) of leader must be indicated.</p> <p>Organisation's experience in the design of a people strategy and implementation thereof</p>	<p>0 points – Team leader has no experience in the management of the design, development and implementation of a people strategy.</p> <p>3 points – Team leader has less than five years' experience in the management of the design, development and implementation of a people strategy.</p> <p>5 points - Team leader has five –seven years' experience in the management of the design, development and implementation of a people strategy.</p> <p>7 points - Team leader has eight - ten years' experience in the management of the design, development and implementation of a people strategy.</p> <p>10 points - Team leader over ten years' experience in the management of the design, development and implementation of a people strategy.</p>	<p>10%</p>
			<p>0-points – Lead individual is not qualified with an appropriate strategy management/development Honours Degree or equivalent</p> <p>5-points – lead individual is with an appropriate strategy management/development Honours Degree or equivalent.</p>	<p>10%</p>

			<p>10-points – lead individual holds a Master Degree or higher in strategy management/development.</p>	
			<p>0 points – The organisation has no experience in the design of a people strategy and the implementation thereof</p> <p>5 points – The organisation has five -nine years' experience in the design of a people strategy and the implementation thereof</p> <p>7 points – The organisation ten -fifteen years' experience in the design of a people strategy and the implementation thereof</p> <p>10 points – The organisation has over fifteen years' experience in the design of a people strategy and the implementation thereof</p>	10%
2	<p>Proposed Design Approach, Tools and Implementation Plan</p> <p>The bidder must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. An in-depth understanding of the CSIR and its role and mandate is required. A detailed approach, methodology and tools on how they will assist CSIR in achieving the objectives of this request, must be provided, including an outline of the project deliverables, indicating key milestones and turnaround</p>	<p>Detailed Methodology, Approach and Gantt Chart/time line</p> <p>Methodology to provide for</p> <ul style="list-style-type: none"> • Proposed design approach for a people strategy • Resource plan tools to develop a people strategy 	<p>0 points - Non-submission or proposal does not address the scope of the assignment</p> <p>5 points - Approach is very generic. The bidder's proposal addresses and meets minimum or basic project requirements. The work plan and timeframes meet the requirements of the assignment; the sequencing of activities indicate the bidder understand the requirements.</p>	50%

	times. Detailed costing is critical.	<ul style="list-style-type: none"> • Process to consult and obtain approval on the draft strategy • Strategy implementation plan and change management process, • Overall project work plan outlining the proposed cycles during the 90 days' project cycle (POE) of similar work in support of their proposed approach; 	<p>7 points - Approach is specifically tailored to suit the CSIR's people strategy requirements. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities demonstrate that the bidder clearly understand the requirements and has a good understanding of the needs of the CSIR.</p> <p>10 points -The approach is innovative and more than exceeds the expectations of the CSIR. The work plan and timeframes meet or beat the requirements of the assignment, the sequencing of activities indicate the bidder has an excellent or demonstrated in-depth understanding of the requirements of the CSIR.</p>	
3	Value Adds	<ul style="list-style-type: none"> • Bidder provides value adds in terms of tools and resources expedient design and development process, low cost, customer services, and various innovative service delivery approaches including use of technology. 	<p>0 points - bidder failed to provide any value add services</p> <p>5 points – Proposed value add is very generic. The bidder's approach addresses and meets minimum or basic project requirements.</p> <p>7 points - Proposed value add is specifically tailored to suit the CSIR's people strategy requirements.</p> <p>10 points - bidder proposed innovative value</p>	10%

			adds more than exceed the expectations of the CSIR	
4	References The company must have not less than 3 references confirming successful design, development and implementation of a people strategy in organisations of a similar stature/nature to CSIR, in the past 5 years	Reference Letters, with the following information as a minimum <ul style="list-style-type: none"> • Client • Contact Person • Contact Number • Email 	0 points - < 3 references 5 points - 3 - 5 references 7 points - 6 - 8 references 10 points - >8 references	10%
	Total			100%

Second phase (Bidder Presentation)

No.	Criteria	Points allocation	Weight
1	STRATEGY DEVELOPMENT Shortlisted Bidder to deliver a presentation on their experience in benchmarking, development of strategy, example of strategies and companies where such strategies were implemented.	0 points – The strategy approach does not meet CSIR’s expectations. Bidder failed to articulate understanding of project requirements. 5 points - The strategy approach is very generic. It addresses and meets minimum or basic project requirements. 7 points - The strategy approach is specifically tailored to suit the CSIR’s people strategy requirements. 10 points - The strategy approach is innovative and more than exceeds the expectations of the CSIR.	100%
	Total		100%

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
Qualification(s) of team leader		
CV of Team leader		
<p>Company References – (Client reference letters or Completed reference form- Annexure C)</p> <p>References should be presented in a form of a written letter on an official letterhead from clients where similar services (strategy development) have been provided.</p> <p>Annexure C to be completed by the referee and not the bidder.</p> <p>The references letters must have the following details:</p> <ul style="list-style-type: none"> • The reference letter must be in official client company letterhead; • The reference letter must be from different entities • The Reference letter must indicate the description of the services and date of the service provided, and value of the transaction or contract. • The reference letter must have email address and telephone number. • The reference letter must have email address and telephone number. 		
<p>Methodology and Approach including Work plan/timelines – (Detailed Methodology, Approach and Gantt Chart- refer to paragraph 27)</p>		

<p>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.</p>		
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PART B: PRICING PROPOSAL			
32	Pricing Proposal		
33	B-BBEE Certificate		
34	Completed SBD1 Form		

29 TECHNICAL PROPOSA CHECKLIST

PROPOSAL SHOULD INCLUDE:		
TECHNICAL RETURNABLES		
Description	Included (Please tick ✓)	
	Yes	No
An executive summary		
A summary of the bidder's understanding of what a people strategy entails and the approached they are to employ in developing such a strategy		
A portfolio of evidence (POE) in support of their proposed approach		
Clearly articulated qualifications and experience of the team leader in implementing similar assignment in other organizations		
References for three similar initiatives successfully implemented and managed with proven and measured success by the bidder within the last five years		
<p>A description of the proposed overall approach and methodology including:</p> <ul style="list-style-type: none"> • Strategy Development Approach and methodology/tool(s) – details on the tool(s) being recommended for use including such detail as optimal use, frequency of use, whether it can be customized, reviews from other users, precision in predicting workplace trends and method of evaluation, etc.; • Evaluation of Strategy implementation and action planning – describe the assessment methodology and approach to building a successful action plan for an organization to address results; • Overall project work plan outlining the proposed cycles during the 90 days' project cycle; 		
A description of the proposed project team or individual who will manage the project with the CSIR		
Names and resumes of the individual or proposed project team members;		
Two references for each proposed individuals demonstrating relevant experience for the proposed role within the last five years		

30 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:**

31 ANNEXURE D – PRICING SCHEDULE

No.	Service Components	Unit of Measure	Quantity	Price / Rate (Excl. VAT)	Price / Rate (Incl. VAT)
1.	Development of a detailed people strategy and Presentation to the Extended leadership team the CSIR	Sum	1		
2.	Facilitate Implementation of people Strategy	Sum	1		
NB: Pricing must be inclusive of all costs to be incurred by the bidder in the delivery of the required services.					
				Sub-total	
				VAT	
				Total	

32 ANNEXURE E SBD1 FORM