



## Request for Proposals (RFP)

### For Provision of an electronic SHEQ Management & Reporting tool for the CSIR

**RFP No. 3471/26/07/2021**

Date of Issue	Friday, 09 July 2021	
Compulsory Briefing Session	<b>Date:</b> 16 July 2021 <b>Venue:</b> Virtual–Microsoft Teams <b>Time:</b> 10:00 – 11:30 <b>Access link:</b> <a href="https://teams.microsoft.com/l/meetup-join/19%3ameeting_MTRmMjBjZjUtMmY3ZS00ZDFjLTkwOTUtOThmODc4OWRjZjQ5%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">https://teams.microsoft.com/l/meetup-join/19%3ameeting_MTRmMjBjZjUtMmY3ZS00ZDFjLTkwOTUtOThmODc4OWRjZjQ5%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</a>	
Closing Date	26 July 2021	
Enquiries	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
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 regional offices.

### **2 BACKGROUND**

The CSIR SHEQ department has been challenged with delivering optimal support to the organisation's operations due to the existence of fragmented systems that do not talk to each other. These systems remain manually driven. This becomes not only burdensome to the SHEQ department but also to the operations that they are trying to support. This is not sustainable especially within the current circumstances where remote working is encouraged and this might be the norm going forward.

To accommodate the new norm and improve the support offering, the CSIR requires a fully integrated SHEQ Management system tool, offering conformance to international standards viz. ISO 9001, ISO 14001 and ISO 45001, as well as compliance to applicable SHE legislation. This would be a modular system that will initially focus on SHEQ requirements but later have the capacity to incorporate additional areas such as Enterprise Risk Management, Compliance and Audit solutions which supports the CSIR's Business Management framework, Compliance strategy and Audit methodology whilst embedding best practice frameworks e.g. ISO 31000, legal requirements applicable to CSIR environment and Internal Audit Standards, ISO 19011, etc.

CSIR is in the process of adopting an integrated approach to assurance, that aims to support and co-ordinate the establishment of effective management system that includes internal controls in order to provide reasonable assurance that CSIR objectives are achieved in accordance with ISO 9001; ISO 14001; ISO 45001; ISO 19011; ISO 31000 and any related requirements/guiding documents.

### 3 PURPOSE OF THE TOOL

The current challenges faced by the SHEQ department include the following:

- Lack of easily accessible on-line processes – *impedes monitoring & management leading to increased incidents*
- Manual SHE Reps inspections – *time consuming, routing, tracking sign-off and record management/ keeping*
- Manual Management by walk about (MBWA) reports – *cumbersome process, tracking of implemented mitigation measures; difficulties with monitoring the effectiveness of mitigations.*
- Manual Risk Assessments – *manual routing and sign off, continued access, update and reviews*
- Manual SHE Tracker – *Manual process, Different trackers do not talk to each other, bigger CSIR picture cannot be established*
- Numerous Reporting platforms – *Manual process, Intelligent reports cannot be consolidated and drawn to understand where issues lie*
- Stand-alone CAR System – *Isolated system (Not integrated with any system viz. Archibus)*

SHEQ reporting is done on various manual platforms and does not allow for easy integrations of the various standards. Manual interventions are needed to follow-up on incidents, obtain statistics and analyse trends. There are existing SHEQ software packages on the market that can provide solutions to the above issues and improve SHEQ functionality in the CSIR.

### 4 INVITATION FOR PROPOSAL

Proposals are hereby invited for the Provision of an electronic SHEQ management and reporting tool for the CSIR.

### 5 PROPOSAL SPECIFICATION

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

#### 5.1 Technical Proposal

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

- Covering letter outlining the benefits of the proposed tool;
- Company profile clearly stipulating the number of years rendering similar services;

- Provide a minimum of three (3) contactable references from previous clients for where a similar tool was developed and implemented;
- Provide a sample report of incidence report and usage of the service;
- Provide a project methodology that must stipulate in detail the project steps and expected timelines from appointment to handover;
- Provide a working demonstration of the tool to the technical committee;
- Provide details of the project team leader and team members that will be dedicated to the project;
- Provide details of license agreements and costs for end users
- Provide a detailed training plan for end users

## **5.2 SCOPE OF SERVICE**

The below outlines the desired scope of service and tool requirements, however the requirements are not limited only to the below. Additional service offerings provided by various software programmes will be considered as part of the evaluation.

### **The business objectives are as follows:**

- Adopt an integrated approach to conformance and assurance with the aim to support and co-ordinate the establishment of an effective management system with internal controls acceptable to provide reasonable assurance that objectives are achieved in accordance with all SHEQ relevant standards including ISO 31000, 14001, 45001, 9001, amongst others.
- Implement a fully integrated Governance, Risk-based Compliance and Audit solution which supports planning, management, execution and monitoring of activities that will integrate:
  - Conformance to international standards
  - Enterprise Risk Management
  - Compliance to legal requirements
  - Internal Audit
- Streamline planning, resources management and monitoring.
- Enable combined assurance, coordinated planning, management and aggregation of reporting.

- Enable reporting by each discipline within the different operating divisions, centres and portfolios within the organisation; as well as integrated assurance reporting against each strategic objectives.
- Organisation-wide access to the system by all in accordance with assigned user profiles and delegated access.
- The SHEQ department would like to procure an off-the-shelf software solution which is flexible and offers modular system that can be configured to meet the CSIR requirements viz.

#### **5.2.1 SHEQ Tool Requirements:**

- SHEQ Planning/Scheduling system (Events; Audits; Inspections, Training, etc.)
- Computer-based training system for SHEQ topics
- Corrective Action Reporting (CAR) system with built in Root Cause Analysis, incident report generation and escalation when not attended to timeously
- Document and Information Management system – ability to generate document numbers, version control, upload document templates, etc
- Customer satisfaction surveys
- Supplier management system
- Process Mapping Tool
- SHE Risk Management Tool that includes monitoring of implementation and effectiveness of mitigation measures
- SHEQ Auditing and management – allow for tracking of audit results and follow up on audit findings
- Intelligent Reporting tool – to enable trend analyses; comparisons etc.
- SHE Legal appointments and organograms generation – according to preset templates
- Hazard and risk reporting in real time – ability to both desktop and smart phone platforms for risk reporting
- SHE Legal register module (this should link to the risk assessments and be able to be drawn in under legal references)
- SHE Representative monthly inspections template generation – electronic routing for signatures, link to CAR and Archibus systems
- SHE Committee meetings – scheduling, minute taking, tracking of attendees - tracking of actions from meetings.

- Management by Walk About (MBWA) smart tool – scheduling, link to CAR system and Archibus, in real time smart phone platform – tracking of actions not registered on CAR system or Archibus.
- Process Safety Management module (link to Process mapping tool)
- Behavioral/Cultural SHEQ based module - functionality should allow user to conduct surveys, log observances and provide reports
- Training component to display matrix, track training, generate reminders, schedule, generate certificates of attendance
- Incident management module – trend analysis, graph generation, lessons learned
- Integrated management systems as per ISO 9001, 14001 and 45001 including the ability to reflect/manage organisational processes and the associated risks, opportunities, hazards and impacts. (link to Process Mapping tool)
- Emergency preparedness - scheduling; drill report generation; automatic raising of corrective actions for findings
- Repository and document management component - ability to store documents, records and provide version control, document number, etc. (link to Process Mapping tool)
- Occupational Health Medical Records - On-line management of employee medical records and health information
- Medical surveillance module – scheduling, sending emails, reminders, confidential patient records – link to HR systems - ability to create electronic medical files for each staff member ( custom template to be provided) Ensuring the security and confidentiality of medical information will be critical.
- On-line registration system for completed Health Risk assessments
- Business Intelligence Module - provision of dashboards that will allow for trend analysis
- Populating and Updating Waste Inventories– on-line customizable inventories that can be populated by users as required
- Occupational Hygiene module - ability to load reports, schedule testing as per legal requirements, generate compliance certificates and provide statistics on assessments done

### **5.2.2 Risk Management facilitating:**

- step by step enablement of ERM in our organisation,
- best practice methodology within our organisation,
- an up to date picture of our risk universe,



- continuous monitoring of our risk universe,
- improved quality and consistency of our information,
- reporting at the click of a button,
- accountability and ownership of risk throughout our organization,
- a culture of risk and control within our organisation,
- the coordinated achievement of our strategic vision.

### **5.2.3 Compliance facilitating:**

- the management of our regulatory universe by rating and monitoring compliance to the acts, regulations and provisions at every level of the organisation, where applicable,
- the documentation of risks associated with compliance / regulatory requirements and the ability to link the relevant sections of acts and/or policies / procedures to these risks,
- automation of Checklists (acts and legislation checklists) supplied by 3rd party compliance providers,
- the monitoring of compliance utilising surveys and the capturing and monitoring of live action plans where there is non-compliance.

### **5.2.4 Audit (Internal, External and Forensic auditing) facilitating:**

- risk and control based auditing ensuring that risks that matter to the organisation are audited and that the results are updated back into risk management,
- the standard Internal Audit process of planning, execution, reporting and follow-up,
- centralised audit management framework which automates and manages the entire audit life cycle, from planning and scheduling audits to developing standard audit plans, collecting field data, generating audit reports with findings, and implementing audit recommendations and remediation,
- Audit activity management reports and timesheets,
- Project management dashboard for tracking progress on all audit projects,
- Customised final audit reports and audit committee reporting at the click of a button,
- Live tracking of progress on management action plans,
- Quick and easy follow-up reviews,
- Increased audit coverage,
- Reduced audit time and cost.

***The tool should have the capacity to be linked and integrated with other CSIR technology platforms. (Further technical details will be discussed at the briefing session)***

## **6 FUNCTIONAL EVALUATION CRITERIA**

- 6.1** 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 and demonstration of the software package to be delivered by the bidder.
- 6.2** 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.
- 6.3** Bidders who proceed to the second phase will each be allocated 30 minutes to present their proposal and will be expected to respond to clarity seeking questions posed by the committee member(s).
- 6.4** 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.
- 6.5** The bidding companies who qualify for the second phase of evaluation will be notified in advance of the date and venue of the presentations.
- 6.6** Bidders 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.
- 6.7** 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.**
- 6.8** 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
<b>Experience</b>	<b>Company Experience</b>	<b>5</b>
	Number of years the company has been rendering/developing SHEQ/RISK software services.	
<b>Methodology</b>	<b>Proposed Methodology and Approach</b>	<b>50</b>
	The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. A detailed approach, methodology, project implementation plan and tools on how they will assist CSIR in achieving the objectives of this request must be provided.	50
<b>Technical</b>	<b>Technical Approach</b>	<b>50</b>
	The service provider must clearly demonstrate how the software package will meet the requirements as set out in this document	
<b>Client References</b>	<b>Reference letters (Refer to Annexure B)</b>	<b>5</b>
	The service provider must have dealt with large organisations of at least 2000 employees and must provide at least three written references.	5
<b>Total</b>		<b>100</b>

## Phase Two

Evaluation Criteria	Description	Weight
<b>Presentations</b>		<b>100</b>
	<ul style="list-style-type: none"> <li>Bidder to deliver a demonstration of the proposed system in line with CSIR's requirements as outlined in the scope of service ( 5.2 above)</li> </ul>	
<b>Total</b>		<b>100</b>

**6.9** 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.

**6.10** 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.**

## **7 ELIMINATION CRITERIA**

Proposals will be eliminated under the following conditions:

- Submission after the closing date;
- Submission at the incorrect email address;
- Failure to submit proof of ownership/distribution rights for the software programme/online tool;
- Bidders who are restricted by National Treasury;
- Non-attendance of the compulsory briefing session.

## **8 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](http://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**

### **9 PROCEDURE FOR SUBMISSION OF PROPOSALS**

- 9.1** All proposals must be submitted electronically to [tender@csir.co.za](mailto:tender@csir.co.za)
- 9.2** Respondents must use the RFP number as the subject reference number when submitting their bids.
- 9.3** The e-mail and file sizes should not exceed a total of 30MB per e-mail.
- 9.4** The naming/labeling syntax of files or documents must be short and simple
- 9.5** All documents submitted electronically via e-mail must be clear and visible.
- 9.6** All proposals, documents, and late submissions after the due date and time will not be evaluated.
- 9.7** 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**

### **10 DEADLINE FOR SUBMISSION**

Proposals shall be submitted at the address mentioned above no later than the closing date of 26 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.

### **11 TENDER PROGRAMME**

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

- Issue of tender documents: Friday, 09 July 2021
- Compulsory briefing session: Friday 16 July 2021 2021
- Last date for submission of queries: Monday 19 July 2021
- Closing / submission Date: Monday 26 July 2021

### **12 AWARDING OF TENDERS**

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.

## 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 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.
- In addition to the financial offer and preference evaluation, the Tenders having the highest ranking/number of points will additionally be reviewed against the points listed as objective criteria in terms of PPPFA Regulation 2017 in order to ascertain suitability for award.

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.*

### 13.3 Objective Criteria

If having passed responsiveness, the tenderer will again be reviewed on visit(s) to the tenderer's client(s) where the proposed tool is currently being used. Refer to **Annexure F** for system components/functionality to be assessed during client site visit(s).

## 14 PRICING PROPOSAL

- 14.1 Pricing proposal must be cross-referenced to the sections in the Technical Proposal.
- 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 six (06) 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 ***"RFP No: 3471/26/07/2021 - 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** 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 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.
- 22.3** 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.

## **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 R1, 400.00 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 tender validity period;

**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.

## 28 DECLARATION BY TENDERER

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

**RFP No: 3471/26/07/2021**

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. 3471/26/07/2021** 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 .....  
Name .....

.....  
Signature          Date

2 .....  
Name .....

.....  
Signature          Date

## 29 ANNEXURE A

Functional Factors	Proof Required	Weighting	0	5	7	10
<b>Company Experience</b>  Number of years the company has been rendering/developing SHEQ/RISK software services.	Company profile clearly indicating the number of years in business providing software development services	5	Less than 5 years	5 - 6 years	7 – 10 years	More than 10 years
<b>Client references.</b>  The service provider must have dealt with large organisations of at least 2000 employees	At least three written references (3) to be supplied. Must have dealt with large organisations (Generic)	5	Less than 2 references provided, or references are not for large organisations	3 positive references provided	4 – 5 positive references provided	More than 5 positive references provided
<b>Technical Evaluation</b>	The service provider must clearly demonstrate how the software package will meet the requirements as set out in this document	50	Software package did not meet requirements	Software package meets some of the requirements but not all	Software package meets most of the requirements but not all	Software package provided fully meets the requirements
<b>Methodology and Approach</b>	The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. A detailed approach, methodology, project implementation plan and tools on how they will assist CSIR in achieving the objectives of this request must be provided.	40	Non-submission or poor methodology and project plan submitted	Approach is generic and not tailored to suit the requirements.	Approach is specifically tailored to suit the requirements and will meet the needs. The tools that will be used for the project are indicated	The approach is innovative and well-articulated. The tools that will be used for the project are indicated. Project implementation plan is detailed and clear

**Second phase (Bidder Presentation)**

No.	Criteria	Points allocation	Weight
1	Proposed system/tool demonstration.	<p><b>0 points</b> – Poor tool which does not meet requirements.</p> <p><b>5 points</b> – The proposed tool is generic and not tailored to requirements.</p> <p><b>7 points</b> - The tool is specifically tailored to suit the requirements and will meet the needs.</p> <p><b>10 points</b> – The tool is innovative and well-articulated. Project implementation plan is detailed and clear.</p>	100%
	<b>Total</b>		100%

### 30 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 ownership or licensed distributor of software package – <b>(Provide certificate)</b>		
Proof of registration or license for related training information/software licensing – <b>(Provide certificate)</b>		
<b>Company Experience– (Company Profile)</b>  Number of years the company has been rendering The company must have not less than 5 years’ development, implementation and training in medium to large organisations. Detailed company profile must be submitted.		
<b>Company References – (Client reference letters)</b>  The service provider must provide evidence that they have successfully Developed, implemented and trained staff on the software package. At least three references (3) to be supplied in writing. Must have dealt with large organisations (Generic). No letters from other service providers will be accepted as these do not elaborate on bidder’s workmanship and work ethic. As part of the evaluation process the bidder may be required to set up a meeting with a current client in order to witness the software package in action.  Reference letters must be provided to substantiate such claims. In addition to reference letters, the reference form, <b><u>Annexure C MUST be completed for each reference provided.</u></b>  In addition to the below requirements, the references letters must have the following details: <ul style="list-style-type: none"> <li>• The reference letter must be in official client company letterhead;</li> </ul>		

<ul style="list-style-type: none"> <li>• The reference letter must be from different entities</li> <li>• The Reference letter must indicate the description of the services and date of the service provided, and value of the transaction or contract.</li> <li>• The reference letter must have email address and telephone number.</li> </ul>		
<b>Methodology and Approach including Work plan/timelines –</b> <b><i>(Detailed Methodology, Approach and Gantt Chart)</i></b>  The service provider must explain their understanding of the objectives of the project, approach to the project and the methodology for carrying out the implementation of the software package. This will include the main activities of the project, their content and duration, phasing and interrelations, milestones, and delivery dates of the actions. The proposed project plan should be consistent with the approach and methodology.		

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

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



### 31 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: .....

**IN ADDITION TO REFERENCE LETTERS, THE FORM MUST BE COMPLETED FOR EACH REFERENCE SUBMITTED (FORM TO BE COMPLETED BY REFEREE AND NOT BIDDER)**

## 32 ANNEXURE D – PRICING SCHEDULE

### 32.1 SCOPE OF SERVICE

Service Component	Year 1 (Excl. VAT)	Year 2 (Excl. VAT)	Year 3 (Excl. VAT)
Software licensing for users (super, administrator, normal user)			
Training for staff/end users Per/ head at different levels <ul style="list-style-type: none"> <li>- Super users</li> <li>- Administrators</li> <li>- End users</li> </ul>			
Software updates ( annual)			
Programme Management and support			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

### 32.2 CONSULTATION SERVICES – RATE PER HOUR

Service Component	Year 1 (Excl. VAT)	Year 2 (Excl. VAT)	Year 3 (Excl. VAT)
Consultation and customization of services offered (rate per hour)			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

### **33 ANNEXURE E SBD1 FORM**

## **34 ANNEXURE F - CLIENT SITE VISIT CHECKLIST**