

Request for Proposals (RFP)

For a Benchmarking study on staff productivity measures appropriate for the CSIR.

RFP No. 965/08/10/2021

Date of Issue	Thursday, 16 September 2021	
Compulsory Briefing Session	Date: Monday, 27 September 2021 Venue: Virtual–Microsoft Teams Time: 12H30 – 13H30 Access link: https://teams.microsoft.com/l/channel/19%3arGU98t22vxDBtE_P6O574h5TmPv5HgYYFmlseQbtBzw1%40thread.tacv2/General?groupId=1900d55d-599a-47a5-acef-1fcffec6c0b0&tenantId=2fd3c5d5-ddb2-4ed3-9803-f89675928df4	
Closing Date	Friday, 08 October 2021 at 16:30	
Electronic submission	Email: tender@csir.co.za If the size of the documents exceed 25MB, send multiple emails. Use the tender number and description as the subject on the email.	
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 several regional offices.

2 BACKGROUND

The CSIR unveiled its new vision, mission, strategic objectives, and focus areas and has just completed its second 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.

To achieve its strategy and objectives, the CSIR requires a staff compliment that is fully engaged and productive, working efficiently and effectively for most of the time. **As such, the CSIR needs a tool or a measure of productivity that enables the CSIR to determine (1) whether the full staff compliment (both line and support) are working productively (i.e. efficiently, effectively and making full use of all resources) and (2) to enable the leadership and management cadre to step in and resolve any issues timeously that may hinder productivity.** The measure needs to be relatively simple to implement and must add value to both staff and leadership to rectify any areas of concern speedily, without being too labour intensive to gather the information/data required.

Currently, the **CSIR uses timesheet inputs** as a proxy for measuring productivity based on timesheet inputs on attributable projects (e.g. contract projects and income bearing projects) and non-attributable projects (e.g. administration projects or non-income bearing projects). This tool has shown several shortcoming/gaps/concerns as a measure of productivity, and as such, is not bought into by staff overall. It is easy to manipulate, and seldom viewed as an accurate assessment tool of productivity.

Productivity can be defined: *“a ratio between the output volume and the volume of inputs. In other words, it measures how efficiently production inputs, such as labour and capital, are being used to produce a given level of output.*

In CSIR, measuring productivity is extremely complex since there is a range of inputs (support costs (staff and other), expenses, manpower costs, CAPEX, etc.) and a range of outputs (Publication Equivalents (PE)s, Technology demonstrators (TDs), patents, projects/reports, growing SMMEs, brand awareness, Human Capital Development, income, etc.) – giving rise to multifactorial productivity indexes.

Given this situation, the CSIR has decided to **benchmark** the CSIR practises with other Research and Technology Organisations (RTOs) / Science Councils to see how they typically measure productivity, with a view to **gleaning best practices** that CSIR can adopt from other similar world-class organisations. The methodology used needs to be aligned with an RTO such as the CSIR and practical to implement. It should provide a set of

measures that measure productivity taking efficiency, effectiveness and quality into account for a knowledge worker environment.

It is to this end that the CSIR would like to engage a service provider to conduct a benchmarking study to determine best practice in a knowledge worker environment, of a good measure (s) for assessing staff productivity levels at an individual level, and that incorporates both support and line staff.

3 INVITATION FOR PROPOSAL

Comprehensive proposals are hereby invited for conducting a **brief desktop benchmarking** study to determine best practice for a **knowledge worker environment** for measuring individual productivity levels. 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 several 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. *Such organisations that could be appropriate to consider (similar to CSIR) include science councils in South Africa, the National Research Council Canada (CNRC-NRC), Netherlands Organisation for Applied Scientific Research (TNO), Commonwealth Scientific and Industrial Research Organisation (CSIRO) in Australia, Technical Research Centre in Finland (VTT), Fraunhofer-Gesellschaft in Germany, National Service for Industrial Training (SENAI) in Brazil, Singapore Institute of Manufacturing Technology (SIMTech), Hatch Consultancy and Zutari Consultancy.*

The project should not take more than thirty (30) days to complete.

4 PROPOSAL SPECIFICATION

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

4.1 Minimum Technical Proposal

The following content for a **technical proposal** is expected:

- a) A description of the global best practice and recommended methodology for the CSIR including:
- i. The definition of productivity used in understanding resource work load and resource levelling / scheduling practice for RTOs/Research based organisations/Research Consultancies for individuals (both research staff and support staff) being used as a basis in this study.
 - ii. Benchmarking a minimum of five global RTOs/ Research based organisations/ Research Consultancies wrt individual productivity measures (both research staff and support staff) used to understand resource work load and application in resource levelling / scheduling.
 - iii. Identify the pros and cons of these measures of productivity and work load at the individual level (both for research and support staff) and its application in resource levelling / scheduling for each of the identified organisations.
 - iv. Identify the tools/systems for measuring productivity and work load at the individual level (both for research and support staff) and its application in resource levelling / scheduling used by each of the identified organisations, indicating approximate cost of the system and if it is customised or an off the shelf system.
 - v. An evaluation of what can be considered the best approach(es) providing a comprehensive rationale for this evaluation, for measures of individual productivity, individual work load and effective application in resource levelling / scheduling for both research and support staff.

4.2 SCOPE OF SERVICE

The service provider is expected to conduct a **rapid benchmarking study** to determine **global best practice** in a knowledge worker environment **for measuring individual productivity levels, work load** and its application for **resource levelling / scheduling** for both the researchers and support staff of the CSIR, taking into consideration of the business environment of the CSIR. The CSIR also 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.

4.3 DELIVERABLES

The CSIR requires the following deliverables:

- a) *Benchmark report* for assessing productivity and resource levelling / scheduling of staff at an individual level in a knowledge worker environment.
- b) *An evaluation* of these benchmarks to determine and motivate best practice(s).
- c) A *recommended approach* for CSIR along with proposed tools/methodologies/systems required.

The above should be compiled into a single technical report (further details provided under minimum technical report content).

For the service provider to fully assess the viability and value addition, the service provider must:

- Familiarise themselves with the mandate, vision, mission, and strategy of the CSIR and understand the operating environment of the CSIR.
- Fully understand the nature and business of RTOs and research-based organisations such as the CSIR.

4.4 QUOTATION REQUIREMENTS

- The service provider must have prior experience in benchmark studies related to the staff productivity measures, resource loading, and /or resource levelling / scheduling. A **minimum of three** similar studies and references must be provided for an eligible quote.
- The CSIR seeks a reputable and well-established service provider with extensive **rapid benchmarking study experience**. The service provider must illustrate a **minimum of 3 years' experience** in the provision of benchmarking services to industry.
- The CSIR requires a rapid delivery of the service and explicit confirmation in the quote that the study can be completed within 1 month (30 days) after being notified and contracted as a successful bidder.
- An eligible quote must provide a clear description of the method to be followed which includes the engagement plan with both the CSIR and the specific RTO's to be benchmarked.
- The CSIR reserves the right to request clarity and further documentation relevant to the RFP during the evaluation process.

5 FUNCTIONAL EVALUATION CRITERIA

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

Evaluation Criteria	Description	Weight
Technical	Qualification and Experience of Organization and Team	30
	<ul style="list-style-type: none"> • <u>Experience</u> of the service provider in conducting such a benchmarking study and the evaluation thereof. • <u>Qualifications</u> of the lead individual working with organizations to do such benchmarking exercises and analysis. • <u>Experience</u> of the lead individual in managing similar projects in organisations similar to the CSIR. <p>Note: Should there be no evidence of a specific benchmarking study, a very strong motivation would need to be brought to demonstrate that any other experience would be deemed valid. This will be up to the discretion of the CSIR evaluation panel to consider the strength of the motivation.</p>	10 10 10
Technical	Proposed approach	40
	<ul style="list-style-type: none"> • Methodology or approach to the benchmarking study, analysis, evaluation and recommendation. A list of RTOs / Research based organisations / Research Consultancies, similar to CSIR, that would be used in the analysis for benchmarking. 	40
Value Adds	New/innovative and value-added approaches to service delivery	20
	<p>The bidder provides value added and various innovative service delivery approaches.</p> <ul style="list-style-type: none"> • Bidder provides <u>additional value-adds</u> in terms of know-how, tools and resources, expedient design and development process, low cost, customer services, and various innovative service delivery approaches, including the use of technology. 	
Client References	Reference letters	10
	<ul style="list-style-type: none"> • The service provider must have not less than 3 references where similar benchmarking or studies of a similar nature were conducted in organisations of a similar nature/stature to the CSIR, in the past 10 years. Should there be no evidence/reference of a benchmarking study, a very strong motivation would need to be brought to demonstrate that any other references be deemed valid. 	
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. **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;
- Proposals not submitted in accordance with the specific requirements laid out in this document;
- Non-attendance of the compulsory online briefing session.
- National Treasury Restricted Suppliers

7 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION

Before any negotiations will start with the winning bidder it will be required from the winning bidder to:

- be registered on National Treasury’s Central Supplier Database (CSD). Registrations can be completed online at: www.csd.gov.za;
- provide the CSIR of their CSD registration number; and
- have its tax affairs in good standing with the South African Revenue Service (SARS).
- No points will be scored during the evaluation process if the supplier do not provide the CSIR with a valid certified copy of their B-BBEE certificate or sworn affidavit. B-BBEE certificate must be issued by SANAS accredited agency or a valid sworn affidavit in line with DTI regulations. (RSA suppliers only).
- If no certificate can be provided, no points will be scored during the evaluation process.

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 25MB 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 email address mentioned above no later than the closing date of **Friday, 08 October 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: Thursday, 16 September 2021
- Compulsory briefing session: Monday, 27 September 2021
 - **Venue:** Virtual–Microsoft Teams
 - **Time:** 12H30 – 13H30, **Access link:**
https://teams.microsoft.com/l/channel/19%3arGU98t22vxDBtE_P6O574h5TmPv5HgYYFmlseQbtBzw1%40thread.tacv2/General?groupId=1900d55d-599a-47a5-acef-1fcffec6c0b0&tenantId=2fd3c5d5-ddb2-4ed3-9803-f89675928df4
- Closing / submission Date: Friday, 08 October 2021 at 16:30

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**,
- 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 965/08/10/2021 Benchmarking study on staff productivity measures appropriate 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** The CSIR requires that all bids be submitted electronically to CSIR at tender@csir.co.za.
- 20.3** Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

21 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: 965/08/10/2021

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. 965/08/10/2021** 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 FUNCTIONALITY EVALUATION SCORE SHEET

No.	Criteria	Proof required	Points allocation	Weight
1	<p>Qualification and experience of Service provider/and or Team. The service provider must have demonstrated in conducting such a benchmarking study and the evaluation thereof in organisations like the CSIR (government, research councils, private sector or parastatals).</p> <ul style="list-style-type: none"> The <u>team leader</u> must have <u>not less</u> than 3 years' experience in benchmarking studies. Experience in working with organisations similar in nature to the CSIR in the past 3 years would be a strong advantage. The <u>team leader</u> must hold an appropriate qualification. <u>Experience</u> of the service provider in conducting such a benchmarking study and the evaluation thereof. 	<p>CV of lead individual <u>explicitly</u> indicating the number of years doing similar benchmarking studies in similar organisations.</p> <p>Level of experience of leader clearly articulated.</p> <p>Experience to include benchmarking, evaluating tool(s) for organizations that successfully meet the needs of the client organization.</p> <p>Qualification(s) of leader must be indicated.</p> <p>Organisation's experience in benchmarking studies.</p>	<p>0 points – Team leader has no relevant experience</p> <p>5 points – Team leader has three –five years' relevant experience</p> <p>10 points – Team leader has six or more years' relevant experience</p> <hr/> <p>0 points – Lead individual is not appropriately qualified as specified.</p> <p>5 points – Lead individual has a relevant degree or equivalent as specified in criteria.</p> <p>10 points – Lead individual holds a postgraduate degree or higher development.</p> <hr/> <p>0 points – The organisation has < 3 years experience</p> <p>5 points – The organisation has three to five years' experience</p> <p>10 points – The organisation has five or more years' experience</p>	30%
2	<p>Proposed Approach. 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 times. Detailed costing is critical. A list of RTOs / Research based organisations / Research Consultancies, similar to CSIR, that would be used in the analysis for benchmarking.</p>	<p>Detailed Methodology, Approach and Gantt Chart/timeline</p> <p>Methodology to provide for</p> <ul style="list-style-type: none"> Benchmarking Evaluation & reporting Recommendations for best practice/ tools/ systems and processes. A list of RTOs / Research based organisations / Research Consultancies, similar to CSIR, that would be used in the analysis for benchmarking. 	<p>0 points – Non-submission or proposal does not address the scope of the assignment</p> <hr/> <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; a list of at least five RTOs / Research based organisations / Research Consultancies, similar to CSIR, to be used in the analysis for benchmarking, the sequencing of activities indicate the bidder understand the requirements.</p> <hr/> <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, a list of at least seven RTOs / Research based organisations /</p>	50%

			<p>Research Consultancies, similar to CSIR, to be used in the analysis for benchmarking, 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, a list of at least ten RTOs / Research based organisations / Research Consultancies, similar to CSIR, to be used in the analysis for benchmarking, 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	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 adds meets CSIR's expectations</p> <p>10 points – bidder proposed innovative value adds more than exceed the expectations of the CSIR</p>	10%
4	References The company must have not less than 3 references confirming benchmarking studies 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 	<p>0 points – < 3 references</p> <p>5 points – 3-5 references</p> <p>10 points – >5 references</p>	10%
	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			
Company References – (Client reference letters or Completed reference form- Annexure C) 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. <i>Annexure C to be completed by the referee and not the bidder.</i>			
Methodology and Approach including Work plan/timelines – (Detailed Methodology, Approach and Gantt Chart- refer to paragraph 28) The service provider must explain their understanding of the objectives of the assignment, approach to the assignment, list of RTOs to be benchmarked against CSIR 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.			
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 is required.		
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		
Methodology or approach to the benchmarking study, list of RTOs to be benchmarked against CSIR, analysis, evaluation and recommendation		
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.		Sum	1		
2.		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	