



GAUTENG
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REQUEST FOR PROPOSAL

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE VALIDATION OF EMPLOYEES' PERFORMANCE RATINGS AGAINST PORTFOLIO OF EVIDENCE SUBMITTED FOR EXECUTIVES, SENIOR MANAGERS, MIDDLE MANAGERS, SUPERVISORS AND SPECIALISTS AND VALIDATE THE FINANCIAL IMPLICATIONS OF THE ANNUAL PERFORMANCE RATINGS ON BEHALF OF THE GPL FOR A PERIOD OF TWO YEARS

RFQ NO: PR10063965

CLOSING DATE: 02 DECEMBER 2024

TIME: 11:00 AM

RFQ SUBMISSION: VLetshokota@gpl.gov.za

These are documents required for this bidding. Should the bidder fail to submit the following documents, the bid will be disqualified automatically:

Item	Description	Mandatory	Submitted	
			Yes	No
1	Technical Proposal	Yes		
2	Bidder's Disclosure (SBD 4) Original completed and signed.	Yes		
3	Preference Point Claim form (SBD 6.1) Original completed and signed.	Yes		
4	Did you submit valid proof of registration with Institute of Internal Auditors of South Africa (IIASA) for team leader & team members?	Yes		
5	Did you submit copies of full Company Registration documents?	Yes		
6	Did you submit copies of South African IDs' for shareholders?	Yes		
7	Did you submit your company profile?	Yes		
8	Did you submit a detailed CSD report and SARS Issued PIN?	Yes		
9	Did you submit one (1) electronic copy of the RFQ ?	Yes		
10	Joint Venture / Consortium agreement / Trust Deed (if applicable): <ul style="list-style-type: none"> • Did you submit all documents for all parties of the Joint Venture/Consortium/Trust Deed? ✓ Certified copies of shareholders certificates ✓ Certified copy of Company Registration documents ✓ Certified copy of ID documents of the Directors or Members 	Yes		

Service Provider's Name:.....

Completed by:.....

Signature:.....



**Session Non-Compulsory Virtual Briefing
(Declaration of Attendance)**

Section 2

BID NUMBER: RFQ10063965

BID DESCRIPTION: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE VALIDATION OF EMPLOYEES' PERFORMANCE RATINGS AGAINST PORTFOLIO OF EVIDENCE SUBMITTED FOR EXECUTIVES, SENIOR MANAGERS, MIDDLE MANAGERS, SUPERVISORS AND SPECIALISTS AND VALIDATE THE FINANCIAL IMPLICATIONS OF THE ANNUAL PERFORMANCE RATINGS ON BEHALF OF THE GPL FOR A PERIOD OF TWO YEARS

BID CLOSING DATE : 02 DECEMBER 2024

CLOSING TIME : 11H00am

NON-COMPULSORY BRIEFING SESSION: YES

Venue: Microsoft Teams

Date: 29 NOVEMBER 2024

Time: 11h00am

I/We hereby declare that I/we attended the non-compulsory briefing session to understand the requirements of the GPL to supply all or any of the supplies and/or to render all or any of the services described in the attached bid documents, on the terms and conditions and in accordance with the specifications stipulated in the bid documents.

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED AT THE NON-COMPULSORY BRIEFING SESSION WAS UNDERSTOOD.

<p>SIGNATURE OF BIDDER OR ASSIGNEE(S)</p> <p>.....</p>	<p>DATE:</p>
--	---------------------------

Position

Name Bidder

Name of Company.....

SIGNATURE OF GPL OFFICIAL _____

DATE: _____

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:
.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement, or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements, or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements, or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature	Date
.....
Position	Name of bidder

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- ✓ the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- ✓ The applicable preference point system for this tender is the 80/20 preference point system. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.3 The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.4 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.5 The Gauteng Provincial Legislature reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive

tendering process or any other method envisaged in legislation;

- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) \quad \text{or} \quad Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

80/20 *or* *90/10*

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$P_s = 80 \left(1 + \frac{80/20 (P_t - P_{max})}{P_{max}} \right) \quad \text{or} \quad P_s = 90 \left(1 + \frac{90/10 (P_t - P_{max})}{P_{max}} \right)$$

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The 20 preference points will be distributed as follows:

#	GROUPING	POINTS	VERIFICATION
1	HDI	12	
1.1	Black owned	6	Registration Documents and ID Copy
1.2	Women	3	Registration Documents and ID Copy
1.3	PWDs	3	Letter from the Doctor
2	Youth	4	ID Copy
3	Locality	4	Letter from Ward Councillor or Tribal Authority or Affidavit or Lease Agreement
	TOTAL	20	

5. DECLARATION WITH REGARD TO COMPANY/FIRM

5.1 Name of company/firm.....

5.2 Company registration number:

5.3 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company

State Owned Company [TICK APPLICABLE BOX]

5.4 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:
DATE:
ADDRESS:

1. INTRODUCTION

- 1.1 The Gauteng Provincial Legislature conducts validation of the Portfolio of Evidence submitted to validate annual performance appraisal ratings awarded and inform the rewards to be paid to each employee. This process provides assurance to the Executives and Executive Authority to confirm that all the validated performance ratings, recommendations and associated financial implications were verified by an independent body and are accurate.

2. BACKGROUND

- 2.1 The Gauteng Provincial Legislature seeks an independent service provider for the validation of employee's performance ratings against a portfolio of evidence submitted with a view of receiving reports from the service provider for the Executive Management; Senior Management; Middle Management and Supervisory occupational groups. The independent validation and verification exercise is required for two (2) performance cycles, i.e., 2023/24 and 2024/25 as well as the 2021/22 and 2022/23 performance cycles appeal. This process is governed by the Integrated Performance Management Systems Policy and the validated information is applied to inform the annual performance appraisals and the associated performance incentives.

3. OBJECTIVES

- 3.1 To appoint a suitable and competent service provider to validate the employee performance appraisal ratings against the Portfolio of Evidence submitted for the Executives, Directors, Senior Managers in the P03 to P06 grades; as well as Middle Managers, Specialists and Supervisors in the P07 to P08 grades.
- 3.2 To verify the accuracy of the projected performance incentives emanating from the validated performance ratings.
- 3.3 To prepare and issue performance validation reports for the Executive Directors, Directors and Senior Managers in the P03 to P06 grades; as well as Middle Managers, Specialists and Supervisors in the P07 to P08 grades. The reports must be signed by the Chief Risk and Audit responsible for the project and be submitted to the GPL within the prescribed time frames.

4. SCOPE OF WORK

- 4.1 Conduct a validation of employee's performance ratings against the portfolio of evidence of:
 - 4.1.1 Thirty (30) Executive and Senior Management employees.
 - 4.1.2 Ninety-three (93) Middle Management and Supervisory employees

4.2 The service provider is expected to submit three preliminary reports within a period of six weeks. The first report will be for the Executives. The second report will be for the Senior Management team. The third report will be for the Middle Management, Specialist and Supervisors. Once Management has completed the review of the preliminary reports, the service provider will be requested to submit final drafts of the reports. The service provider must provide three final performance validation reports within the agreed timeframe as follows:

4.2.1 Report to cover all Middle Management and Supervisory employees in the P07 to P08 grades.

- 4.2.2 Report to cover Senior Management employees in the P05 to P06 grades, and
- 4.2.3 Lastly a report that should contain performance validated information for Executives in the P03 to P04 grades.
- 4.2.4 Three final draft reports should be submitted within a maximum period of six weeks for each of the performance cycles. This period may be extended by the GPL should there be additional work required on the part of the service provider

- 4.3 The service provider should submit spreadsheets indicating the validated performance ratings for each employee. Such validation should have been conducted in line with the Integrated Performance Management System (IPMS) policy.
- 4.4 The service provider is expected to calculate the annual performance review ratings, in line with the Remuneration and Benefits Policy for each employee based on the supporting documentation received from the GPL.
- 4.5 The Service Provider must also validate the rewards based on the final ratings.
- 4.6 The service provider is expected to table the required reports to relevant GPL GOVERNANCE structures as may be required.
- 4.7 The service provider is expected to provide sufficient and properly qualified resources to conduct the work.

5. ROLES AND RESPONSIBILITIES

5.1 The GPL reserves the right not to appoint or to appoint one or more service providers for this project

5.1.1 The role of the GPL

- 5.1.1.1 To provide the service provider with relevant electronic copies of employee's individual balanced scorecards and portfolio of evidence for the 2023/24 FY and 2024/25 FY as well as the 2021/22 and 2022/23 appeals.
- 5.1.1.2 To provide the service provider with the Integrated Performance Management Systems Policy and the Remuneration and Benefits Policy.
- 5.1.1.3 To receive, review and sign-off reports on the validated information.
- 5.1.1.4 To receive spreadsheets, review and sign-off indicating the outcomes of the validation
- 5.1.1.5 To table reports to the relevant structures.
- 5.1.1.6 To sign Non-Disclosure Agreement with the successful service provider

5.1.2 The role of the service provider

- 5.1.2.1 To acquaint themselves with the relevant policies and procedure manuals pertaining to the assignment.
- 5.1.2.2 To acquaint themselves with the Annual Performance Plan, Annual Reports and Strategic Objectives for the assignment to be executed seamlessly.
- 5.1.2.3 To provide independent reports on the outcome of the validation of Employee's performance rating against the portfolio of evidence for all employees in the Executive Management; Senior Management; Middle Management and Supervisory occupational levels for the 2023/24 FY and 2024/25 FY as well as the 2021/22 and 2022/23 IPMS appeals.
- 5.1.2.4 To provide reports that contain details of the method and scope of validation and assurance

that the validation was performed in accordance with Standards of Auditing and by a qualified auditor.

5.1.2.5 To ensure that the reports are signed by the auditor responsible stating the title before submission to the GPL. Only reports written in English will be accepted by the GPL.

5.1.2.6 To prepare and present reports in hard and soft copy (in Ms. Word and/or Ms. Excel and PDF format) for circulation to the relevant Gauteng Provincial Legislature (GPL) stakeholders.

5.1.2.7 The Service Provider must sign Non-Disclosure Agreement with the Gauteng Provincial Legislature

5.1.2.8 To provide adequate and competent capacity (Human capital) for the scope of work required.

6. REQUIRED COMPETENCIES

6.1 The service provider must have at least five (5) years' experience in conducting performance validation and performance management processes utilizing the Balance Scorecard methodology. The Service Provider must provide CVs of the team to confirm the experience in conducting similar work in other organisations.

6.2 The team members must have a minimum of seven (5) years' experience in conducting performance validation to undertake this assignment.

6.3 The Team Leader must have at least seven (7) years' experience of validation of performance reviews and supporting Portfolio of Evidence.

6.4 The team members and the Team Leader must be qualified Internal Auditors registered with the Institute of Internal Auditors of South Africa (IIASA). This is a mandatory requirement which must be proven with proof of registration with the IIASA

6.5 The team must have knowledge of performance management disciplines.

7. KEY ASSUMPTIONS

7.1 The GPL will perform all actions and submit all the required information to enable the service provider to fulfil their contract obligations. This may include the provision of relevant documents, and available data as may be required by the service provider for purposes of fulfilling their contract obligations and provided it is available and accessible.

7.2 The work will be completed as per scope and time, without any delays on the part of the service provider.

7.3 The service provider and assigned individuals have prerequisite qualifications, competencies, and experience to perform work assigned to them.

7.4 GPL will not incur any additional cost because of timeline extension on the part of the service provider.

7.5 Project scoping meeting will be held at the beginning of the project to brief the Service Provider

7.6 The Service Provider is expected to scope the project and submit a proposal in line with the contract.

7.7 Progress meetings will be held during the life cycle of the project.

8. PERIOD OF THE ASSIGNMENT

The service provider should commence and complete the assignment within a period of two years from date of award.

9. EVALUATION CRITERIA

9.1 The GPL needs to be satisfied, in all respects, that the service provider selected has the necessary resources, qualifications and abilities for this project, and that all submissions are regarded in a fair manner in terms of evaluation criteria and process. The 80/20 Preference Point system will be applied to evaluate the received proposals, the process of which shall be done in the following phases:

9.1.1 Phase 1: Administrative Compliance (Preliminary Evaluation)

9.1.1.1 To be conducted by SCM to confirm compliance and completeness of documents, i.e., Tax compliance, completed standard bidding documents as per the tender document and other documentation that might have been required for the tender (e.g., ID copies, samples etc). Only those proposals whose compliance is in order will move to **Phase 2 (Evaluation on functionality)**.

9.1.2 Phase 2: Functionality Evaluation Criteria (100)

9.1.2.1 This phase measures the capability and capacity of the service provider to deliver on the assignment. The below criterion will be applied to score the proposals from which a service provider must score a minimum of 70 points to be considered for **Phase 3 of the evaluation, i.e., Price and Specific Goals**

FUNCTIONALITY EVALUATION CRITERIA

A key score of 0-5 will be applied where:

0 = Poor; 1= below average; 2 = average; 3 = Satisfactory; 4 = Very Good and 5= Excellent

#	CRITERION	DESCRIPTION	SCORE	WEIGHT								
1	<p>Service Provider Experience in similar projects Provide a Project List and supporting cumulative reference letter(s) from previous clients demonstrating years of experience in executing projects of a similar nature. The Project List must be in the below table format</p> <table border="1" data-bbox="282 796 853 903"> <thead> <tr> <th>Project Description</th> <th>Value</th> <th>Period</th> <th>Client Name</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p>The reference letters must be signed by the referee, contain implementation details for the project, and the duration of the contract.</p> <ul style="list-style-type: none"> • GPL reserves the right to verify the testimonials. 	Project Description	Value	Period	Client Name					<p>A minimum of 5 years' experience in implementing similar projects with supporting cumulative reference (s) letters</p> <p>5 years' experience</p> <p>6 to 9 years' experience</p> <p>10 or more years' experience</p>	<p> </p> <p>3</p> <p>4</p> <p>5</p>	30
Project Description	Value	Period	Client Name									
2.	<p>Project Management Team Provide CVs of the project team as evidence, with 5 years relevant experience. The service provider must have a minimum of four (4) Consultants to carry out the exercise.</p>	<p>The service provider must have a minimum of four (4) Consultants to carry out the exercise.</p> <p>Four Consultants with 5 years' experience to carry out the exercise.</p> <p>Four Consultants with 6 years' experience to carry out the exercise.</p>	<p> </p> <p>3</p> <p>4</p>	15								

FUNCTIONALITY EVALUATION CRITERIA

A key score of 0-5 will be applied where:

0 = Poor; 1= below average; 2 = average; 3 = Satisfactory; 4 = Very Good and 5= Excellent

#	CRITERION	DESCRIPTION	SCORE	WEIGHT
		Four Consultants or more with 7 or more experience to carry out the exercise.	5	
3	Team Leader Experience The team leader must have at least seven (7) years' experience of validation of performance reviews and rewards. A CV must be submitted as proof of experience.	A CV of a Team Leader with 7 - 9 years of experience of validation of performance reviews and rewards.	3	15
		A CV of a Team Leader with 10 years' or more of experience of validation of performance reviews and rewards	5	
4	Proposal of the Performance Management Approach to be applied in the validation of performance reviews and Portfolio of evidence	Comprehensive Balanced Scorecard Performance Management methodology substantiated by two example reports of validated performance ratings against POE and rewards. The reports must include the KPIs, performance ratings and the POE information applied to audit an individual consolidated information and recommendations to the management structures for application during moderation process for approval		30
		Generic performance management methodology and two example reports. The methodology must indicate the Balanced Scorecard perspectives and the SMART principles as applied by the service provider to validate performance ratings against the Portfolio of Evidence and rewards	3	

FUNCTIONALITY EVALUATION CRITERIA

A key score of 0-5 will be applied where:

0 = Poor; 1= below average; 2 = average; 3 = Satisfactory; 4 = Very Good and 5= Excellent

#	CRITERION	DESCRIPTION	SCORE	WEIGHT
		A comprehensive performance management methodology and two example reports. The methodology must indicate the Balanced Scorecard perspectives and the SMART principles as applied by the service provider to validate performance ratings against the Portfolio of Evidence and rewards, as well as comparative analysis between the alignment of performance of employees and organisational performance.	5	
5.	Affiliation to professional bodies The Team Leader and the team must be registered with the Institute of Internal Auditors of South Africa (IIA SA).	The team Lead and minimum of 4 Consultants must be registered with the Institute of Internal Auditors (IIA).		10
		Only four Consultants are registered with the IIA	3	
		Team Leader and a minimum of four Consultants are registered with the IIA	5	
			TOTAL POINTS	100
			CUT OFF POINTS	70

9.1.1 Phase 3: Price and Specific Goals (100)

9.1.1.1 Only bidders that score a minimum score of **70 points and above out of 100 points on Functionality** will qualify for this phase which will determine the bidder (s) to be recommended for approval by the delegated authority. The 80/20 Preference points system will be applied using the below formula to calculate price:

The following formula will be used to calculate the points for price: Criteria	Points
Price Evaluation $Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right) \div \emptyset$	80
Specific Goals	20
TOTAL	100

Where,

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

9.1.1.2 The 20 preference points will be distributed as follows:

#	GROUPING	POINTS	VERIFICATION
1	HDI	12	
1.1	Black owned	6	Registration Documents and ID Copy
1.2	Women	3	Registration Documents and ID Copy
1.3	PWDs	3	Letter from the Doctor
2	Youth	4	ID Copy
3	Locality	4	Letter from Ward Councilor or Tribal Authority or Affidavit or Lease Agreement
	TOTAL	20	

THE END