



THE NATIONAL CREDIT REGULATOR

SEPTEMBER 2013

**TERMS OF REFERENCE FOR THE
APPOINTMENT OF A SERVICE PROVIDER TO
ASSIST THE NCR WITH SPACE PLANNING,
FURNITURE REMOVAL AND RELATED
SERVICES**

RFQ NUMBER: NCR 201/09/2013

DUE DATE: 25 OCTOBER 2013 @ 11H00

GENERAL TERMS OF CONDITIONS

1. General Information for Bidders

The National Credit Regulator (NCR) was established in terms of Section 12(1) of the National Credit Act (Act 34 of 2005) and came into being on 1 June 2006.

The NCR will determine which bidding organisation (“bid participant”), if any, is appointed in response to this request for submission of a Service provider to assist the NCR in the terms of reference in section two of this document.

General Terms

This tender is issued in terms of the Public Finance Management Act 1 of 1999 (PFMA), the Preferential Procurement Policy Framework Act 5 of 2000 (PPPFA), the Preferential Procurement Regulations, 2001 (PPR), Supply Chain Management Regulations issued by the National Treasury and BBBEE Act.

Parties that wish to submit proposals are required to indicate that they are willing to accept the General Conditions and Procedures of the NCR (see Section 1.5 below and Annexure B.1). Please read this document carefully prior to submitting your proposal.

1.1 The Proposal Format

- **Economy of proposal preparation**

The proposal should be prepared simply and economically, providing a straightforward and concise description of the bid participant’s ability to meet the requirements of the proposal request.

Clear factual responses are required. The content of the proposals shall determine the merit of each participant, not brochures or other marketing material. To facilitate the review of proposals, participants are required to organise their responses according to the format presented below. Should a participant wish to provide additional information, that information should be referred to, and provided for, in a file of Annexure.

- **Validity of proposals**

The proposals must include a statement as to the period for which the proposal remains valid. The proposal must be valid for at least ninety (90) days from the due date for the submission of all bids. Refer to the quarters in the terms of reference (TOR).

- **Number of proposals**

Each bid participant must provide **three(3) hard copies and a CD** of their entire proposal, including all the documentation referred to in 1.5 below, in the format specified in that section. All submitted proposals will become the property of the NCR, and will not be returned. Receipt of all proposals will be recorded in a register at the point of receipt. One copy of the proposal must be signed and dated in black ink by the bidder or authorized representative of the bidder and initialled on each page.

1.2 Submission of proposals

1.2.1 Proposals must reach the offices of the NCR before 11:00 on **25 OCTOBER 2013**, and must be enclosed in a sealed envelope which must have clearly inscribed on the outside:

(a) RFQ No: NCR 201/09/2013

**(b) TERMS OF REFERENCE : SERVICE PROVIDER TO ASSIST
THE NCR WITH SPACE PLANNING, FURNITURE REMOVAL
AND RELATED SERVICES**

(c) CLOSING DATE: 11H00, 25 OCTOBER 2013

1.2.2 Proposals are to be submitted in the marked tender box, in the reception area, National Credit Regulator, 127-15th Road, Randjiespark, Halfway House, Midrand. The tender box will **only** be available for the depositing of proposals between 08h00 and 16h30 on weekdays (excluding public holidays).

- 1.2.3 Please note that this RFP closes punctually at 11h00 on **25 OCTOBER 2013**. No late submissions will be considered under any circumstances.
- 1.2.4 **All** the documentation referred to in Section 1.4 below must be submitted. Failure to submit all the documentation referred to in this section may result in a submission being discarded, and not considered for evaluation.
- 1.2.5 If responses are not delivered as stipulated in this Section 1.3, such responses will be considered **“late”**, and will not be considered for evaluation.
- 1.2.6 The NCR shall not disclose any details pertaining to the responses received, to any other participant, as this is regarded as confidential information.
- 1.2.7 Envelopes must not contain documents relating to any RFP other than the one referred to in this RFP.
- 1.2.8 The responses to the RFP will be opened as soon as is practical after the expiry of the time advertised for receiving them.
- 1.2.9 Only the participants that are short-listed after the evaluation process will be informed of the results of the submission adjudication process.
- 1.2.10 After the evaluation process is completed, the Evaluation Committee may, prior to making a final selection, draw up a shortlist of participants and require them to make a detailed presentation to the Adjudication Committee. A minimum of 2 days’ notice will be given to relevant participants in advance of the presentation date.

1.3 Timetable

Date & time	Activity
04/10/2013	Issue Tender document
08/10/2013	Compulsory tender briefing & site inspection @ 14h00
25/10/2013	Closing date @ 11h00
28/10/2013	Evaluations

30/10/2013	Presentation by the bidder
04/11/2013	Adjudication Committee
06/11/2013	Appointment of a supplier
08/11/2013	Contract finalisation

The National Credit Regulator reserves the right to determine the structure of the process, the right to determine the number of short-listed participants, the right to withdraw from the proposal process, and the right to change this timetable at any time without notice.

1.4 Documentation to be submitted

Please Note

All of the documentation described below must be submitted, with no omissions whatsoever. Where a particular form or format of documentation is stipulated, this is the **only** form or format in which these documents must be submitted. Failure to adhere to these requirements may result in the rejection of the entire submission.

All of the documentation referred to below (in Parts One – Ten) must be submitted. For ease of reference and to facilitate the evaluation process, you are requested to clearly mark each part of the submitted documentation as it is referred to below.

Part One – Proposal drafted in response to Terms of Reference

Section 2 of this document below, contains the terms of reference (TOR) for the above mentioned tender. Bid participants are required to draft a proposal that will clearly indicate to the Evaluation Committee how they will fulfil the requirements as set out in the TOR.

Bid participants should include the following information when drafting their proposals:

- Proposals should make clear the relevant skills, experience and capacity of the participant, in respect of this particular TOR. This is an important evaluation criterion. Bid participants should ensure that their proposals focus

on how they will address the requirements of this TOR, rather than on achievements.

- Proposals must contain the details of the proposed approach to be adopted in order to deliver the service in accordance with the TOR.
- Proposals should clearly indicate whether or not bid participants have the internal capacity to meet the requirements of the TOR.

Part Two – Pricing Proposal

Please see Annexure A – SBD 3.1 (Pricing Schedule – Firm Prices). **DO NOT RETYPE THESE FORMS**. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected. Additional information may be added on a separate page if necessary.

The total price that the participant will charge to deliver services in accordance with the TOR must be clearly indicated. The pricing proposal should contain sufficient information to allow the Evaluation Committee to estimate the cost of the service, to a high degree of accuracy.

Please note that a financial proposal must be submitted in a **separate sealed envelope** together with your submission. The financial Proposal will be opened once all technical proposals have been evaluated. This appointment will be made in line with QBS.

All prices provided must be inclusive of Value-Added Tax (VAT).

Please note that the prices contained in the pricing proposal are the only charges that may be levied if the participant's proposal is successful, unless explicitly agreed to in writing by the National Credit Regulator, and in terms of the General Conditions of Contract.

Part Three – General Conditions and Procedures of the NCR

See Annexure B. Bid participants must indicate clearly that they have read this document, and have no objections to being bound by its contents. Where any provisions of the General Conditions and Procedures conflict with this General

Information for Bidders and/or Terms of Reference, the latter will take precedence over the General Conditions of Contract.

Part Four – Contract Form: Rendering of Services

See Annexure C - This will only be completed by the successful bidder once a selection has been made by NCR. Participants do not, therefore, need to complete this form at the bidding stage but their proposals must clearly indicate that they have read this form, and have no objections to signing it as is, if selected as the successful participant.

Part Five – Tax Clearance Certificate

See Annexure D - Please complete form SBD 2. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Failure to submit a valid, original tax clearance certificate issued by SARS will result in a proposal being rejected.

Please note that the Tax Clearance Certificate submitted must be valid for at least one month after the closing date of the tender.

Part Six – Preference Points Claim Form

See Annexure E – form SBD 6.1. Bid participants must complete Sections 8 and 9 in full. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

Part Seven – Declaration of Interest

See Annexure F – form SBD 4. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

Part Eight – Declaration of past Supply Chain Management Practices

See Annexure G – form **SBD 8. DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

Part Nine – Non-Disclosure Agreement

See Annexure H – Non-Disclosure Agreement. Participants must indicate clearly that they have read this agreement, and have no objections to signing it, as is.

Part Ten—Certificate of Independent Bid Determination

See Annexure I – Certificate of Independent Bid Determination Participants. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

Please note that a BBEE certificate must also be attached to the bid documents. None submission will result in zero scoring in this competitive bidding process

1.5 Evaluation Criteria

Proposals will be evaluated on the 80/20 preference points scoring system: that is, 80% of the points awarded will be based on price, as indicated in the table below; and 20% of the points awarded will be based on B-BBEE codes system, allocated as indicated in the table below.

B-BBEE status level of contributor	Number of points	Price
1	20	80
2	18	
3	16	
4	12	
5	8	
6	6	
7	4	
8	2	

Non-compliant contributor	0	
Total maximum points	20	80

Description

- Proposals should make clear the relevant **skills, experience and capacity** of the participant, in respect of this particular TOR
- Proposals must contain the details of the **proposed approach** to be adopted in order to deliver the service in accordance with the TOR
- Proposals should clearly indicate whether or not bid participants have the **internal capacity** to meet the requirements of the TOR

1.6 Conflict of interest

Service providers are required to provide services that are professional, objective and impartial. Service providers must ensure that there is no conflict of interest between existing assignments, obligations and responsibilities to other clients and the services set out in the TOR. In the event of any uncertainty in this regard, full disclosure in the submitted proposal should be considered. Non-disclosure of a conflict of interest may be grounds for termination of any contract.

1.7 Confidentiality agreement

The successful service provider may have access to confidential data or information. The appointment of a successful bidder is subject to that bidder agreeing to the contents of, and signing, the NCR's standard Non-Disclosure Agreement.

1.8 Contact details

This no-contact policy does not apply to any information deemed to be in the public domain, or which is readily available from organs of State, which are repositories of such information.

All communications and enquiries/requests for clarification relating to this proposal should be directed to procurement@ncr.org.za

NATIONAL CREDIT REGULATOR

TERMS OF REFERENCE FOR PROVISION OF SPACE PLANNING AND RELATED PROFESSIONAL SERVICES

1. PURPOSE

The purpose of this term of reference is to request suitable service providers to submit a proposal to assist the NCR with space planning and related professional services for a period of **one month**. The NCR wishes to enter into an agreement with a space planning and management agency that would provide plans and manage contractors for any reconstruction and design needs of the National Credit Regulator (NCR).

For the purpose of this proposal, management and project team skills and capabilities must be highlighted, as well as their track record in space planning with detailed client references.

2. SCOPE OF WORK

The services required may include, but is not limited to the following:

2.1 Space Planning

- Planning of space as per the NCR standards in the allocated 1135m2 building size
- The building should make provision for a minimum of 6 departments with the following office requirements. All users who are not allocated to offices will be seated in an open plan area.

Department • C	Number of employees	Manager Office	Supervisor Office
Department 1	11	3	3
Department 2	10	1	0
Department 3	18	1	3
Department 4	7	1	1
Department 5	12	2	0
Department 6	8	0	1
Total	66	7	8

space for an eating area/pause area to accommodate

20 employees at any given time

- Measuring and drawing plans of the building concerned.
- In liaison with the NCR Security and Facilities meet with Heads of Departments to obtain specific requirements on number of employees, work flow etc and compilation of a comprehensive brief in this regard.
- Ensure all available space is utilized optimally taking best practices into account.
- Preparation of all space plans.
- Ensure that the space planning and refurbishment designs are in line with energy saving and green building principles.

2.2 Interior Design

- Specialized lighting
- Audit of all existing items of furniture to be moved to the satellite office.

2.3 Project and Construction Management

- Provision of specifications, drawings and finishes specifications including furniture, electrical, ceiling, air conditioning, fire and sprinklers and lighting layout drawings. Submission of drawings to council.
- Move management.
- Preparation of work program and schedule.
- Installation.
- Monitoring of contractor's progress in relation to the project.
- Quality control of work whilst under construction.
- Snagging of completed work.

2.4 Other Professional Services

- Sub-contract and manage any professional services required or any refurbishment needs, e.g.
 - Quantity Surveyor
 - Architect
 - Mechanical
 - Electrical

2.5 Removal of furniture

The successful service provider must provide a professional office removal all inclusive solution from Midrand to the satellite office within a radius of approximately 2.3 kilometres from the existing premises. This includes a proposal encompassing the project plan for office furniture and IT [Computer Hardware] equipment. This shall include but not be limited to:

- NCR will arrange an appointment for the viewing of all goods to be moved.
- The service provider should only employ permanent trained staff.

- All vehicles to be fitted with tracking devices.
- All vehicles to have Air Suspension
- All P.C.'s and printers to be transported in Cages.
- A full time Project Manager to be on the job during the relocation.
- The service provider must attend all Removal Planning Meetings
- The service provider must be able to: remove safes, dismantle, move and re-assemble desks, shelving and bulk filing systems, special wrapping of all furniture, pictures, P.C's and printers.
- The service provider MUST protect both buildings prior to the move.
- The service provider must provide returnable packaging boxes for documents packing
- Dismantle at the NCR main building and assemble at the satellite office all office furniture including bulk filing systems
- Physical handling / removal of all office furniture and packed boxes from the old offices; and unpacking / moving of all office furniture and boxes to the new offices
- The anticipated date for the move is 15 December 2013.
- The service provider shall remain at the satellite office, to provide for any office furniture adjustments or changes.
- The duties will be limited to four [4] competent office administration assistant personnel
- The service provider must provide adequate personnel to physically pack away documents in filing rooms. This is over and above normal removal of packed boxes from NCR staff.
- Unpacking active files, books, compact boxes and dust covers. Pack all files, books, dust covers and compact boxes inside the cleaned shelves
- Remove and pack all lever arch files and books at the filing rooms inside own boxes and label with marking pen.
- Render other filing related support as per instructions coordinated by Departmental Managers.

3. CONDUCT OF WORK

The successful space planning service provider should provide project management fees for the space planning project and for managing sub-contractors at the NCR. The requirements include optimum space utilization and monitoring of overheads v/s productivity. The service provider is to provide the project plan for the NCR's acceptance and approval.

4. EVALUATION CRITERIA

Evaluation Criteria	Weighting:
Experience, Skills and Ability of Service Provider <ul style="list-style-type: none">• Bidders 'track record• Knowledge and Expertise in services of similar nature• Ability of the bidder to fulfill the NCR 's requirements	20
Human resources <ul style="list-style-type: none">• Proposals should clearly indicate whether or not bid participants have the internal capacity to meet the requirements of the TOR• Project team member experience(accompanied by brief CV's)	25

<ul style="list-style-type: none"> • Availability of professional and other resources • Bidders to indicate whether the proposed staff members are permanent or temporary staff or subcontractors 	
<p>Understanding the scope of the project.</p> <ul style="list-style-type: none"> • Project Management Solution Proposed in relation <ul style="list-style-type: none"> ○ Furniture removal ○ IT equipments removal ○ Transportation vehicles ○ Space planning ○ Review of space requirements documents • Does the project plan cater for risk management associated with this project and mitigation strategy? 	30
<p>Green Building Principles</p> <ul style="list-style-type: none"> • Understanding of green building principles • The bidder must indicate how the space planning and refurbishment designs will be in line with energy saving and green building principles. 	15
<p>References</p> <p>The bidder must provide three contactable reference where similar has been done(name and tel numbers)</p>	10
<p>Total</p>	100

Bidders are required to score a minimum score of **80 points** in order to be evaluated in the next level, which are bidder presentation and the BBBEE and price. Bidder who fails to reach the minimum score will be disqualified for further evaluation.

Price and BBBEE will be calculated out of 80/20 Preferential points

Price	80 points
BBBEE	20 points

5. Additional information to be submitted by the service provider:

- Brief company profile, as relevant to the above mentioned terms of reference.
- Experience in the relevant areas.
- Clientele.
- Certification of all team members, highlighting experience relevant to this exercise. Confirmation that the proposed team members will in fact be available to undertake this exercise at the appropriate time and meet the necessary deadlines.
- Contact details of at least three references from amongst recent clients with whom similar work has been conducted in the past 12 Months.
- Certificate of incorporation / legal status.
- Financial proposal.
- BBBEE certificate

6. Annexure A: Pricing Schedule

DESCRIPTION OF SERVICE	UNIT	PRICE INCLUDING VAT
Space Planning <ul style="list-style-type: none"> • Research process • Space planning process 	Per person Per person	----- -----
Interior design <ul style="list-style-type: none"> • Technical detail process 	Per m2	----- -----
Project Management <ul style="list-style-type: none"> • Project Management fee 	In %	-----
Disbursements <ul style="list-style-type: none"> • A0 plans colour • A1 plans colour • A3 plans colour 	Per print Per print Per print	----- ----- -----
Professional services as and when required <ul style="list-style-type: none"> • Quantity Surveyor • Architect • Mechanical • Electrical 	Per hour Per hour Per hour Per hour	----- ----- ----- -----
Move Management/Furniture removal <ul style="list-style-type: none"> • Packaging • Labeling • Dismantling and assembly 	Per hour Per hour Per hour	----- ----- -----
Travelling <ul style="list-style-type: none"> • Travelling cost 	Per kilometer	-----

