

TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A WORK STUDY INVESTIGATION TO ASSESS THE CURRENT SITUATION AND WORK LOAD AMONGST OTHER ASPECTS AT UMALUSI.

1. BACKGROUND

The main objective of conducting the work study investigation is to determine root cause of the workload amongst other things at Umalusi.

2. SCOPE OF WORK:

The scope of work will focus on the following:

- Analysing the existing performance agreement and job descriptions of employees at Umalusi.
- Interviewing all the employees at Umalusi.
- Conducting method (time and motion) study which will focus on the systematic recording and critical examination of existing and proposed ways of performing duties at Umalusi effectively and efficiently.
- Conducting work measurement to establish the turnaround times for all roles to carry out a specific job at a defined level of performance.
- Identifying whether there is a need for any additional posts or re-design of jobs (responsibilities) required to efficiently achieve the work requirements of the employees.
- Assess the current structure of Umalusi to determine whether is capable of supporting the mandate strategically and operationally, currently as well as in the long term.
- Conducting skills audit to identify the skills gap within Umalusi.
- Conduct job evaluation as a second phase

3. NUMBER OF POSITION

There are 140 positions at Umalusi. The breakdown of the positions is as follows:-

Posts
CEO
Executive Manager
Senior Managers
Managers
Assistant Managers
Practitioners
Senior Administrators
PAs
Administrative Assistants
General Workers

4. REQUIREMENTS

The appointed Service Provider must have extensive experience in the public sector serving clients and sound track record in method study, work measurement and job design.

5. DELIVERABLES AND MILESTONES

The final report must be presented to the Senior Management Leadership Committee of UMALUSI.

6. TIMELINES

The work-study investigation exercise for the entire organisation must be finalised in three months from the appointment date.

7. CONTRACTUAL ARRANGEMENTS

- The contract will be drawn up between the Umalusi and the appointed Service Provider.
- Invoices will be paid on completion of deliverables in accordance with the contract.
- Invoices must be accompanied by reports

8. PRE-QUALIFICATION: QUALIFYING CRITERIA

The following Pre-Qualifying Criteria will be applied in the initial stage of the evaluation. **Bidders who do not meet the Pre-Qualifying Criteria may not be considered for the next stage of evaluation.**

Bidders are required to complete the table below by indicating whether they comply with the requirement by marking the appropriate column with an 'X' on the table below. Bidders are required to corroborate each requirement, where applicable.

Requirements	Non-Compliant	Compliant	Comment or reference to section in the bid Document
1. Attendance of compulsory Information Session.			
2. A valid SARS Tax Status Certificate / SARS tax pin.			
3. Central Supplier Database proof of registration.			

Requirements	Non-Compliant	Compliant	Comment or reference to section in the bid Document
4. Companies and Intellectual Property Commission, Company Registration.			
5. Bidder has submitted all returnable documentation to Umalusi (Annexures and SBD forms) (SBD1; SBD 2; SBD 3.1 or 3.2; SBD 4; SBD 6.1; SBD 8 & SBD 9)			
6. Company profile(s) indicating expertise of key personnel			
7. General Conditions of Contract – signed or Initialled on all pages			

9. FUNCTIONAL EVALUATION

- The evaluation criteria for functionality aim to assess the bidder's capability, reliability and ability to execute and maintain a bid and/ or contract. The minimum number of points that bidders' have to obtain in order to progress to the next stage of evaluation is 70.
- NB: Bids that scored less than 70 on functionality will be disqualified and will not progress to the next stage of evaluation

Functional Criteria	Scoring	Sectional Scoring/ Weighting	Total %
Technical specifications			100

Functional Criteria	Scoring	Sectional Scoring/ Weighting	Total %
<p>1. Methodology of implementing the project</p> <p>The bidder must propose a project plan which will detail the activities, schedules, cost and procurement plan of executing the project (reference to the specification document and the requirement to conform to all the specifications)</p>	<ul style="list-style-type: none"> • A detailed execution plan supplied = 30 points • A detailed execution plan not supplied = 0 points 	30	
<p>2 References</p> <p>A proven track record substantiated by reference to entities for where work study services/job evaluation have been provided. This shall include the following information for each project undertaken:</p> <p>a) Entity name;</p> <p>b) Contact name and telephone number;</p> <p>c) Date when service was rendered;</p> <p>d) Description of service;</p> <p>e) Duration of project; and</p> <p>f) Contract price.</p> <p>Reference Letters must be submitted on a letterhead of the client and</p>	<p>Five contactable references = 40 points</p> <p>Four contactable references = 30 points</p> <p>Three contactable references = 20 points</p> <p>Two contactable references = 10</p> <p>One contactable reference = 5</p> <p>No contactable reference = 0</p>	40	

Functional Criteria	Scoring	Sectional Scoring/ Weighting	Total %
<p>3 Experience of proposed key personnel</p> <p>a) Team leader- Post graduate degree in Human Resource Management/ Industrial psychology; Organizational Development + 10 years or more experience in similar environment 15 Points</p> <p>b) Professional associates- Degree in Human Resource Management/ Industrial psychology; Organizational Development + 3 years or more in similar environment 15 points</p>	<ul style="list-style-type: none"> • Team leader- Post graduate degree in Human Resource Management/ Industrial psychology; Organizational Development + 10 years or more experience in similar environment= 15 Points • Professional associates- Degree in Human Resource Management/ Industrial psychology; Organizational Development + 3 years or more in similar environment =15 points 	30	
Minimum points		70	
Total Points		100	

The evaluation criteria for functionality aims to assess the bidder's capability, reliability and ability to execute and maintain a contract. The minimum number of points that suppliers have to obtain in order to progress to the next stage of evaluation is **70**.

To enable Umalusi to score the functionality, kindly complete the below table and attach proof where applicable.

Description	Action required	Comments/reference to section in the submission
Methodology of implementing the project.	Please attach proposal	
References	Provide list of contactable references. Reference Letters must be submitted on a letterhead of the entities	
Qualification and experience of key proposed key personnel	Attach CV's and qualifications	

10. PRESENTATIONS

Bidders that met the requirements of the previous stages will be evaluated further with a presentation that they will be required to provide at Umalusi's offices. The threshold for this will be 80 points and bidders will be provided with the scoring criteria at this point.

11. PRICE AND PREFERENTIAL POINTS EVALUATION

- Subsequent to the evaluation of Pre-Qualifying Criteria, Mandatory criteria and functional criteria, Points will be allocated to Bidders at this stage of the evaluation in accordance with PPPFA Regulations, as follows:

Price points

80

Preferential procurement points **20**

Price points

The following formula will be used to calculate the points for price:

$$P_s = 80(1 - (P_t - P_{min}) / P_{min})$$

Where:

P_s = Points scored for comparative price of Bid or offer under consideration;

P_t = Comparative price of Bid or offer under consideration; and

P_{min} = Comparative price of lowest acceptable Bid or offer

Preferential procurement points

A maximum of 20 points may be awarded in respect of preferential procurement, which points must be awarded to a bidder for attaining their B-BBEE Status Level in accordance with the table below:

B-BBEE Status Level	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

An unincorporated trust, consortium or Sub-contractors will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate Bid.

12. PRICING SCHEDULE

Services	Quotation price(VAT inclusive)
Work study for 140 positions	
Report	
Other	
Total	

- Bidders are required to indicate price per each service inclusive of all applicable taxes for the legal services
- Bidders are required to indicate if prices are fixed or not, if not firm for the full period, provide details of the basis on which adjustments will be applied for e.g. consumer price index

13. SUBMISSION OF PROPOSAL

Proposals should be submitted by means of hard copies to be delivered at Umalusi, on or before **28 June 2019 at 12:00**

No briefing session

37 General Van Ryneveld Street

Persequor Techno Park

Pretoria

0020

For enquiries, please contact: Tenders@umalusi.org.za



Council for Quality Assurance in
General and Further Education and Training