



# BeyondZero

a partner in public health transformation

## TERMS OF REFERENCE

### Request for Proposal for Implementation of Grants Management System in a period of three (3) months.

SUMMARY	
Title	<b>Request for Proposal for Implementation of Grants Management System in a period of three (3) months.</b>
Reference	<b>BZ/GF_GMS/019-2022</b>
Description <i>(Summary for website - 100 words max)</i>	Beyond Zero seeks the services of a Service Provider to implement a Grants Management System that will cater for its Small Grants Programme.
Questions by email only to	<a href="mailto:procurement@beyondzero.org.za">procurement@beyondzero.org.za</a>
Submission by email only to	<a href="mailto:procurement@beyondzero.org.za">procurement@beyondzero.org.za</a>
Submission must include	<ol style="list-style-type: none"><li>1. Entity registration documents, listing Directors</li><li>2. Certified ID Copies of the Directors</li><li>3. Confirmation of banking details</li><li>4. B-BBEE Rating Certificate issued by a SANAS Accredited B-BBEE verification agency, or Affidavit if applicable</li><li>5. Valid SARS Tax Clearance Certificate / PIN</li><li>6. Valid SARS VAT Notice of Registration (If VAT registered)</li><li>7. Signed Code of Conduct</li><li>8. Completed and Signed bid document</li><li>9. Signed Declaration of Interest</li><li>10. Approach and methodology</li><li>11. Reference letters</li><li>12. Functional requirements</li><li>13. Non-functional requirements</li><li>14. Completed pricing schedule</li></ol>
<b>Deadline for submission</b>	<b>05 October 2022, @13h00pm</b>

## **1. PURPOSE**

- 1.1 Beyond Zero (BZ) seeks to appoint an experienced service provider to supply and implement a Grants Management System. The aim of the system is to improve efficiencies and productivity of Beyond Zero in delivering its mandate.

## **2. BACKGROUND**

- 2.1 Beyond Zero is one of the organisations leading the fight against the scourge of HIV in South Africa. Beyond Zero is one of four Principal Recipients (PRs) in South Africa selected by the Global Fund for AIDS, TB, and Malaria (GFATM) to lead and provide strategic management, oversight, monitoring, and evaluation on the implementation of GF grants since April 2019. Beyond Zero is implementing interventions that address the Acquired Immune Deficiency Syndrome (AIDS) and Tuberculosis epidemics in South Africa and focuses more specifically on the following modules:

- Prevention programs for adolescents and youth, in and out of school (AYP);
- Comprehensive prevention programs for Men who have sex with other Men (MSM);
- Comprehensive prevention programs for Transgender (TG) people;
- Human Rights and
- Community systems strengthening (CSS).

- 2.2 Beyond Zero works with communities, provincial governments, civil society organisations, AIDS Councils, health facilities, media, and academic institutions to improve health systems and health outcomes of people in the communities we serve. Its work focuses on strengthening health and community service delivery systems at all levels of health care.

- 2.3 Beyond Zero nurture public health service delivery excellence through our pioneering work in strengthening health systems through direct and indirect delivery of services.

- 2.4 Beyond Zero work in partnership with the communities that we support and collaborate with key stakeholders to deliver innovate, high quality public health solutions which address challenges faced by communities whilst ensuring sustainability.

- 2.5 Beyond Zero cultivates excellence in public health service delivery by:

- Leading the way to zero new HIV infections – one patient, one clinic, and one community at a time.

- Pioneering sustainable solutions through mentoring, technical assistance, training and research
- Transforming the way NGOs do business by driving an adaptive and flexible response to evolving needs
- Harnessing the power of partnerships to leave the system better than we found it
- Celebrating the value of human life in everything we do

### **3. OBJECTIVE**

- 3.1 The objective of this bid is to appoint an experienced and capable service provider to implement the CSS module which caters for the issuance of grants to civil society organisations (CSOs) and network organisations that represent key and vulnerable populations (KVPs).
- 3.2 Beyond Zero will be embarking on a competitive process to select recipients of small grants, disburse funds and manage the reporting requirements throughout the process.

### **4. SCOPE OF WORK**

- 4.1 The service provider shall be expected to deliver and implement the required tool in a period of three (3) month.
- 4.2 The service provider is expected to implement a grants management system that have the following functions:
  - i. Allow applicants to apply for grants online including uploading of supporting and statutory documents.
  - ii. Screening of applicants based on a predefined criterion, prior to completion of application.
  - iii. Transparent review of applications and scoring based on a defined evaluation criteria.
  - iv. Automated decision making and record of funding approval.
  - v. Seamless contracting and signing of grant agreements.
  - vi. The creation of users with appropriate security and permissions, and full audit trail of their activities.
  - vii. Applicants should be able to track the status of their application.
  - viii. Reporting functionality for grant recipients reports – narrative and financial.
  - ix. Automated feedback on submissions and reminders for outstanding tasks.
  - x. Allow for the generation of specific reports.

- xi. Close out procedures for completed grants.
- xii. Archiving capability.

- 4.3 The service provider shall be expected to provide training to Beyond Zero super user.
- 4.4 The service provider will be required to provide the Beyond Zero with support and maintenance post implementation of the Solution. Remote support can be used, but onsite support must be provided for urgent requests or requests that cannot be resolved within agreed timeframes remotely. The maintenance and support will be required for a period of twelve (12) months.

## 5. BID RESPONSE REQUIREMENTS

- 5.1 Beyond Zero will use a pre-determined evaluation criterion when considering received Proposals. The evaluation criteria will consider the commitment made for Mandatory, Technical, Presentation/Demonstration and Price and B-BBEE. During the evaluation of received Proposals Beyond Zero will make an assessment whether all of the Proposals comply with set minimum requirements. Bidders which fail to meet minimum requirements, thresholds or have not submitted required mandatory documents will be disqualified from the bid process.
- 5.2 The requirements at any given stage must be complied with prior to progression to the next stage. Beyond Zero reserves the right to disqualify bidders without requesting any outstanding document/information.
- 5.3 Bidders which meet the requirements of the TORs, commercial and the contractual conditions are invited to submit proposals. If the Consultancy finds any ambiguity, omission or internal contradictory, or any feature that is unclear or that appears restrictive, they should seek clarification before the closing date of submission.
- 5.4 As a minimum requirement the service provider must submit written relevant contactable reference (contact name, position, contact number and email address) whereby they have executed similar services. The reference letter must be in the client's company letterhead and must not be older than five (5) years.
- 5.5 Bidders must provide a detailed proposal of the methodology/ approach to be used to carry out the scope of work. Bidders should indicate their knowledge of the demonstration of how the bidder will deliver this project in line with the scope of work, include a detailed project plan with specific timeframes, deliverables and reporting. The project implementation must not be longer than three (3) months.
- 5.6 Bidders must complete functionality and non-functionality requirements provided on **Annexure M** as part of technical evaluation.

- 5.7 Beyond Zero will request presentations/demonstrations of the proposed system from the shortlisted bidders as part of the bid evaluation process.
- 5.8 Once the proposals are received and opened, bidders shall not be required nor permitted to change the substance, the key staff and so forth.

**6. EVALUATION CRITERIA**

The evaluation of proposals will be managed by an Evaluation Committee which will prepare a shortlist of applicants that meet the eligibility for appointment. The evaluation process will be conducted according to the following stages:

- **Stage 1:** Assessment of administrative compliance. Applications that do not comply will not be evaluated further.
- **Stage 2:** Assessment on technical evaluation criteria competency focusing on the ability to fulfil the required scope of work. Service providers need to achieve a score of at least 70 out of 100 points to progress further.
- **Stage 3:** Practical assessment on the proposed solution. Service providers need to achieve a score of at least 70 out of 100 points to progress further.
- **Stage 4:** The final stage of evaluation will be the application of the preference points system price at 80 points and B-BBEE 20 points.

**6.1 Stage 1: Eligibility Evaluation**

**Table 1: Eligibility Evaluation Stages**

<b>Criteria</b>	<b>Sub-Criteria</b>	<b>Comply / Not Comply</b>
Eligibility	SARS Tax Clearance Status/pin	
	Certified ID Copies of the Directors	
	CIPC Registration Documents	
	In bids where consortia / joint ventures / sub-contractors are involved; each party must submit a separate proof of TCS / PIN	
	Valid BBB-EE Certificate (from SANAS Accredited Verification Agency)	
	VAT Registration Certificate or VAT Registration Letter (“VALUE ADDED TAX Notice of Registration”) available on e-Filing for all expenditure more than R500000	
	Signed Global Fund Code of Conduct for Suppliers of Services	
	Completed and signed Declaration of Interest	

## 6.2 Stage 2: Technical evaluation criteria

Only service providers who score **70 points** or more in stage 2 will be evaluated further in stage 3 for practical assessment.

Criteria	Description	Weighting
<p><b>Methodology &amp; Approach</b></p>	<p>The service provider must provide a detailed proposal of the methodology/ approach to be used to carry out the scope of work.</p> <p>The service provider must indicate their knowledge of the demonstration of how the bidder will deliver this project in line with the scope of work, include a detailed implementation plan, detailed project plan/timelines, deliverables, training process for super users, maintenance and support, reporting, etc. The project duration must not be longer than three (3) months</p> <p><b>Excellent:</b> Satisfies the requirements The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full = <b>25 points</b></p> <p><b>Acceptable:</b> Satisfies the requirement. The response shows an acceptable level of understanding of the requirement and provides some satisfactory level of details on how the requirements will be fulfilled = <b>15 points</b></p> <p><b>Serious Reservations:</b> Satisfies the requirement with serious reservations. The response addresses some elements of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be fulfilled = <b>10 points</b></p> <p><b>Unacceptable:</b> Does not meet the requirement. Does not comply and/or insufficient information provided = <b>0 points</b></p>	<p>25</p>
<p><b>Reference Letters</b></p>	<p>The service provider must provide written contactable reference letters of recent and current projects.</p> <p>Reference must not be older than five (5) years, and the written reference must be submitted on the letterhead of the previously serviced clients and should at least reflect name</p>	<p>20</p>

<b>Criteria</b>	<b>Description</b>	<b>Weighting</b>
	<p>of the clients, title of the related work conducted, contactable reference name and contact number and signed by the appropriate delegate.</p> <p><b>Scoring Matrix</b></p> <p>Three (3) or more contactable references provided = <b>20 points</b></p> <p>Two (2) contactable references provided = <b>15 points</b></p> <p>One (1) written reference letter provided = <b>10 points</b></p> <p>No reference letter provided = <b>0 points</b></p>	
<b>Functional Requirements</b>	The service provider must complete sheet 2 (Functionality Requirements) of <b>Annexure M</b> provided in excel.	30
<b>Non Functional Requirements</b>	The service provider must complete sheet 3 (Non-Functionality Requirements) of <b>Annexure M</b> provided in excel.	25

### 6.3 Stage 3: Practical Assessment Evaluation

Only bidders that have scored 70 points and above in the technical evaluation stage will be evaluated on stage 3 for practical assessment.

<b>Requirement</b>	<b>Description</b>	<b>Weighting</b>
Description	<p>Only short-listed bidders will be invited to do a demonstration.</p> <p>The demonstration will be mainly based on functional requirements.</p>	100
Minimum score which bidders must achieve for Stage 3 to move on to Stage 4 Price and B-BBEE evaluation.		70 points

### 6.4 Stage 4: Price and B-BBEE evaluation

Service Providers that have successfully scored 70 points and above in the practical assessment evaluation stage will be evaluation on stage 4 (Price and B-BBEE). It is recognised that it is difficult for a prospective service provider to be firm about the extent of the work based

solely on the terms of reference. However, to assist with assessments, a service provider will be provided with scenarios in the pricing schedule for evaluation purposes whilst a rate card will be provided and must be completed to be used during delivery of the services.

NB: Service Providers should note that the scenarios provided below are for the purposes of evaluation of the tender and a rate card unit price will be used during execution of the services. The service providers' tender response will be evaluated based on a combination of price and BBEE in accordance with the ratios set out below:

<b>Price and B-BBEE</b>	<b>Weighting</b>
Price	80
B-BBEE	20
Total	100

**Price evaluations will be conducted using the following formula:**

$$\text{Lowest bid price} = 80$$

$$\text{Price under calculation} = 80 \left( 1 - \frac{\text{Price under consideration} - \text{Lowest bid price}}{\text{Lowest bid price}} \right)$$

**BBEE evaluations will be conducted in accordance with the following table:**

<b>B-BBEE Status</b>	<b>Number of Points (80/20 system)</b>
Level 1	20
Level 2	18
Level 3	12
Level 4	10
Level 5	8
Level 6	6
Level 7	4
Level 8	1
Non-compliant	0

## PRICING SCHEDULE

Service provider to fill in the following table

Table 4: Pricing Schedule

Description	Qty	Unit Price (VAT Excl.)	Total Cost
Implementation Services	Once off	R	R
Licensing	1 year	R	R
Maintenance and Support	1 year	R	R
Training	1 person	R	R
<b>Total (VAT Excl.)</b>			<b>R</b>
<b>VAT @15%</b>			<b>R</b>
<b>Total (VAT Incl.)</b>			<b>R</b>

### Pricing Schedule Note:

- i. Price should be VAT Inclusive.
- ii. Rand amount should be rounded off to two (2) decimal points.
- iii. Service providers are required to price on all items.

**NB.** Error/s made must be scratched and signed next to the error by the same person who signs the bid document. Therefore, no tipex allowed. In addition, error/s made and relating to price must be accompanied by a letter [in the service provider's letterhead] pointing out the error made and acknowledging that it is the delegated signatory and was signed by the service provider for reasons of correcting the error.

In the event that the service provider fails to complete fully this form of price schedule or to provide the information requested, or to sign the bid at the appropriate spaces provided or next to errors, the bid will be rejected as none responsive.