

## TERMS OF REFERENCE

SUMMARY	
Title	Appointment of a suitable and qualified service providers to provide technical support through mentoring and coaching for Civil Society Organisation (CSO) for period of eighteen (18) months starting in September 2023 to March 2025.
Reference	<b>BZ -GF-2023-07-04</b>
Description (Summary for website - 100 words max)	Beyond Zero (BZ) seeks to appoint South African legally registered company or companies per district to provide technical support through mentoring and coaching support in the two broad areas of Organisational Development (OD) and HIV Technical Skills strengthening.
Submission by email only to	<a href="mailto:crs-procurement@beyondzero.org.za">crs-procurement@beyondzero.org.za</a>
Submission must include	<ol style="list-style-type: none"> <li>1. CIPC Registration Document</li> <li>2. SARS Tax clearance Certificate/Tax Compliance Status Letter</li> <li>3. VAT Registration Certificate or VAT Registration Letter ("VALUE ADDED TAX Notice of Registration") available on e-Filing for all expenditure more than R50 000</li> <li>4. B-BBEE certificate (<b><i>Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor/Valid Sworn Affidavit together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.</i></b>)</li> <li>5. Signed Global Fund Code of Conduct for Suppliers of Services</li> <li>6. Completed and Signed Declaration of Interest</li> <li>7. Pricing Proposal</li> </ol>
Closing date and time	<b>15 August @15h00pm</b>

## 1. PURPOSE

- 2.1 Beyond Zero (BZ) seeks to appoint Service Providers (SP) to provide mentoring and coaching for 164 Civil Society Organizations (CSO's) in Eastern Cape, Limpopo and Free State provinces over a period of 18 months.
- 2.1 The overall purpose of the required services is to mentor and coach on sustainable organizational capacity for 164 CSOs by assisting CSOs to mitigate organizational capacity gaps outlined in the capacity development plans which will be provided by BZ.
- 2.1 Mentoring and coaching support will be in the two broad areas of Organisational Development (OD) and HIV Technical Skills strengthening. This will include;
- Support CSOs to mitigate gaps indicated in the capacity building plans
  - Ensuring all CSOs have the relevant OD and management documents in place and are utilizing them effectively as indicated in the Capacity Assessment Tool (CAT).
  - Review existing documents and tools and align with knowledge and skills gained through trainings.
  - Support CSOs to develop any missing documents and tools

## 2. BACKGROUND INFORMATION

- 2.1 BZ is one (1) of four (4) Primary Recipient of funding support by the Global Fund for AIDS, TB, and Malaria in South Africa to lead and provide strategic management, oversight, monitoring, and evaluation of the day-to-day implementation of the Global Fund grant for the period April 2022 until March 2025. Beyond Zero is implementing interventions that address the AIDS and TB epidemics in South Africa and focuses more specifically on the Prevention Programs for Adolescent and Young People (AYP), in and out of school; Comprehensive prevention programs for Men who have sex with other Men (MSM); Comprehensive prevention programs for Transgender (TG) people, and Community Systems Strengthening (CSS) programmes.
- 2.1.1 The CSS Programme provides an opportunity for Civil Society Organizations (CSO) to benefit from capacity building and mentorship. CSOs contribute to achieving development goals through advocacy, social mobilisation, and provision of health services. They play a critical role in providing prevention, treatment, care, and support services particularly to key, vulnerable and hard to reach populations. CSO programme is a key component of Global Fund grants; however, CSOs face technical and governance capacity challenges in grant utilisation leading to missed opportunities for improving health at community level. Capacity

Building, which includes, Training, Coaching and ongoing Mentoring support is a key component of this grant.

- 2.1.2 To this effect, Beyond Zero provides capacity building support to CSOs that are led or work closely with people with TB, People Living with HIV (PLHIV), key populations sex workers, MSM, PWID, and TG as well as vulnerable groups Adolescent and Young People (AYP), with the objective to build their capacity to manage, implement, report, monitor and evaluate quality combination prevention and linkage to care for HIV and TB programs, including support to increase their resource mobilization capacity as part of the CSS Programme.

### 3. OVERVIEW OF REQUIREMENTS

- 3.1 To fulfil this role entrusted as part of the CSS programme, Beyond Zero requires a suitable and experienced service providers to undertake mentoring and coaching of 164 identified CSOs located and operating in the districts outlined in the table below, in the Eastern Cape, Free State and Limpopo Provinces (*estimated 12 per district*);

PROVINCE	DISTRICT
Eastern Cape Province	<ul style="list-style-type: none"> <li>• Alfred Nzo</li> <li>• OR Tambo</li> <li>• Buffalo City Municipality</li> <li>• Nelson Mandela Bay</li> <li>• Amathole</li> </ul>
Limpopo Province	<ul style="list-style-type: none"> <li>• Capricorn</li> <li>• Sekhukhune</li> <li>• Mopani</li> <li>• Waterberg</li> <li>• Vhembe</li> </ul>
Free State Province	<ul style="list-style-type: none"> <li>• Thabo- Mofutsanyana</li> <li>• Mangaung</li> <li>• Lejweleputswa</li> </ul>

**Table 1: Districts where mentoring will be conducted.**

- 3.2 After embarking on training, Beyond Zero is expected to conduct mentoring based on capacity assessment outcomes and capacity development plans of all CSOs, to address their capacity gaps and needs outlined in the capacity building plans for each CSO.
- 3.3 The mentoring and coaching will be monitored through organisational capacity building assessments at Baseline, Midterm and End Term Assessment stages to ensure that the gaps are mitigated, and interventions offered are efficacious.

3.4 To perform the mentoring and coaching activity an implementation plan will be developed by the service provider allocating **7 days (8hours per day)** per individual organisation (for the duration of the grant and not consecutive days necessarily). Mentoring will be provided in the domains listed below:

- a) Governance, Leadership and Strategy;
- b) Human Resources Management;
- c) Financial Management;
- d) Administrative Capacity;
- e) Community Linkages and Networks;
- f) Sustainability;
- g) Monitoring, Evaluation, Learning and Reporting (MELR);
- h) Communication and Marketing;
- i) Health Products and Services; and
- j) Programme Capacity.

3.5 The CAT scores organizations according to their level of functioning;

- Stage 1 -Developing
- Stage 2 - Maturing
- Stage 3 - well-functioning

The CAT provides guidelines and evidence needed from organizations to progress from one (1) level to another. The results of the capacity assessments are used to inform programme decisions on capacity building needs. The mentoring should therefore aim to improve the score of the CSO over a period of time.

## **4. OBJECTIVES**

4.1 The objective of mentoring and coaching of CSOs are based on the findings of the Organisational Capacity Assessment as follows:

- a) Assess and evaluate whether the CSOs have been engaged in capacity development processes and identify the methodologies used and lessons learned budget and human resource allocated and results obtained.
- b) Evaluate the current readiness, level of awareness and development of the CSOs for implementing recommended capacity development plans on identified priorities.
- c) Recommend amendments to the capacity development plan, which is easy to turn into action, including comprehensive programmes for training, coaching, and mentoring.

- d) Support CSOs to mitigate gaps indicated in the capacity building plans
- e) Ensuring that all CSOs have the relevant OD and management documents in place as indicated in the CAT.
- f) Review existing documents and tools and align with knowledge and skills gained through trainings.
- g) Support CSOs to develop any missing documents and tools.
- h) Support and prepare CSOs to effectively use and implement documents and tools as well as address gaps identified and listed in the capacity building plan.

## 5. SCOPE OF WORK

5.1 The successful service provider shall be expected to:

5.1.1 Focus on the areas and provide appropriate mentoring and coaching support as listed in the table below. Specific deliverables as illustrated in the table will be expected as an output for support provided under each domain.

Area for Capacity Strengthening (Domains)	Aspects to Focus on	Deliverables
<b>Governance and Leadership</b>	<ul style="list-style-type: none"> <li>• Annual reports to DSD within 12 months' period</li> <li>• VAT Registration</li> <li>• Income tax registration</li> <li>• BBBEE Certificate</li> <li>• Strategic plan</li> <li>• Code of good governance</li> <li>• Code of conduct for board members</li> <li>• Board profile</li> <li>• Roles and responsibilities of board</li> <li>• Risk management plan</li> </ul>	<ul style="list-style-type: none"> <li>• All mentored CSOs to have the following documents on file;</li> <li>• Strategic plan</li> <li>• Code of good governance</li> <li>• Code of conduct for board members</li> <li>• Board profile</li> <li>• Roles and responsibilities of board</li> <li>• Risk management plan</li> </ul> <p><b>Provide evidence of support to CSOs to acquire following documents detailing when process is anticipated to be completed</b></p>

		<ul style="list-style-type: none"> <li>- Annual reports to DSD within 12 months' period</li> <li>- VAT Registration</li> <li>- Income tax registration</li> <li>- BBBEE Certificate</li> </ul>
<b>Human Resources</b>	<p>Mentorship process to support CSOs to develop or review the following:</p> <ul style="list-style-type: none"> <li>• Organogram</li> <li>• HR Policy (Signed)</li> <li>• HIV Policy and Procedure</li> <li>• Recruitment and selection policy and procedures</li> <li>• Volunteer Policy and Procedure</li> <li>• Signed employment contracts.</li> <li>• Signed Job descriptions</li> <li>• Template for minutes of staff meetings</li> </ul>	<p>All mentored CSOs to have the following documents on file:</p> <ul style="list-style-type: none"> <li>• Organogram</li> <li>• HR Policy (Signed)</li> <li>• HIV Policy and Procedure</li> <li>• Recruitment and selection policy and procedures</li> <li>• Volunteer Policy and Procedure</li> <li>• Signed employment contracts.</li> <li>• Signed Job descriptions</li> <li>• Template for minutes of staff meetings</li> </ul>
<b>Administration</b>	<p>Mentorship process to support CSOs to develop or review the following;</p> <ul style="list-style-type: none"> <li>• Filing System (Electronic and Manual)</li> <li>• SOPs for Stock Management (Dependant if CSO works with any stock)</li> <li>• Asset Register</li> <li>• Lease agreements and related issues.</li> </ul>	<p>All mentored CSOs to have the following documents on file;</p> <ul style="list-style-type: none"> <li>• Filing System (Electronic and Manual)</li> <li>• SOPs for Stock Management (If applicable)</li> <li>• Asset Register</li> <li>• Lease agreements where applicable or other documentation related to CSO office usage arrangement.</li> </ul>

<p><b>Financial Accountability</b></p>	<ul style="list-style-type: none"> <li>• Support CSOs to develop, review and or update the following.</li> <li>• Financial policy</li> <li>• File educational qualifications of financial staff &amp; trainings attended.</li> <li>• Audit reports</li> <li>• Procurement guidelines</li> <li>• Segregation of duties stipulated in financial policy.</li> <li>• Risk and fraud prevention plan</li> <li>• Updated asset register.</li> <li>• Time sheets</li> <li>• Travel policy</li> <li>• Petty cash management policy</li> <li>• Financial filing system</li> </ul>	<ul style="list-style-type: none"> <li>• SP to ensure all mentored CSOs to have the following documents on file</li> <li>• Financial policy</li> <li>• File educational qualifications of financial staff &amp; trainings attended.</li> <li>• Audit reports</li> <li>• Procurement guidelines</li> <li>• Segregation of duties stipulated in financial policy.</li> <li>• Risk and fraud prevention plan</li> <li>• Updated asset register.</li> <li>• Time sheets</li> <li>• Travel policy</li> <li>• Petty cash management policy</li> <li>• Financial filing system</li> </ul>
<p><b>Sustainability</b></p>	<p>Support CSOs to develop, review and or update the following;</p> <ul style="list-style-type: none"> <li>• Sustainability plan</li> <li>• Resource mobilisation strategy</li> </ul>	<p>SP to ensure all mentored CSOs have the following documents on file;</p> <ul style="list-style-type: none"> <li>• Sustainability plan</li> <li>• Resource mobilisation strategy</li> </ul>
<p><b>Communication and Marketing</b></p>	<p>Support CSOs to develop, review and or update the following;</p> <ul style="list-style-type: none"> <li>• Communication plan/Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• SP to ensure all mentored CSOs have a communication plan/strategy in place</li> </ul>
<p><b>Community Linkages and Networking</b></p>	<ul style="list-style-type: none"> <li>• Support CSOs to prepare for and or conduct community needs assessment;</li> <li>• Develop a proper referral system</li> </ul>	<p>SP to ensure CSOs have</p> <ul style="list-style-type: none"> <li>• Community needs assessment strategy/ proposal</li> <li>• All tools developed and used for community assessment</li> <li>• Community assessment report</li> </ul>

	<ul style="list-style-type: none"> <li>• Support CSOs to source relevant MOUs from key stakeholders and partners</li> </ul>	<ul style="list-style-type: none"> <li>• Referral system</li> <li>• Developed and signed MoUs</li> </ul>
<b>MERL</b>	<ul style="list-style-type: none"> <li>• Annual Work plan/Operational plan</li> <li>• Monitoring &amp; Evaluation Framework</li> <li>• Data collection tools</li> <li>• Data management plan</li> </ul>	<p>SP to ensure CSOs have</p> <ul style="list-style-type: none"> <li>• Annual Work plan/Operational plan</li> <li>• Monitoring &amp; Evaluation Framework</li> <li>• Relevant data collection tools</li> <li>• Data management plan</li> </ul>
<b>CRS Programme</b>	<p>Support CSOs to develop, review and or update the following;</p> <ul style="list-style-type: none"> <li>• Programme Categorisation</li> <li>• Selection criteria for services</li> <li>• Record keeping system</li> <li>• Referral Policy and SOP</li> <li>• Programme Statutory Requirements</li> <li>• Programme description</li> <li>• Programme inclusivity in terms of key population: Policy</li> <li>• Stigma and Discrimination Programme Description</li> <li>• TB Programme Description (If implementing)</li> <li>• HIV Prevention Programme Description</li> <li>• Adherence Support Programme Description (If implementing)</li> </ul>	<p>SP to ensure CSOs have all the following documents;</p> <ul style="list-style-type: none"> <li>• Programme Categorisation</li> <li>• Selection criteria for services</li> <li>• Record keeping system</li> <li>• Referral Policy and SOP</li> <li>• Programme Statutory Requirements</li> <li>• Programme description</li> <li>• Programme inclusivity in terms of key population: Policy</li> <li>• Stigma and Discrimination Programme Description</li> <li>• TB Programme Description (If implementing)</li> <li>• HIV Prevention Programme Description</li> <li>• Adherence Support Programme Description (If implementing)</li> </ul>



	<ul style="list-style-type: none"> <li>• Linkages with District/Provincial Health Structures (MOU)</li> </ul>	<ul style="list-style-type: none"> <li>• Linkages with District/Provincial Health Structures (MOU)</li> </ul>
<p><b>Health Services and Product</b></p>	<p>Support CSOs implementing HTS to procure, develop, review and or update the following;</p> <ul style="list-style-type: none"> <li>• HTS Protocol</li> <li>• MOU with local health facility</li> <li>• Stock Card System</li> <li>• SOP: Waste management</li> <li>• SOP: Stock management</li> <li>• Temperature Charts for Rooms</li> <li>• All policies and Legal Frameworks</li> <li>• Consent forms</li> <li>• Referral forms</li> <li>• Linkage register</li> <li>• HTS register.</li> <li>• HTS QA proof of Supervision</li> <li>• Up to date HTS Certificates</li> <li>• Job description for HTS Counsellors</li> <li>• NSP for HIV, STIs and TB 2017-2022</li> <li>• HIV Testing Services Policy: 2016</li> <li>• The Children’s Act</li> <li>• PMTCT/ Emtct Guidelines</li> <li>• Condom Distribution Plan. TB Guidelines 2014</li> </ul>	<p>Ensure CSOs implementing HTS have the following in place;</p> <ul style="list-style-type: none"> <li>• HTS Protocol</li> <li>• MOU with local health facility</li> <li>• Stock Card System</li> <li>• SOP: Waste management</li> <li>• SOP: Stock management</li> <li>• Temperature Charts for Rooms</li> <li>• All policies and Legal Frameworks</li> <li>• Consent forms</li> <li>• Referral forms</li> <li>• Linkage register</li> <li>• HTS register.</li> <li>• HTS QA proof of Supervision</li> <li>• Up to date HTS Certificates</li> <li>• Job description for HTS Counsellors</li> <li>• NSP for HIV, STIs and TB 2017-2022</li> <li>• HIV Testing Services Policy: 2016</li> <li>• The Children’s Act</li> <li>• PMTCT/ Emtct Guidelines</li> <li>• Condom Distribution Plan. TB Guidelines 2014</li> <li>• PACK (WC Only) APC/PC101 Guidelines</li> </ul>

	<ul style="list-style-type: none"> <li>• PACK (WC Only) APC/PC101 Guidelines</li> <li>• Adherence policy</li> <li>• QA Policy</li> <li>• SOPs related to HTS.</li> <li>• Requisition form</li> <li>• SOP Waste Management</li> <li>• SOP Procurement/Stock Management</li> <li>• HTS Register</li> <li>• HTS Protocol Inclusive of target group</li> <li>• Index Case Trailing-Proof of training and implementation</li> <li>• Condom distribution plan or Strategy for distribution</li> <li>• SOP for RTCQI: IQP</li> <li>• SOP for RTCQI:PT</li> </ul>	<ul style="list-style-type: none"> <li>• Adherence policy</li> <li>• QA Policy</li> <li>• SOPs related to HTS.</li> <li>• Requisition form</li> <li>• SOP Waste Management</li> <li>• SOP Procurement/Stock Management</li> <li>• HTS Register</li> <li>• HTS Protocol Inclusive of target group</li> <li>• Index Case Trailing-Proof of training and implementation</li> <li>• Condom distribution plan or Strategy for distribution</li> <li>• SOP for RTCQI: IQP</li> <li>• SOP for RTCQI:PT</li> </ul>
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5.2 The successful service provider will be expected to conduct the mentoring and coaching for 164 CSO's after every OCAs and subsequent trainings, mentoring may take place before or after training interventions.

5.3 The successful service providers will be expected to conduct the mentoring over a period of eighteen (18) months starting in September 2023 to March 2025. Service providers must note that Beyond Zero will provide assessment data and capacity development plans for all 164 CSOs.

**6. DELIVERABLES**

The service provider will be expected to deliver the following:

- 6.1 Project Inception report – detailing the service provider’s overall approach, detailed project conceptual framework with detailed methodology, work plan, budget/financial costs, and internal capacity.
- 6.2 Key Informant interviews with each of the 164 CSOs to identify priorities and needs in the capacity development plans to inform development of the mentoring plan and approach linked to the Capacity Assessment roll out eighteen (18) month plan.
- 6.3 Produce comprehensive individual reports for each CSO’s with detailed findings and recommendations addressing the issues for the mentoring. The reports shall be drafted after each phase of the OCA that is the Baseline, Mid-term and End-term assessments.
- 6.4 Development of individual 164 CSO proposed mentoring plans at Baseline, Mid-term and End-term allowing the CSO to review performance at different phases. Highlight organizational strengthening methods / approaches.
- 6.5 Develop, organise, and deliver one-on-one on-site or virtual feedback meeting to each CSO after the assessment for all the baseline, midterm and end term stages.
- 6.6 Produce a mentoring report at the exit stage.
- 6.7 Document success stories on OD activities.

## **7. BID RESPONSE REQUIREMENTS**

- 7.1 Beyond Zero intends to contract service provider/s with suitable qualifications and extensive experience. A Service Provider with knowledge and experience in using the CAT such as the one developed by USAID/Global Fund would be an added advantage.
- 7.2 The bidder must submit three (3) written relevant contactable references letters (contact name, position, contact details and dated) whereby work of a similar nature was successfully executed. The reference letter must be in the client’s company letterhead and must not be older than five (5) years.
- 7.3 The bidder’s proposed Project Lead(s) is required to have experience in leading similar projects and working with civil society organisations and / or on good governance issues within the public sector. The bidder must submit a brief CV(s) not more than 5 pages of the Project Lead(s) clearly showing the years of experience and also certified qualification copies not older than six (6) months.
- 7.4 The proposed team must have relevant qualifications, skills and experience in similar projects and working with CSO’s. The bidder must submit CVs of three (3) of their key team members;

and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. **The team members in the different provinces must be conversant in the language spoken in those provinces.** *The team members must have a degree/diploma in related fields such as: International Development, Social Sciences, Governance, Civil Society development, Community development and /or other related fields.*

- 7.5 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 and deliverables, research methods, use of statistical software, data gathering and analysis, and reporting.
- 7.6 Bidders must clearly indicate which province they are bidding for; bidders are allowed to bid for more than one province provided they currently have a footprint in the provinces. Bidders must Proof of residence in the selected region/district as indicated in the tender document. Verifiable Water, Electricity or Levy account in the name of the company/firm. Lease agreement accompanied by Landlord affidavit.
- 7.7 Bidders must provide a breakdown of professional fees / cost structure for services to be rendered including equipment hire. Bidders must not include Travel and Accommodation fees as part of their costing as these will be covered by Beyond Zero.

## **8. EVALUATION CRITERIA**

- 8.1 The evaluation of proposals will be managed by an Evaluation Committee which will prepare a shortlist of applicants that meet the eligibility for appointment.
- 8.2 The evaluation process will be conducted according to the following stages:
- **Stage 1:** Assessment of administrative compliance with eligibility criteria. Applications that do not comply will not be evaluated further.
  - **Stage 2:** Assessment on functionality/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:** The final stage of evaluation will be the application of the preference points system price at 80 points and B-BBEE 20 points.

The weighting of the overall competence score is as follows:

### **8.3 STAGE 1: PRE-QUALIFICATION/ ELIGIBILITY EVALUATION**

**Table 1: Pre-qualification/ eligibility evaluation**

CRITERIA	SUB-CRITERIA	Comply/Not Comply
	CIPC Registration Documents	
	Valid VAT registration certificate /Notice of Vat Registration for all expenditure more than R1 million	
	Bank account verification letter	
	SARS Tax Clearance Status/pin	
	Valid BBB-EE Certificate (from SANAS Accredited Verification Agency)	
	Costing Proposal/ Pricing Schedule Annexure B	
	Completed and signed Declaration of Interest	
	Signed Global Fund Code of Conduct for Suppliers of Services	

**8.4 STAGE 2: FUNCTIONALITY/TECHNICAL EVALUATION CRITERIA**

Only service providers who score **70 points** or more in stage 2 will be evaluated further in stage 3 and therefore eligible for the award.

**Table 2: Functionality/technical evaluation**

Criteria	Description	Weighting
<b>Company /Directors Experience</b>	<p>The service provider must provide written contactable reference letters of recent and current similar 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 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>30 points</b></p> <p>Two (2) contactable references provided = <b>20 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>	30
<b>Methodology and approach</b>	The service provider must submit a methodology detailing operational plan with clear details to	30

Criteria	Description	Weighting
<p>(Execution Plan / approach to deliver identified outputs/deliverables including delivery team structure)</p>	<p>demonstrate understanding of the assignment. An indication of the approach to carrying out the assignment, this must include the actual process on how the service would be provided, a provisional project plan with timelines. (i.e., delivery/collection points, frequency, turnaround time, etc.) including delivery team structure, communication and operational tools, reporting, etc.</p> <p><b>Scoring Matrix:</b></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>30 points</b></p> <p><b>Good:</b> Satisfies the requirements. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled = <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>20 points</b></p> <p><b>Minor Reservations:</b> Satisfies the requirement with minor reservations. The response addresses a broad understanding of the requirement but may lack details on how the requirement will be fulfilled in certain areas = <b>15 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><b>Resources Qualifications and Experience</b></p>	<p>Bidder must attach a brief Curriculum Vitae (CV) for the Project Lead role indicating relevant experience and a tertiary qualification in healthcare studies or International Development or Social Sciences or Governance or Civil Society development, Community development and /or other related fields.</p>	<p>20</p>

Criteria	Description	Weighting
	<p><b>Note to Bidder:</b> Certified copy of academic degree certificate, not older than six (6) months, in the fields specified above is a precondition, and failure to provide the proof may result in a bidder scoring zero for this criterion.</p> <p><b>Scoring Matrix:</b></p> <p>Five (5) years' relevant experience or more with <b>master's degree (SAQA NQF level 9) =15 points</b></p> <p>Four (4) years' relevant experience with <b>Honour's Degree (SAQA NQF level 8) = 10 points</b></p> <p>Three (3) years' relevant experience with <b>bachelor's degree (SAQA NQF level 7) = 7 points</b></p> <p>Two (2) years' relevant experience with <b>National Diploma (SAQA NQF level 6) = 5 points</b></p> <p>Less than two (2) years' experience = <b>0 points</b></p>	
	<p>Bidder must attach a brief CV's for of three (3) of their key team members, indicating relevant experience and proof of degree / diploma as minimum requirement in healthcare studies or International Development or Social Sciences or Governance or Civil Society development, Community development and /or other related fields.</p> <p><b>Note to Bidder:</b> Certified copy not older than six (6) month of degree certificates for each member in the fields specified above is a precondition, and failure to provide the proof may result in a bidder scoring zero for this criterion.</p> <p><b>Scoring Matrix:</b></p> <p>Four (4) years' relevant experience or more for each of the three key team members = <b>15 points</b></p> <p>Three (3) years' relevant experience for each of the three key team members = <b>10 points</b></p> <p>Two (2) years' relevant experience for each of the three key team members = <b>7 points</b></p> <p>One (1) year relevant experience for each of the three key team members = <b>5 points</b></p> <p>Less than one (1) year experience = <b>0 points</b></p>	20

Criteria	Description	Weighting
<b>Locality</b>	<p>Proof of residence in the selected province/district as indicated in the tender document. Verifiable Water, Electricity or Levy account in the name of the company/firm. Lease agreement accompanied by Landlord affidavit. Failure to submit will result in zero points.</p> <p>Head office based in the selected region/ district = <b>10 Points</b></p> <p>Branch/operational office based in the selected Province/ region = <b>5 Points</b></p> <p>No office in any province or neighboring province = <b>0 points</b></p>	10
The minimum qualifying score for functionality/technical evaluation will be 70 points overall, and service providers that fail to achieve the minimum qualifying score will be disqualified.		100

### 8.5 Stage 3: PRICE AND B-BBEE EVALUATION

Service Providers that have successfully scored 70 points and above in the technical/functionality evaluation stage will be evaluated on stage 3 (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:

Price and B-BBEE	Weighting
Price	80
B-BBEE	20
Total	100

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

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



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

**BBBEE 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

## 9. PRICING SCHEDULE

Service providers must complete costing module as **Annexure B** for the provinces/ regions bidding for to be used per request, inclusive of VAT where applicable.

### **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.