

**Appointment of a Service Provider to Provide Records Management System
for Agreement South Africa.**

RFP Number	ASA 03/01/2021
Date of issue	01/09/2021
Bid Closing date	15/09/2021 at 12:00 pm
Submissions	<u>Dmamaregane@agrement.co.za</u>

1. BACKGROUND

Section 13 of the National Archives and Records Service of South Africa Act, No. 43 of 1996, requires public entities to manage its records in a well-structured record keeping system, and to put the necessary policies and procedures in place to ensure that its record keeping, and records management practices comply with the requirements of the National Archives and Records Service of South Africa Act, No. 43 of 1996.

Information is a resource of the same importance to good management as other standard resources like people, money and facilities. The information resources of ASA must therefore be managed as a valuable asset.

Appropriate records management is a vital aspect of maintaining and enhancing the value of this asset. ASA considers its records to be a valuable asset to:

- Enable ASA to find the right information easily and comprehensively.
- Enable ASA to perform its functions successfully and efficiently and in an accountable manner.
- Support the business, legal and accountability requirements of ASA.
- Ensure the conduct of business in an orderly, efficient and accountable manner.
- Ensure consistent delivery of services.
- Support and document policy information and administrative decision-making.
- Provide continuity in the event of a disaster.
- Protect the interests of ASA and the rights of staff, clients, present and future stakeholders; and
- Support and document ASA's activities, development and achievements.

Records management, through the proper control of the content, storage and volume of records, reduces vulnerability to legal challenges or financial loss and promotes best value in terms of human and space resources through greater coordination of information storage systems.

2. INVITATION FOR PROPOSALS

Agreement SA requests proposals and quotations from suitable suppliers to provide records management, archives, and tracking system services.

3. SCOPE OF WORK

The appointed service provider will be expected to perform the following services as duties and responsibilities:

- Assist the entity to develop a File Plan in accordance with the requirements of the National Archives and Records Service of South Africa Act, No. 43 of 1996.
- Facilitate Records Management training/workshops for the entity across all departments to ensure implementation of ASA's Records Management Policy.
- Assist the entity to develop a proper Records Management System in line with legislative prescripts, ASA's policy and best practice.
- Ensure ASA's records management conforms to the ISO standards and best practice for documented information
- Assist the entity with management of records from ALL records allocated in different storage sites.
- Peruse all records and draw a report of records to be stored, archived, and disposed by the entity; and
- Propose off-site storage facility and send files to off-site storage upon approval.

4. DURATION

These services will be required for a period of one year.

5. SUBMISSION OF PROPOSALS AND QUALIFYING CRITERIA

#	Description	Weight (%)
1	<p>10 years' experience indicating number of years in provision of Records Management, Indexing, Archiving and Tracking system(s), Development of File Plan And knowledge of ISO standards relating to documented information.</p> <ul style="list-style-type: none"> • No demonstration of years' experience = 0 • Newly registered = 1 • Below 5 years = 2 • 5 years = 3 • 6-9 years = 4 • 10 years plus = 5 	40
2	<p>Adherence to the specification and quality of offering where the bidder must submit a portfolio detailing the functionality and features of the solution. Bidder must submit a presentation demonstrating an overview of the solution functionality.</p> <p>No portfolio/presentation submitted = 0 Points</p> <p>Portfolio/presentation does not adhere to specifications = 1 point</p>	40

	Portfolio/presentation adheres to specifications = 3 Points	
	Portfolio/presentation exceeds specifications = 5 Points	
3	References where similar services were rendered. At least 3 contactable references where Records Management, Indexing, Archiving and Tracking system(s) were rendered including value and duration. No reference = 0 Points 1 reference = 1 point 2 references = 3 Points 3 references = 5 Points	20
	TOTAL	100

- The service provider should have the ability to adhere to deadlines and flexibility (delivery deadline will be shared once service provider is appointed).

SUBMISSION OF PROPOSALS

- National Treasury's Central Supplier Database (CSD) report. It must be noted that no contract with a service provider will be entered if such service provider is not registered on the CSD,
- Valid B-BBEE Certificate,
- Valid Tax Clearance Certificate/Tax Pin,
- Completed Standard Bid Forms(Form SBD 4, 6.1 ,8 and 9)
- Signed General Conditions of Contract.
- All proposals will be evaluated by an evaluation team for functionality and price
- All proposals should include:
 - Company profile clearly indicating the number of years' experience in records management
 - bidder must submit a portfolio detailing the functionality and features of the solution
 - Reference letters from contactable referees where similar services were provided.
 - An all-inclusive quotation as per the price schedule below.

After considering the functional criteria, a bidder is considered to have passed the functional requirements if they have scored 70% or more to be considered for Price and BBEE

6. Evaluation Phases:

The following formula will be used to convert the points scored against the weight:

$$Ps = \left(\frac{So}{Ms} \right) \times 100$$

Where:

Ps = Percentage scored for functionality by bid under consideration

So = Total score of bid under consideration

Ms = Maximum possible score

Service providers will be expected to achieve a minimum threshold score of 70% to proceed to Phase 2.

Phase 2: Calculation of points

Please note for quotations or bids above R30 000 up to R50 Million, ASA evaluates these in terms of the 80/20 preference point system where:

80 points are allocated for price and 20 points are allocated for the service provider's B-BBEE Level of Contribution. An original or certified copy of a B-BBEE certificate must be submitted to substantiate claims for preference points.

A due diligence process in a form of a presentation will be conducted in respect of all short-listed bidders. A set of questions will be posed during the presentation. Should the bidder fail to meet the requirements of the due diligence process, their proposal will be disregarded at this stage.

ASA also reserves the right to conduct an investigation of the bidder's financial position, previous contracts carried out, availability of skills or knowledge, existing workload, etc.

During phase 2, points for price will be calculated for all shortlisted service providers in accordance with the following formula:

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where:

- Ps = Points scored for price of quotation under consideration
 Pt = Rand value of quotation under consideration
 Pmin = Rand value of lowest acceptable quotation

The final points will be calculated as follows:

CRITERIA	SUB-CRITERIA	WEIGHTING POINTS
Price	Detailed budget breakdown	80
B-BBEE (Status Level Verification Certificate)	B-BBEE Level Contributor	20
TOTAL		100

POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

EMEs are deemed to have a B-BBEE status level four (4) contributor, in instances where EMEs are more than 50% black owned, such enterprises qualify for promotion to a BBEE status level three (3) contributor and points will be awarded accordingly.

Please note that the proposals will be evaluated using the 80/20 preference point system.

A recommendation for award will then be formulated for approval by the relevant delegated authority.

Price Schedule

DESCRIPTION	Year 1 (incl VAT)
Document Management Solution (00 users) for one year	
Support and maintenance	
Onsite Training- to include all costs	
Any other cost- please specify	
TOTAL CONTRACT AMOUNT (EXCLUDING VAT)	
GRAND TOTAL INCLUDING VAT	

NO LATE SUBMISSIONS WILL BE ACCEPTED

Written enquiries:

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7. COPYRIGHT AND INTELLECTUAL PROPERTY RIGHTS

In consideration of the fees paid, the service provider expressly assigns to ASA any copyright arising from the works the consultant produces while executing this contract. The consultant may not use, reproduce or otherwise disseminate or authorise others to use, reproduce or disseminate such works without prior consent from ASA.