

REQUEST FOR TENDER

for

**THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE THE
SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE WITH
WRITING SUPPORT TO GENERATE CONTENT AND DEVELOP
SCIENCE-BASED POLICY ADVICE PRODUCTS FOR A THREE (3)
YEAR PERIOD**

**South African National Biodiversity Institute (SANBI)
Private Bag X101
Silverton
0184
South Africa**

Tender No: SANBI:BIPA382/2021

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1. Introduction and background

The South African National Biodiversity Institute (SANBI) contributes to South Africa's sustainable development by facilitating access to biodiversity data, generating information and knowledge, building capacity, providing policy advice, showcasing and conserving biodiversity in its national botanical and zoological gardens.

SANBI ensures that the best available scientific knowledge and information, generated by SANBI and its partners, is used to inform policy and decision-making. This supports better management and conservation of South Africa's biodiversity assets and ecological infrastructure, streamlines environmental decision-making, and demonstrates the benefits of biodiversity and ecological infrastructure for people and the economy, including providing water and food security, reducing the risk of disasters and creating jobs.

SANBI uses science-based policy advice products as a way of mainstreaming biodiversity in a range of sectors, as well as sharing information and lessons learnt with partners, stakeholders and other key audiences, at a national and international level. These science-based policy advice products include, but are not limited to, technical reports, guidelines, factsheets, case studies, and posters. Some examples of science-based policy advice products produced by SANBI include factsheets on *Using CBA Maps to support land-use planning and decision-making* and *The Business Case for Biodiversity Stewardship*, and the *Technical Guideline for CBA Maps* (<http://biodiversityadvisor.sanbi.org/>).

Several SANBI projects require writing support to generate content and develop science-based policy advice products that are easily understood by the intended audience. SANBI is committed to building capacity and will also use this as an opportunity to develop writing skills required for developing science-based policy advice products internally. The Service Provider will therefore work closely with project teams to co-produce science-based policy advice products which will involve jointly conceptualising the type of product required, developing the relevant key messages, generating appropriate content and selecting relevant images, and conceptualising infographics and diagrams required for the product.

2. Invitation to tender

Tenders are hereby invited to provide SANBI with writing support to generate content and develop science-based policy advice products for key audiences and to provide support to project teams to co-produce science-based policy advice products for a period of three (3) years.

The tender process will be co-ordinated by SANBI's Supply Chain Management (SCM) department, contactable at the following address:

Deputy Director: Supply Chain Management
The South African National Biodiversity Institute (SANBI)
Private Bag X101
Silverton

0184

Email: sanbi.tenders@sanbi.org.za

The tender closes on 26 February 2021 at 11:00

3. Briefing session

SANBI is committed to the health and safety of all bidders and staff members, and reducing the spread of COVID-19. As a result, with guidance from regulations published by the National Department of Health, no briefing session will be held.

Bidders are encouraged to direct all technical and bidding procedure enquiries to the email addresses below. All responses will be communicated via this tender's advertisement webpage on the SANBI website www.sanbi.org.

- For bidding procedure enquiries: sanbi.tenders@sanbi.org.za
- For technical enquiries: t.smith@sanbi.org.za

Cut-off date for enquiries: 12 February 2021 at 12:00

4. Scope of work

SANBI wishes to appoint a Service Provider with the necessary experience and skills to provide writing support to generate content and develop science-based policy advice products for SANBI, as well as to support the development of the required writing and interpretation skills in SANBI's project teams to co-produce science-based policy advice products.

In the course of achieving this scope of work, the Service Provider will be expected to:

- Work closely with the Deputy Director: Knowledge Coordination and Reporting as well as with the relevant project teams responsible for developing a specific science-based policy advice product.
- Participate in relevant project team meetings, workshops and forums that are relevant to the development of a specific science-based policy advice product.
- Engage actively with organisations identified as key partners and stakeholders for a specific science-based policy advice product.
- Work closely with SANBI project teams to develop skills and capacity for co-producing science-based policy advice products.

The design and layout of the developed science-based policy advice products will be done by SANBI's Graphics & Editing Unit or an appointed graphics designer. These costs will be covered by SANBI in line with its procurement processes. Any printing costs required to produce hard copies of the products will be covered by SANBI in line with its procurement processes.

4.1. Requirements of the Service Provider

The successful Service Provider will be responsible for the following activities in line with the above scope of work:

a) Generate content and develop science-based policy advice products

- Work with the project team responsible for a specific product to identify the type of product required for the particular audience. The theme of the identified product will be decided based on SANBI's priorities and needs of project partners and stakeholders.
- Gather relevant material and information from the project team, and additional sources, as required, to gain a thorough understanding of the background and requirements for the product.
- Develop a concept note, with the project team, to ensure a common understanding of the required product.
- Develop an outline and structure of the product for presenting to the project team for sign off.
- Work with the project team to develop a first draft of the identified product, distilling complex information into easily accessible content for the intended audience, and providing key messages. This first draft will be discussed and reviewed by the project team. SANBI's writing and style guidelines must be followed in the development of the text.
- Advise on the selection of images and help to conceptualise infographics, diagrams and maps to support the text and the key messages and provide visual appeal to the product.
- Develop a second draft, following the review by the project team, for further discussion and, if required, distribution to a broader group of partners for review.
- Provide a final draft of the product, incorporating all relevant comments from the review process, for final sign off by the project team as well as the Deputy Director: Knowledge Coordination and Reporting, prior to production.
- Liaise with the SANBI Graphics & Editing Unit, or the appointed graphic designer, to ensure all requirements are met for production.
- Provide SANBI Graphics & Editing Unit, or the appointed graphic designer, with the final version of text, together with all images, maps and diagrams required for layout as well as requirements for any infographics for editing and layout.
- Review the proof of the product once received from the SANBI Graphics & Editing Unit, or the appointed graphic designer, to ensure correctness and liaise with the editors and graphic designers if any changes are required.
- Obtain sign-off on the final proof of the product from the relevant project team and the Deputy Director: Knowledge Coordination and Reporting.

b) Support the development of writing skills through the co-production of science-based policy advice products.

- Work, as part of a SANBI project team, to co-produce science-based policy advice products based on SANBI's priorities and the need to develop writing and interpretation skills.

- Provide mentorship and guidance to identify, with the project team, the type of science-based policy advice product best suited for an intended audience and suitable key messages.
- Support project teams to distil complex information into appropriate content and review content generated by members of the project team, providing feedback and advice.
- Provide copy editing support, as required, to SANBI staff and project teams on science-based policy advice products to improve their accessibility for key audiences, as well as ensuring that the text is free of grammatical and factual errors.
- Support the development of skills and build capacity within SANBI project teams to produce science-based policy advice products for biodiversity sector priorities.

4.2. Key skills and competencies required

The Service Provider must have excellent writing skills and experience in developing science-based policy advice products for the biodiversity sector. The Service Provider must excel at the following:

- Conceptualising, analysing and writing accurate, high quality material for science-based policy advice products like technical reports, guidelines, factsheets, case studies etc.
- Engaging, at a detailed level, with complex information and distilling this information accurately and succinctly into an easily accessible content, together with infographic and diagram concepts, for key audiences.
- Working collaboratively with project teams and managing processes that require detailed inputs from a range of relevant stakeholders.
- Identifying and understanding key audiences and the appropriate mechanisms and ways of reaching these audiences.
- Understanding South Africa's biodiversity issues and how these link to benefits for society and nature.

The Service Provider also needs to have skills and experience in:

- Supporting the development of writing skills in others.
- Providing copy editing support and guidance.
- Working independently and delivering efficiently on high quality deliverables within tight timeframes and on an agreed fixed budget.

An understanding of SANBI's mandate will be an added advantage. The Service Provider should also be willing to travel nationally for meetings and/or working sessions as required. The Service Provider must hold a post graduate qualification.

4.3. Deliverables and timeframes

The Service Provider will be appointed over a three-year (36 month) period, commencing in April 2021. It is anticipated that the scope of work represents approximately 30 – 40% of a one-person year over this period.

The number of science-based policy advice products developed will be decided and finalised through meetings with the core SANBI team and depending on SANBI priorities. The process for supporting the development of writing skills will be discussed with the core SANBI team based on the needs of the project teams and in accordance with SANBI's way of working collaboratively.

The Service Provider will be required to submit:

- A draft work plan outlining the programme of work to be followed for the first year of the contract, closely informed by the inception session with a core SANBI team. Each year a new work plan will be developed, guided by SANBI's priorities. The balance between the development of science-based policy advice products by the Service Provider and support to the development of writing skills will be reviewed regularly and if necessary, the work plan will be revised quarterly to incorporate any changes.
- A concept note, for each science-based policy advice product being developed, following the initial meeting with the project team.
- An outline and structure for each science-based policy advice product being developed for sign-off by the project team.
- Drafts of each science-based policy advice product as agreed at project team meetings and signed off by the relevant project team manager and Deputy Director: Knowledge Coordination and Reporting. This will include images selected and conceptualised infographics, diagrams and maps.
- Final draft of each science-based policy advice product signed off by the relevant project team manager and Deputy Director: Knowledge Coordination and Reporting, together with a summary of the review process as well as the design and layout process, if required.
- Final copy (or print ready copy) of each science-based policy advice product, following the design and layout process, and signed off by the relevant project team manager and Deputy Director: Knowledge Coordination and Reporting.
- Brief quarterly progress reports showing progress on development of science-based policy advice products as well as progress in developing the required writing and interpretation skills, highlighting the co-production work with individual and project teams. These reports will be used as a basis for any reviews required to the work plan and to guide project team planning meetings.
- A final report detailing the science-based policy advice products developed, the support provided to develop writing and interpretation skills for the co-production of science-based policy advice products as well as any lessons learnt and recommendations for next steps.

5. Requirements for proposals

5.1. Mandatory documents required

Each submission must include the following **(failure to provide below documentation will result in the tender being rejected)**:

- Note that for this tender, the following pre-qualification criterion for preferential procurement will be applied:

- An Exempt Micro Enterprise ("EME") or Qualifying Small Enterprise ("QSE"). EMEs are firms with an annual total revenue of R10 million or less and QSEs are firms with an annual total revenue of between R10 million and R50 million;
- A certified copy or original valid B-BBEE Status Level Certificate or sworn affidavit.
- A letter of Good Standing from the office of the Compensation Commissioner as required by the Compensation for Occupational Injuries and Diseases Act (COIDA), if applicable. The letter should be issued by the Department of Labour.
- A copy of the Central Suppliers Database (CSD) registration report.
- Fully completed SBD forms.
- Pricing details (see Annexure 1). **The pricing details must only be included in the 'original' document as per the section on submission below. Inclusion of pricing in the electronic copy delivered on the USB will result in the tender being rejected (see Section 7).**
- UIF compliance demonstrated by submission of one of the following:
 - A valid copy of the UIF Letter of Compliance issued by the Department of Labour, or
 - Labour uFiling Employer Statement of Account indicating UIF payments or accruals not older than 12 months, or
 - SARS eFiling Employer Statement of Account indicating UIF payments or accruals not older than 12 months, or
 - Valid proof of exemption for UIF.

5.2. Other documents for evaluation

Service Providers interested in contributing towards this work should submit a concise written proposal that addresses the scope of work and the above requirements and deliverables. Failure to submit these documents will not result in disqualification, however, the information contained in them is required for evaluation purposes. The proposal must include:

- Details of the Service Provider highlighting relevant experience, skills, competencies and track record. An up-to-date CV(s) must be included.
- A detailed proposed approach to delivering on this scope of work including providing writing support to generate content and develop science-based policy advice products as well as an approach to developing writing and interpretation skills for the co-production of products. This should include a proposed start and completion date and timeframes for activities.
- At least three examples of relevant writing, within the last five years, that the Service Provider was personally responsible for.
- Examples of experience in developing writing and interpretation skills in others through the co-production of products, including the mechanisms used and a summary of the outcomes.
- Details of the scope and scale of similar work done for past and present clients within the last five years.

- References of at least three current or recent clients for which similar work has been done in the last five years. A summary of the scope of the work for each client must be provided.
- A detailed and complete budget for the proposed work, as indicated in Annexure 1, including fees (rate per hour) and VAT for the three-year period. Each of these should be provided separately. It is anticipated that the Service Provider will be required to work 20 hours per week over the three-year period. The Service Provider's hourly rate should include the cost of all overheads, for example telephone and cell phone costs, stationery and office requirements, hardware and software, internet and data costs etc. Travel and accommodation should NOT be included in the budget and will be arranged by SANBI, in line with its policies. Travel requirements will be discussed at the inception meeting. The logistic arrangements and costs of any workshops and meetings will be organised and covered by SANBI and therefore these costs should NOT be included in the budget. Graphic design, layout and printing costs associated with the development of the knowledge products will be covered by SANBI and should NOT be included in the budget. **Note: The budget must only be included in the 'original' document as per the section on submission below. Inclusion of pricing in the electronic copy delivered on the USB will result in the tender being rejected (see Section 7).**

SANBI reserves the right:

- To verify any information supplied in the tender submission;
- To not appoint any Service Provider;
- To cancel or withdraw this tender at any time without attracting any penalties or liabilities;
- To have the final say in the appointment of the Service Provider and that this will be binding;
- To disqualify a tender or cancel any subsequent contracts should it be found that:
 - Information was omitted that should have been disclosed
 - Factually inaccurate information was provided and/or
 - That a misrepresentation of facts has occurred.

SANBI shall not be held liable for any cost that has been incurred by the Service Provider in the preparation of the proposal, the obtaining of certificates or any other cost that might be incurred in submitting the proposal.

6. Submission

The final price must be inclusive of VAT and will be considered the fees for the duration of the contract.

This is a two-envelope tender process. Service Providers are to submit **one (1) pack** of original proposals, marked "ORIGINAL" in an envelope, with pricing included, and **one (1) electronic copy on USB**, marked "COPY" in a second envelope. The electronic copy on the USB must exclude pricing details.

Financial and pricing details must only be included in the pack marked “ORIGINAL”.

NB. Failure to submit:

- one pack of original documents with pricing included; and
- one electronic copy on USB without pricing data

in the prescribed manner WILL lead to the bid being disqualified.

Tenders can be submitted in the tender box located in the reception area of the Biodiversity Centre Building at the Pretoria National Botanical Garden, 2 Cussonia Avenue, Brummeria, Pretoria, during office hours before the tender closing date and time.

Normal office hours are from 08:00 to 16:00 daily. E-mailed and faxed submissions will not be accepted. Late submissions will be disqualified.

7. Evaluation criteria

In accordance with the National Treasury Instruction Note on the Amended Guidelines in Respect of Bids that include Functionality as a Criterion for Evaluation (issued 3 September 2010), this bid will be evaluated in two stages:

The first stage will evaluate functionality according to the criteria listed in the table below.

Functionality Evaluation Criteria	Weight**
Technical merit of proposal: • Approach and understanding of the ToR in terms of writing support for the development of science-based policy advice products. • Approach and understanding of the ToR in terms of support for developing writing and interpretation skills	30 (20) (10)
Experience, qualification, skills and competencies (specific reference must be made to required skills and competencies listed in section 4 above): • Relevant writing experience and skills in developing science-based policy advice products • Relevant experience and skills in developing writing capacity • Comprehensive CV(s) highlighting qualifications and competencies	30 (15) (10) (5)
Relevant and quality of examples of prior written work (minimum of three examples of work): • Quality of the writing provided in terms of structure, correctness, clarity and messaging • Relevance of the examples provided to this scope of work	25 (20) (5)
Overall track record: • Quality of references for three relevant current or recent reference, within the last five years, for which similar work was	15 (10)

done (include names and contact details as well as a brief summary of the services provided)	(5)
Ability to undertake the work, through reference to the scope and scale of similar work done for past and present clients within the last five years	
TOTAL	100

** Service Providers who fail to score a minimum of 70 points out of a possible 100 points on functionality criteria will not be eligible for further consideration.

Sufficient information must be provided to allow the Bid Evaluation Committee to evaluate bids against these functionality criteria.

The second stage will evaluate the price and preference points of those bids that meet the minimum threshold for functionality. In accordance with the Preferential Procurement Regulations, 2017 pertaining to the Preferential Procurement Policy Framework Act (No. 5 of 2000), the 80/20 point system will be applied in evaluating proposals that qualify for further consideration, where price constitutes 80 points and a maximum of 20 points will be awarded based on the bidder's B-BBEE Status Level Certificate.

8. Contract period

The appointment is anticipated to be for a period of three (3) years (36 months). The contractual appointment period will be as stipulated in the Independent Contract Agreement.

9. General Safety, Health and Environmental (SHE) requirements

All Service Providers entering into a contract with SANBI shall, as a minimum, comply with the following requirements, if applicable:

- The Compensation for Occupational Injuries & Diseases Act (Act 130 of 1996): The Service Providers will be required to submit a letter of good standing from the office of the Compensation Commissioner as required by the Compensation for Occupational Injuries and Diseases, if applicable. The letter should be issued by the Department of Labour.
- National Environmental Management Act (Act No. 107 of 1998),
- The South African National Biodiversity Institute Health and Safety specification and relevant policies.

10. General

- All documents submitted in the response to this Request for Tender (RFT) must be written in English.
- Potential Service Providers should not assume that information and/or documents previously supplied to SANBI, at any time prior to this RFT, will be considered, and they should not make reference to such information and/or documentation in their response to the RFT.

- The appointment of a successful Service Provider will be subject to all parties agreeing to mutually acceptable contractual Terms and Conditions. The preferred form of contract for the professional services as per this RFT will be the Independent Contract Agreement.
- The Independent Contract Agreement will be drawn up between SANBI and the Service Provider.
- Invoices will be paid for deliverables received as agreed in this Independent Contract Agreement.
- Invoices must indicate the deliverables produced.
- No upfront payments will be made. SANBI will pay for the satisfactory completion of work within 30 days of submission of invoices.
- Invoices must be addressed to the Deputy Director: Knowledge Coordination and Reporting, SANBI.
- While the Service Provider will be working with a core SANBI team from the Policy Advice and Information Management Division on the development of science-based policy advice products, accountability and reporting will be to the Deputy Director: Knowledge Coordination and Reporting, SANBI.
- A quarterly review of the Service Providers work plan and deliverables will be undertaken with the core SANBI team in order to update the work plan and prioritise the development of the knowledge products.
- The exact number and nature of reports will be agreed between the Service Provider and the core SANBI team.
- Any or all information made available to the Service Provider by SANBI will be regarded as confidential and will not be made available to third parties without the prior written consent of SANBI.
- Copyright of all science-based policy advice products developed will be retained by SANBI.
- All reports and science-based policy advice products submitted must be in MS Office format (Word or Excel preferred).
- An electronic version of all reports must be submitted.
- The tender process will be coordinated by SANBI's Supply Chain Management (SCM) department, contactable at the following email address: sanbi.tenders@sanbi.org.za
- Tender documents will only be available online on the SANBI website www.sanbi.org

11. Annexure 1: Pricing details

	Rate per hour	Number of hours	Fee (Number of hours x rate/hour)	Vat	Total price/year
Year 1		830	R	R	R
Year 2		830	R	R	R
Year 3		830	R	R	R
Final price over the three-year period					R

Please note that all pricing details for the three-year period must be included. The final price over the three-year period must be inclusive of all costs to the Service Provider and will be considered the price for the duration of the contract. The Service Provider's hourly rate should include the cost of all overheads, for example telephone and cell phone costs, stationery and office requirements, hardware and software, internet and data costs etc. **It is anticipated that the Service Provider will be required to work approximately 20 hours per week over the three-year period. However, flexibility will be required from the Service Provider as the exact workload will fluctuate depending on the schedule for the development of science-based policy advice products.**

Travel and accommodation should NOT be included in the budget and will be arranged by SANBI, in line with its policies. The logistic arrangements and costs of workshops and meetings will be organised and covered by SANBI and therefore these costs should NOT be included in the budget. Graphic design, layout and printing costs associated with the development of the knowledge products will be covered by SANBI and should NOT be included in the budget.