

**PART A
 INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE <i>(South African National Biodiversity Institute)</i>					
BID NUMBER:	SANBI: G477/2023	CLOSING DATE:	06 October 2023	CLOSING TIME:	11:00am
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE (SANBI) TO DESIGN, IMPLEMENT, MAINTAIN AND SUPPORT A MEMBERSHIP MANAGEMENT SYSTEM FOR THREE YEARS FOR ALL NATIONAL BOTANICAL AND ZOOLOGICAL GARDENS.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT:					
Biodiversity Centre Pretoria National Botanical Garden, 2 Cussonia Avenue, Brummeria Pretoria					
A compulsory briefing session will be conducted at the time and date given as follows: Date: 22 September 2023 Time: 09:00am Venue: Microsoft Teams Meeting					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	sanbi.tenders@sanbi.org.za		E-MAIL ADDRESS	n.mpulo@sanbi.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA

B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ Yes ☐ No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]			
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS			
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO NO IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.			

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

PRICING SCHEDULE – FIRM PRICES
(PURCHASES)

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of bidder.....Bid number: **SANBI: G477/2023**

Closing Time 11:00

Closing date: **06 October 2023**

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY
-------------	----------	-------------	---------------------------

** (ALL APPLICABLE TAXES INCLUDED)

-
- Required by:
 - At:
.....
 - Brand and model
 - Country of origin
 - Does the offer comply with the specification(s)?
*YES/NO
 - If not to specification, indicate deviation(s)
 - Period required for delivery

*Delivery: Firm/not firm

- **Delivery basis**

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

**** “all applicable taxes” includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.**

***Delete if not applicable**

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

- 2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

- 2.2.1 If so, furnish particulars:

.....

- 2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

- 2.3.1 If so, furnish particulars:

.....

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
(b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.6. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} \end{array}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.7. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.7.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.6. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.7. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Categories of persons historically disadvantaged by unfair discrimination on the basis of race. Information will be verified on the CSD report. Points will be allocated based on the percentage of ownership per goal Black Ownership = 10 Points		(10)		
Categories of persons historically disadvantaged by unfair discrimination on the basis of gender.		(10)		

Information will be verified on the CSD report. Points will be allocated based on the percentage of ownership per goal				
Female Ownership = 10 Points				
Total		20		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.8. Name of company/firm.....

4.9. Company registration number:

4.10. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.11. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

	
	SIGNATURE(S) OF TENDERER(S)
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	
	

REQUEST FOR TENDER

FOR

APPOINTING A SERVICE PROVIDER TO THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE (SANBI) TO DESIGN, IMPLEMENT, MAINTAIN AND SUPPORT A MEMBERSHIP MANAGEMENT SYSTEM FOR THREE YEARS FOR ALL NATIONAL BOTANICAL AND ZOOLOGICAL GARDENS

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

Tender No: SANBI:G477/2023

Contents

1. Introduction and background.....	15
2. Invitation to tender	16
3. Compulsory online briefing session and email enquiries.....	16
4. Scope of work.....	16
4.1 Detailed information about the scope of work	Error! Bookmark not defined.
4.1.1.....	17
4.1.2. Supply software and licenses for the membership programme.	18
4.1.3 System / Technical Requirements:	Error! Bookmark not defined.
4.1.4 Information Security Requirements	Error! Bookmark not defined.
4.1.5 Training and skills transfer to SANBI personnel:.....	18
4.1.6 Maintenance and support	18
4.2 The successful service provider will be	19
5. Competencies of the Service Provider	19
6. Requirements for proposals.....	19
6.1 Mandatory requirements / documents.....	19
7. Pricing.....	20
8. Submission of tender.....	21
9. Evaluation criteria	21
10. Contract period	23

1. Introduction and background

The South African National Biodiversity Institute (SANBI) is a public entity that is mandated by the National Environmental Management: Biodiversity Act (NEMBA), Act No. 10 of 2004. SANBI contributes to South Africa's sustainable development by facilitating access to biodiversity data, generating information and knowledge, building capacity, providing policy advice, and showcasing and conserving biodiversity in its national botanical and zoological gardens.

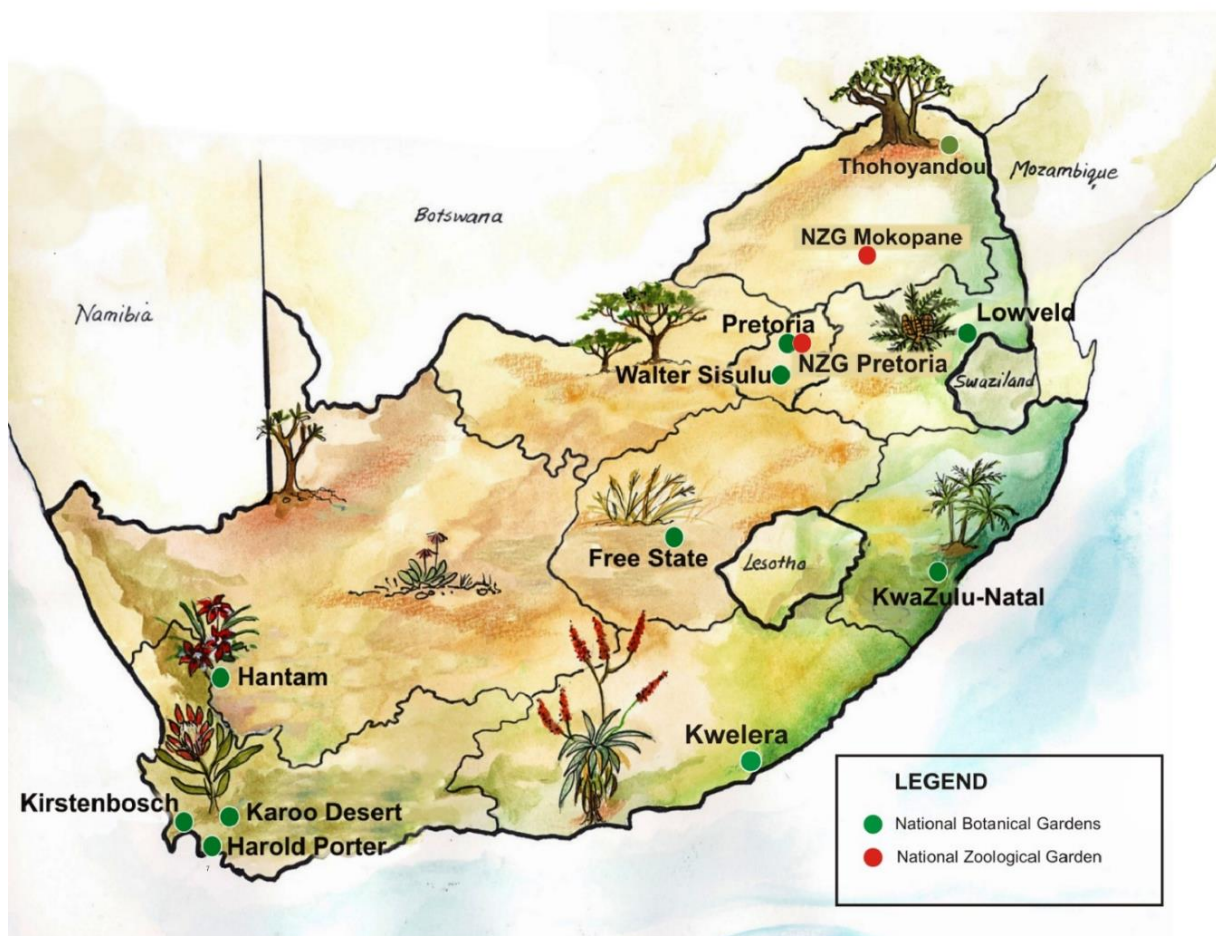
National Botanical and Zoological Gardens

SANBI's mandate is to explore, reveal, celebrate and champion biodiversity for the benefit and enjoyment of all South Africans which includes managing the National Botanical and Zoological Gardens as 'windows' to South Africa's biodiversity for enjoyment and education of all people.

These gardens are situated in eight provinces in South Africa. Kirstenbosch National Botanical Garden is the flagship garden in terms of visitor numbers and revenue generation with Walter Sisulu National Botanical Garden, Pretoria National Botanical Garden and Pretoria National Zoological Garden as the largest contributors to the portfolio of gardens. The majority of SANBI's income comes from garden admissions.

SANBI intends to implement a membership management system for visitors to the national botanical and zoological gardens in order to increase income generated from gardens as well as to broaden garden access to groups which had previously not enjoyed access to our facilities.

SANBI's National Botanical & Zoological Gardens



2. Invitation to tender

Tenders are hereby invited for a Service Provider to provide a membership system to SANBI for a period of three years.

The tender process will be coordinated 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 06 October 2023 at 11:00

3. Compulsory online briefing session and email enquiries

A virtual compulsory briefing session will take place as follows:

Date: 22 September 2023

Time: 09:00

Venue: Microsoft Teams, via the following link: https://teams.microsoft.com/join/19%3ameeting_ZjQyMDVkYmItMDNhNi00YTlkLWFmNWYtNTI0NjFmODdhODZi%40thread.v2/0?context=%7b%22Tid%22%3a%220b847c5e-73e2-4441-8789-9c092d2dd489%22%2c%22Oid%22%3a%220c6c1cd8-b714-4173-86cc-4631abb4f1b7%22%7d

Bidders are encouraged to direct all technical and bidding procedure enquiries to the email addresses below. All responses to questions via email 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: n.mpulo@sanbi.org.za

Cut-off date for enquiries: 28 September 2023 at 12:00.

4. Scope of work

SANBI requires the services of Service Provider to design, implement, maintain and support a membership management system. The tender has the following primary functions, and Service Providers must ensure they are able to fulfil all functions:

1. Design, implement, maintain and support a new membership management system for SANBI's national botanical and zoological gardens.
2. Provide a solution that interfaces with SANBI's current gate takings system.
3. Provide training and skills transfer to SANBI personnel.
4. Deploy the membership system across all national botanical and zoological gardens.
5. Provide maintenance and support services for the management of the new membership system for the three-year period.

4.1 Requirements of the Service Provider

The prospective service provider is required to perform the following functions for the design, implementation, maintenance and support of a new membership management system for SANBI's national botanical and zoological gardens:

4.1.1. Design and implementation of the membership management system

The design of the system must include or allow SANBI to subscribe to an existing membership management system **i.e. provide a turnkey solution**, which also caters for the following requirements:

- Customise the membership management system to accommodate SANBI requirements.
- Provide a single view of the customer, and all customer relevant data in a single database.
- Provide a single source of all contact information to all users, both at head office and at garden level.
- Maintain customer history using automated processes
- Enrich customer data automatically, depending on their visitor behaviour.
- Provide a URL link for the SANBI website.
- Allow for 'print at home' functionality.
- Allow membership card information delivery by email.

The following system and technical requirements are necessary:

- The Service Provider must allow SANBI to migrate its data from the solution when the subscription is terminated.
- The solution must:
 - Be completely web-based
 - Operate in logically coordinated procedures.
 - Have data visibility extensive search capabilities defining any number of properties as search and filter criteria.
 - Provide a dedicated database for SANBI member information and must not operate on a shared environment.
 - Provide consolidated statistics and reports on customer, visitation data and extensive reporting capabilities
 - Provide a system that can be modified and enhanced in the future without extensive re-configuration or development.
 - Restrict access to cardholder data.
 - Create and monitor access logs.
 - Utilise antivirus and anti-malware software.
 - Protect cardholder data.

The following information security requirements are needed for the solution:

- It must use the latest Hypertext Transfer Protocol Secure (HTTPS) and TLS (Transport Layer Security) encryption protocol.
- It must ensure that user accounts for membership have unique usernames or ID.

- It must enable strong password policy.
- As an added security measure, it must have multi-factor authentication (MFA) capability.
- It must have input validation to prevent injection attacks.
- It must ensure that services and resources are only accessed by trusted domains.
- It must have high availability capabilities.
- The application must have a web-application firewall (WAF)

In addition, the Service Provider must:

- Conduct regular penetration tests and vulnerability assessments on the solution.
- Have a disaster recovery plan and solution for the application.
- Ensure that the database for SANBI has strict access control measures and must be encrypted.
- Take daily backup of SANBI's data and the backed-up data must be stored in a different location from where the solution is hosted (e.g., off-site storage).

4.1.2. Supply software and licenses for the membership management system

- The Service Provider is required to provide the annual software and licensing required for the membership management system for the three-year period.
- Provide hosting services for the three year period.

4.1.3. Maintenance and support

- The Service Provider must maintain and support the membership management system post go live state for the three-year period. The Service Provider will be required to provide additional training for operators on request if new users are appointed. This will be over and above the training requirements stated below. The Service Provider must therefore include a price for additional training per person in the pricing schedule below.

4.1.4. Training and skills transfer to SANBI personnel

- The Service Provider is required to train and transfer skills to SANBI personnel to ensure that they can use the system, troubleshoot and fix errors and run updates.
- The printing of user manuals and of training or other communication materials required for this skills transfer (e.g., brochures) will be for the Service Providers cost and must be included in the training costs.
- The users of the system have been identified in the table below as a guide to the training requirements.

Role	Usage (Low/Medium/ High)	Impact (Low/Medium/ High)	Number of users
1. Chief Director: National Botanical Gardens	L	H	One
2. Director: Marketing, Communication and Commercialisation	L	H	One
3. Director: National Botanical Gardens	M	H	One
4. Garden Managers	H	H	Eleven
5. Executive Director: National Zoological Garden	M	H	One

6. Director: Commercial Service National Zoological Garden	H	M	One
7. Garden till operators	H	H	33

4.2 The successful service provider will be required to:

- Commence work immediately after appointment.
- Report timeously and on a regular basis on progress.
- Identify and consult with the relevant internal and external stakeholders.
- Be expected to present the membership management system to MANCO, EXCO, the SANBI Board and/or relevant Committee(s).

5. Key skills and competencies of the Service Provider

The Service Provider will be responsible for providing personnel required to accomplish the scope of work. Should it become necessary to replace any personnel during the course of this tender they may only be replaced with individuals that have similar or better qualifications or experience.

The successful Service Provider's team must possess the following competencies:

- Project management
- Demonstrable technical expertise and knowledge of membership management and retail operations
- Experience in managing online membership systems.
- Experience in conducting training and skills transfer to users.

The Service Provider must be self-motivated and results driven, with the ability to work independently and deliver efficiently on the scope of work and the requirements.

6. Requirements for proposals

6.1. Mandatory requirements / documents

Tenders must include the following documentation (**failure to submit this required documentation will lead to disqualification**):

- A copy of the Central Suppliers Database (CSD) registration report.
- Duly completed and signed SBD forms.
- A letter of Good Standing from the office of the Compensation Commissioner as required by the Compensation for Occupational Injuries and Diseases Act (COIDA). The letter should be issued by the Department of Labour.
- Proposed pricing schedule (Annexure B). NOTE: Financial or pricing details should ONLY be included in the printed document pack marked 'ORIGINAL', and not in the PDF file(s) of the document(s) on the memory stick. Inclusion of pricing in the document pack marked 'COPY' on the memory stick will result in the tender being rejected.
- Compulsory briefing attendance certificate.
- Proof of Payment Card Industry (PCI) compliance certificate. All systems and equipment supplied need to comply with the latest Payment Card Industry/Data Security Standard (PCI/DSS) and Europay, MasterCard, and Visa (EMV) standards and need to be certified by the relevant bodies. As a minimum, the Service Provider must provide proof of a current PCI certification.

6.2. Other documentation required

Service Providers interested in this Request For Tender (RFT) should submit a concise written proposal that addresses the scope of work. 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:

- Company profile detailing the technical system or solution ability of the company to fulfil the requirements of this RFT.
- Details of the Service Provider, including relevant skills, experience, competencies and track record. Short CVs (each CV not more than three (3) pages in total) of each team member who will be involved in this work, detailing their qualifications/training, specialist skills and knowledge, and their relevant experience of similar work related to their role for this tender.
- Detailed proposal and work plan that explains how the Service Provider plans to fulfill the scope of work and requirements of the RFT.
- Contactable references of at least four current or recent clients for which similar work has been done in the last five years. These must include the contract duration, services rendered, referee contacts, value of contract and whether the client is satisfied with the service rendered.
- A list of at least three similar projects carried out within the past five years, with a short description of the work, including the scale of the project.

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.

7. Pricing

The final price, using the format provided in the table below must be inclusive of VAT and will be considered the total cost for the duration of the contract.

The service provider will be required to make two (2) types of payments as follows:

- Once-off payment for planning and designing the system
- Once-off payment for training and skills transfer.
- Once-off payment for each milestone or functionality in the implementation

- Ad-hoc payments for maintenance and support, including additional training requested for a period of three (3) years

Notes on budgeting: Cell phone, computer expenses, internet connectivity and office expenses are for the Service Provider's own account. If domestic travel is required, such travel may be authorised if evidence of importance is provided. Travel should not be included in the budget and SANBI will arrange travel separately in line with SANBI's policies. SANBI will host the system after system migration from the Service Provider.

8. Submission of tender

In Respect of Bids that include Functionality as a Criterion for Evaluation (Issued 3 September 2010), the two-envelope system will be used for this bid. Service providers are to submit (1) printed document pack with pricing included in an envelope marked 'ORIGINAL', and in a separate envelope (marked 'COPY') provide a copy of the document pack without pricing as PDF file(s) on a memory stick.

NB: Financial or pricing details should ONLY be included in the printed document pack marked 'ORIGINAL', and not in the PDF file(s) of the document(s) on the memory stick.

NB: Failure to submit one printed document pack with pricing in one envelope, and a document pack without pricing on a memory stick will lead to your bid being disqualified.

Tenders must 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. Emailed and faxed submissions will not be accepted. Late submissions will be disqualified.

Closing date and time: 06 October 2023 at 11:00

9. Evaluation criteria

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

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

CRITERIA FOR EVALUATING FUNCTIONALITY		WEIGHT / POINTS	
Technical merit of proposal			
A full description, of no more than ten (10) pages, that highlights the approach of how the service provider will meet the requirements of the ToR in terms of the design and implementation of the system. This should include a project plan with timeframes.		15	50
Sub-criteria	Points		
Description does not detail how items listed in the terms of scope of work will be delivered	0		
Description details 1 – 2 of the items listed in the scope of work to be delivered	4		

CRITERIA FOR EVALUATING FUNCTIONALITY		WEIGHT / POINTS											
Description details of the 3 – 4 of the items in the scope of work to be delivered	8												
Description details 5 - 6 of the items in the scope of work to be delivered	10												
Description details 6 - 8 of the items in the scope of work to be delivered	15												
• An approach to training of staff and skills transfer		5	20										
• A description of the management of the maintenance and support over the three-year period		10											
System and technical requirements													
• Plan and approach to the information security of the system		10											
• Plan and approach to achieving the technical and system requirements		10											
Past experience and overall track record		10	20										
• Quality of references for four (4) relevant current or recent clients, within the last five years, for which similar work has been conducted. The reference letters must indicate description of service, contract period, contract value and how the Service Provider performed or delivered the services.		<table><tr><th>Sub-criteria</th><th>Points</th></tr><tr><td>No reference letter submitted</td><td>0</td></tr><tr><td>1 reference letter submitted</td><td>2</td></tr><tr><td>2 – 3 reference letters submitted</td><td>5</td></tr><tr><td>4 or more reference letters submitted</td><td>10</td></tr></table>		Sub-criteria	Points	No reference letter submitted	0	1 reference letter submitted	2	2 – 3 reference letters submitted	5	4 or more reference letters submitted	10
Sub-criteria	Points												
No reference letter submitted	0												
1 reference letter submitted	2												
2 – 3 reference letters submitted	5												
4 or more reference letters submitted	10												
• Relevance of similar projects carried out within the past five years and ability to undertake the work through reference to the scope and scale of similar work done.		10											
		<table><tr><th>Sub-criteria</th><th>Points</th></tr><tr><td>No relevant projects submitted</td><td>0</td></tr><tr><td>1 relevant project submitted</td><td>2</td></tr><tr><td>2 – 3 relevant projects submitted</td><td>5</td></tr><tr><td>4 or more relevant projects submitted</td><td>10</td></tr></table>	Sub-criteria	Points	No relevant projects submitted	0	1 relevant project submitted	2	2 – 3 relevant projects submitted	5	4 or more relevant projects submitted	10	
Sub-criteria	Points												
No relevant projects submitted	0												
1 relevant project submitted	2												
2 – 3 relevant projects submitted	5												
4 or more relevant projects submitted	10												
Team Capacity		10	30										
• Skills and experience													
<table><tr><th>Sub-criteria</th><th>Points</th></tr><tr><td>Zero years of experience</td><td>0</td></tr><tr><td>1 to 2 years of experience</td><td>3</td></tr><tr><td>3 – 5 years of experience</td><td>5</td></tr><tr><td>More than 5 years of experience</td><td>10</td></tr></table>				Sub-criteria	Points	Zero years of experience	0	1 to 2 years of experience	3	3 – 5 years of experience	5	More than 5 years of experience	10
Sub-criteria	Points												
Zero years of experience	0												
1 to 2 years of experience	3												
3 – 5 years of experience	5												
More than 5 years of experience	10												
• Comprehensive CV(s) highlighting experience and skills in project management.													
<table><tr><th>Sub-criteria</th><th>Points</th></tr><tr><td>Zero years of experience</td><td>0</td></tr><tr><td>1 to 2 years of experience</td><td>3</td></tr></table>		Sub-criteria	Points	Zero years of experience	0	1 to 2 years of experience	3						
Sub-criteria	Points												
Zero years of experience	0												
1 to 2 years of experience	3												

CRITERIA FOR EVALUATING FUNCTIONALITY		WEIGHT / POINTS	
3 – 5 years of experience	5		
More than 5 years of experience	10		
Comprehensive CV(s) highlighting experience and skills in implementing membership management systems.		10	
Sub-criteria	Points		
Zero years of experience	0		
1 to 2 years of experience	3		
3 – 5 years of experience	5		
More than 5 years of experience	10		
Comprehensive CV(s) highlighting experience and skills in conducting technical and end user training.		10	
Sub-criteria	Points		
Zero years of experience	0		
1 to 2 years of experience	3		
3 – 5 years of experience	5		
More than 5 years of experience	10		
			100

Bids that fail to score a minimum of 70 points out of a possible 100 points for functionality will not be eligible for further consideration.

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, 2022 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 specific goals, Central Suppliers Database (CSD) report will be utilised to verify specific points claimed.

Sufficient information must be provided to allow the evaluation panel to evaluate proposals against these criteria.

10. Contract period

The duration of the contract shall be for a maximum period of three years with the first six (6) months for the design and implementation of the system and the remaining contract period will focus on maintenance and support of the system.

ANNEXURE B

PRICING SCHEDULE

DESCRIPTION	AMOUNT YEAR 1 INCL VAT	AMOUNT YEAR 2 INCL VAT	AMOUNT YEAR 3 INCL VAT	TOTAL AMOUNT FOR 3 YEARS INCLUSIVE VAT
Maintenance and support for the duration of the contract	R	R	R	R
Price per user for additional training	R	R	R	R
Annual Software licensing Price per licence (ad hoc)	R	R	R	R
Project management	R	R	R	R
Hosting Costs	R	R	R	R
TOTAL FIXED AMOUNT INCLUSIVE OF VAT				R

DESCRIPTION	BILLING CYCLE	TOTAL ONCE OFF INCLUSIVE OF VAT
Planning and design of the membership management system including its customisation for SANBI	Once off	R
Implementation of the membership management system including:		
• Configuration and setup of the system	Once-off	R
• Testing of the system	Once-off	R
• Training of users and provision of user manuals and other material	Once off	R
Total for once off payments		R
Total for annual costs (Year 1, 2 and 3)		R
TOTAL COST OF CONTRACT		R