



ELUNDINI LOCAL MUNICIPALITY

Tender Notice and Invitation to Tender

Framework contract for the following services of the Mount Fletcher Infrastructure Programme:

Framework Contract Name	Tender No.
Project and Contract Management Services	ELM-3/002/2017-2018
Health and Safety Services	ELM-3/003/2017-2018

Elundini Local Municipality invites tenders for professional project and contract management, health and safety services, quantity surveyor/cost controller tenders for the Mount Fletcher infrastructure programme over a 3 year term without a guarantee of the quantum of work.

The contracts will be based on the NEC3 Professional Service Contract.

Only tenderers who have suitable experience and suitably qualified personnel in providing similar services to those that are required are eligible to submit tenders.

Tender Data, List of Returnable Documents, Evaluation Criteria and Description of the services will be downloaded from Elundini Local Municipality Website: www.elundini.gov.za and obtainable from our offices on **Friday, 07 July 2017**.

Tender Documents will be available from SCM on Wednesday, **12 July 2017** upon payment of a **non-refundable** cash fee of **R250.00** for each document made payable to the Elundini Local Municipality.

A compulsory clarification meeting with representative of the Employer will take place at **Mount Fletcher Town Hall** on **Friday, 14 July 2017** starting at **11H00** and end at **12H00**.

The closing time for receipt of tenders is on **Thursday, 10 August 2017**. Telegraphic, telephonic, telex, facsimile, e-mail and late tenders will not be accepted.

Tenders may only be submitted on the tender documentation that is issued.

Requirements for sealing, addressing, delivery, opening and assessment of tenders are stated in the Tender Data.

Queries relating to the issue of these documents may be addressed in writing to **Mr P. Mpendulo** at **email: piwem@elundini.gov.za**

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K. GASHI
MUNICIPAL MANGER



Elundini Local Municipality

Erratum

This serves to notify of the changes in the advert that was on paper Friday, 07 July 2017

Please note that the following service is cancelled from this Framework contract of the Mount_Fletcher Infrastructure Programme:

Framework Contract Name	Tender No.	Tender Status
Quantity Surveyor/Cost Controller Tenders	ELM-3/004/2017-2018	Cancelled

Please note that the closing time for ELM-3/002/2017-2018 and ELM-3/003/2017-2018 is at 12H00

We sincerely apologize for any inconvenience that this may have caused.

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K. Gashi
MUNICIPAL MAMNGER



Elundini Local Municipality

Tender No: ELM-3/002/2017-2018

Framework contract for project and contract management services for the Mount Fletcher infrastructure programme

T1.2 Tender Data

The conditions of tender are the latest edition of SANS 10845-3, *Standard conditions of tender*.

SANS 10845-3 makes several references to the Tender Data for details that apply specifically to this tender. The Tender Data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the provisions of SANS 10845-3.

Each item of data given below is cross-referenced to the clause in SANS 10845-3 to which it mainly applies.

Clause number	Tender Data
3.1	The Employer is Elundini Local Municipality
3.2	The documents issued by the Employer comprise the documents listed on the contents page
3.4	The employer's agent is : Name: Mr Piwe Mpendulo Tel: 045 932 8131 E-mail: piwe@elundini.gov.za
3.4	The language for communications is English

4.1	<p>Only those tenderers who satisfy the following eligibility criteria and who provide the required evidence in their tender submissions are eligible to submit tenders and have their tenders evaluated:</p> <ol style="list-style-type: none"> 1. The tenderer: <ol style="list-style-type: none"> a) is not an unincorporated joint venture; and b) is registered in terms of the Companies Act, 2008 (Act 71 of 2008) or Close Corporation Act, 1984, (Act No. 69 of 1984) or, if a partnership, has in place a partnership agreement that enables the partnership to automatically continue to function in the event of a death or withdrawal of one of the partners; 2. The tenderer has in its full time employ a Principal Consultant (<i>key person</i>) (i.e. the person who will provide the service or under whose active and personal direction, control and supervision the service is to be provided) who is registered as a professional engineer or professional engineering technologist in terms of the Engineering Profession Act or a professional construction manager registered in terms of the Project and Construction Management Profession Act and who has experience in providing similar services to those described in the scope of work. 3. The tendering entity has professional indemnity insurance cover issued by a reputable insurer in an amount of not less than R 3,0 million in respect of a claim without limit to the number of claims. 4. The tendering entity <ol style="list-style-type: none"> a) is a firm which is a member of Consulting Engineers South Africa; or b) has at least 50 % of its directors, members or partners as relevant, who are professionally registered as one of the following: <table border="1" data-bbox="288 1021 1437 1312"> <thead> <tr> <th data-bbox="288 1021 810 1104">Category of registration</th> <th data-bbox="810 1021 1437 1104">Act</th> </tr> </thead> <tbody> <tr> <td data-bbox="288 1104 810 1173">Professional engineer or professional engineering technologist ; or</td> <td data-bbox="810 1104 1437 1173">Engineering Profession Act</td> </tr> <tr> <td data-bbox="288 1173 810 1243">Professional construction project manager or professional construction manager</td> <td data-bbox="810 1173 1437 1243">Project and Construction Management Profession Act</td> </tr> <tr> <td data-bbox="288 1243 810 1312">Professional quantity surveyor</td> <td data-bbox="810 1243 1437 1312">Quantity Surveying Profession</td> </tr> </tbody> </table> 5. The tenderer is able to provide financial statements complying with applicable legislation for the preceding financial year within 12 months of the year end. 6. The tenderer (tendering entity) has a turnover over during its preceding financial year which is not less than R 1,0 million. 7. The tenderer can provide at least three contactable client references for the provision of project and contract management services to such clients which generated a fee income of at least R 0,5 million including VAT and which has been satisfactorily completed during the last five years. 	Category of registration	Act	Professional engineer or professional engineering technologist ; or	Engineering Profession Act	Professional construction project manager or professional construction manager	Project and Construction Management Profession Act	Professional quantity surveyor	Quantity Surveying Profession
Category of registration	Act								
Professional engineer or professional engineering technologist ; or	Engineering Profession Act								
Professional construction project manager or professional construction manager	Project and Construction Management Profession Act								
Professional quantity surveyor	Quantity Surveying Profession								
4.7	<p>The arrangements for a compulsory clarification meeting are as stated in the Tender Notice and Invitation to Tender which are as follows:</p> <p>Date: Friday, 14 July 2017 Place: Mount Fletcher Town Hall Time: Start at 11H00 end at 12H00</p> <p>Tenderers must sign the attendance list in the name of the tendering entity. Addenda will be issued to and tenders will be received only from those tendering entities appearing on the attendance list.</p>								
4.12	No alternative tender offers will be considered								
4.13.1	Parts of each tender offer communicated on paper shall be submitted as an original, plus one copies.								

<p>4.13.5 4.15</p>	<p>The employer's details and address for delivery of tender offers and identification details that are to be shown on each tender offer package are:</p> <p>Location of tender box: Elundini Municipality Cashier's reception area Finance Department</p> <p>Physical address: 1 Seller Street Maclear 5480</p> <p>Identification details: Tender no, Title of Tender and the closing date and time for tenders</p> <p>Closing Date: Thursday, 10 August 2017 at 12H00</p> <p>The tender box is only open on weekdays between 08:00 and 16:00</p>
<p>4.13.4</p>	<p>The tenderer is required to submit with his tender the following certificates:</p> <ol style="list-style-type: none"> 1) registration report from the National Treasury Central Supplier Database. 2) a copy of the tenderer's professional indemnity insurance; 3) a copy of the professional registration certificate(s) for the Principal Consultant (<i>key person</i>)
<p>4.13.5</p>	<p>The "ORIGINAL" and "COPY" are to be submitted as separate packages.</p>
<p>4.13.6</p>	<p>Telephonic, telegraphic, telex, facsimile or e-mailed tender offers will not be accepted.</p>
<p>4.15</p>	<p>The closing time for submission of tender offers is as stated in the Tender Notice and Invitation to Tender.</p>
<p>4.16</p>	<p>The tender offer validity period is 8 weeks.</p>
<p>5.4</p>	<p>Tenders will be opened immediately after the closing time for tenders stated in the Tender Notice and Invitation to Tender.</p>
<p>5.11.1</p>	<p>The financial offer will be reduced to a comparative basis using the Tender Assessment Schedule.</p>
<p>5.11.5</p>	<p>The procedure for the evaluation of responsive tenders is Method 4 (Financial offer, quality and preference) The total number of tender evaluation points (T_{EV}) shall be determined in accordance with the following formula.</p> $T_{EV} = f_1 (N_{FO} + N_P) + f_2 N_Q$ <p>where f_1 and f_2 are fractions, f_1 equals 1 minus f_2 and f_2 equals 0,5</p> <p>N_{FO} is the number of tender evaluation points awarded for the financial offer made in accordance with 5.11.7 where the score for financial offer is calculated using the following formula</p> $A = (1 - \frac{(P - P_m)}{P_m})$ <p>and W_1 equals 80.</p> <p>N_P is the number of tender evaluation points awarded for preferences claimed in accordance with the Preferencing Schedule</p> <p>N_Q is the number of tender evaluation points awarded for quality offered in accordance with 5.11.9 where $W_2 = 100$.</p> <p>Up to 100 minus W_1 tender evaluation points will be awarded to tenderers who complete the preferencing schedule and who are found to be eligible for the preference claimed.</p>

5.11.9	<p>The quality criteria and maximum score in respect of each of the criteria are as follows:</p> <table border="1" data-bbox="338 255 1396 595"> <thead> <tr> <th data-bbox="338 255 823 349">Quality criteria</th> <th data-bbox="823 255 1222 349">Sub criteria</th> <th data-bbox="1222 255 1396 349">Maximum number of points</th> </tr> </thead> <tbody> <tr> <td data-bbox="338 349 823 479" rowspan="2">Experience of Principal Consultant (<i>key person</i>)(Schedule 1)</td> <td data-bbox="823 349 1222 416">Professional profile in relation to the required service</td> <td data-bbox="1222 349 1396 416">25</td> </tr> <tr> <td data-bbox="823 416 1222 479">Experience in relation to the required service</td> <td data-bbox="1222 416 1396 479">25</td> </tr> <tr> <td colspan="2" data-bbox="338 479 1222 517">Value add (see Schedule 2)</td> <td data-bbox="1222 479 1396 517">20</td> </tr> <tr> <td colspan="2" data-bbox="338 517 1222 555">Approach paper (schedule 3)</td> <td data-bbox="1222 517 1396 555">30</td> </tr> <tr> <td colspan="2" data-bbox="338 555 1222 595">Maximum possible score for quality (M_s)</td> <td data-bbox="1222 555 1396 595">100</td> </tr> </tbody> </table> <p>Quality shall be scored by not less than three evaluators in accordance with the abovementioned schedules:</p> <p>The minimum number of evaluation points for quality is 60</p>	Quality criteria	Sub criteria	Maximum number of points	Experience of Principal Consultant (<i>key person</i>)(Schedule 1)	Professional profile in relation to the required service	25	Experience in relation to the required service	25	Value add (see Schedule 2)		20	Approach paper (schedule 3)		30	Maximum possible score for quality (M_s)		100
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5.11.9	<p>Each evaluation criteria will be assessed in terms of five indicators – no response, poor, satisfactory, good and very good. Scores of 0, 40, 70, 90 or 100 will be allocated to no response, poor, satisfactory, good and very good, respectively. The scores of each of the evaluators will be averaged, weighted and then totalled to obtain the final score for quality.</p>																	
5.13	<p>Tender offers will only be accepted if:</p> <ul style="list-style-type: none"> • the tenderer is registered on the Central Supplier Database (CSD) for the South African government (see https://secure.csd.gov.za/) unless it is a foreign supplier with no local registered entity • the tenderer provides written proof from SARS that the tenderer either has no tax obligations or has made arrangements to meet outstanding tax obligations; • the financial offer is market related (see Regulations 6(9) and 7(9) of the 8(9) of the Preferential Procurement Regulations 2017): • the tenderer or any of its directors/shareholders is not listed on the Register of Tender Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 as a person prohibited from doing business with the public sector; • the tenderer has not: <ul style="list-style-type: none"> i) abused the Employer’s Supply Chain Management System; or ii) failed to perform on any previous contract and has been given a written notice to this effect; and • the tenderer has completed the Compulsory Declaration and there are no conflicts of interest which may impact on the tenderer’s ability to perform the contract in the best interests of the employer or potentially compromise the tender process. 																	
5.17	<p>The number of paper copies of the signed contract to be provided by the employer is one.</p>																	



Elundini Local Municipality

Tender No : ELM-3/002/2017-2018

Framework contract for project and contract management services for the Mount Fletcher infrastructure programme

T.2.1 List of returnable documents

1 Documentation to demonstrate eligibility to have tenders evaluated

- Practice Declaration including all the associated supporting documentation listed in such the declaration
- Annual Financial Statements Declaration

Note: Failure to provide these documents will result in the tender not being evaluated

The Tenderer's attention is drawn to the eligibility criteria which require the tenderer to provide the required evidence in their tender submissions in order to be eligible to have their tenders evaluated.
Tenderers who fail to provide the required documentation will not have their tenders evaluated.

2 Returnable Schedules required for tender evaluation purposes

The tenderer must complete the following returnable schedules as relevant:

- Record of Addenda to Tender Documents
- Proposed amendments and qualifications
- Compulsory Declaration
- Municipal Declaration
- Preferencing Schedule: Broad Based Black Economic Empowerment Status
- Evaluation Schedule 1: Principal Consultant (*key person*)
- Evaluation Schedule 2: Value added by Tenderer
- Evaluation Schedule 3: Approach paper

The Tenderer's attention is drawn to the eligibility criteria which require the tenderer to provide the required evidence in their tender submissions in order to be eligible to have their tenders evaluated.

Tenderers who fail to provide the

Note: The tenderer is required to insert a tax compliance pin number in the Compulsory Declaration so that the tenderer's tax compliance status can be confirmed.

3 Other documents required for tender evaluation purposes

The tenderer must provide the following returnable documents:

- B-BBEE Verification Certificates issued by a verification agency accredited by the South African National Accreditation System (SANAS) or, in the case of an Exempted Micro Enterprise or a Qualifying Small Enterprise, a duly completed sworn affidavit on the relevant form obtained from the DTI website (https://www.thedti.gov.za/economic_empowerment/bee_codes.jsp)
- Suitable annual financial statements for the preceding financial year within 12 months of the financial year end
- National Treasury Central Supplier Database (CSD) Registration Report
- A copy of the professional registration certificate(s) for the Principal Consultant (*key person*)
- A copy of the tenderer's professional indemnity insurance

Evaluation Schedule 1 : Experience of Principal (key person) Consultant

The experience of the Principal Consultant (Key Consultant whose name is stated as such in Part 2 of the Contract Data) will be evaluated i.e. the person who will provide the service or under whose active and personal direction, control and supervision the service is to be provided (see scope of work).

This will be undertaken in relation to:

- 1) Professional profile: professional qualifications, professional experience (total duration of professional activity), level of education and training and positions held which have a bearing on the services which may be required.
- 2) Experience in relation to the services which may be required in terms of the scope of work

A CV of the Principal Consultant of **not** more than 4 pages must be attached to this schedule. Each CV should be structured under the following headings:

- 1 Personal particulars
 - name
 - date and place of birth
 - place (s) of tertiary education and dates associated therewith
- 2 Qualifications (degrees, diplomas, grades of membership of professional societies and professional registrations)
- 3 Name of current employer and position in enterprise
- 4 Overview of post graduate experience (year, organization and position / responsibilities)
- 5 Outline of assignments / experience that has a bearing on the required services giving dates, nature and scope of similar services that have been undertaken including the level of responsibility
- 6 Professional activities which have a bearing on the service

Certificates / suitable proof of membership must be attached to this schedule

The scoring will be as follows:

Rating / score	General experience and qualifications in relation to the service	Experience in relation to the service
0	Tenderer has submitted no information or inadequate information to determine scoring level or does not have an appropriate professional profile or experience.	
Poor (score 40)	Principal Consultant has a limited professional profile	Principal Consultant has limited levels of experience which relates to the proposed scope of work
Satisfactory (score 70)	Principal Consultant has reasonable professional profile	Principal Consultant has reasonable levels of experience which relates to the proposed scope of work
Good (score 90)	Principal Consultant has an extensive professional profile	Principal Consultant has extensive levels of experience which relates to the proposed scope of work
Very good (score 100)	Principal Consultant has outstanding professional profile	Principal Consultant has outstanding levels of experience which relates to the proposed scope of work

Evaluation Schedule 2: Value add by tenderer

The value added by the tenderer in delivering the service will be evaluated i.e. the answer to the question as to why the Employer will derive better value for money by contracting with the tenderer and making use of the Principal Consultant that is offered for the proposed service rather than with any other tenderer and their offered Principal Consultant.

Examples of value add may include:

- institutional memory which can be used to underpin the service;
- availability to engage with the Employer on specific issues
- office in the vicinity where the works are required
- insights gained from previous work of a similar nature;
- approaches to the proposed service and the countering of perceived risks;
- access to specialist expertise;
- internal quality control systems;
- previous or current work related to the required service;
- depth of in-house expertise apart from that residing in the Principal Consultant;
- networks of expertise which can be tapped into;
- local and international access to information / knowledge relating to the required and related services
- access to internet or library access to specialist literature or internal libraries and facilities
- software packages, proprietary products, equipment etc

The tenderer should specifically outline the value add with respect to the entity's portfolio of work and past experience in the field of project and contract management with particular reference to municipal infrastructure.

The tenderer must briefly outline the value add offered in not more than six pages and attach this to this page. The tenderer should also state what value add other staff members will provide to the service and refrain from submitting generic company literature.

The scoring of the tenderer's value added will be as follows:

0	Tenderer has submitted no information or inadequate information to determine scoring level.
Poor (score 40)	Tenderer offers limited value add to the required service
Satisfactory (score 70)	Tenderer offers attractive value add to the required service
Good (score 90)	Tenderer offers very desirable value add to the required service
Very good (score 100)	Tenderer offers exceptional value add to the service required.

Evaluation Schedule 3: Approach paper to the management of the project

The approach paper must outline the tenderer's proposed approach to providing the required services contemplated in the scope of work and outline the proposed approach / methodology to providing the service. The approach paper should articulate what value add the tenderer will provide in achieving the stated and implied objectives for the service.

The tenderer must as such explain his / her understanding of the objectives of the service and the Employer's stated and implied requirements, highlight the issues of importance, and explain the approach they would adopt to address them. The approach paper should explain the methodologies which are to be adopted, demonstrate the compatibility of those methodologies with the proposed approach. The approach should also indicate how risks will be managed..

The tenderer must attach his / her approach paper to this page. The approach paper should not be longer than 6 pages.

The scoring of the approach paper will be as follows:

	Technical approach and methodology
Score 0	Tenderer has submitted insufficient information to score the schedule
Poor (score 40)	The technical approach and / or methodology is poor / is unlikely to satisfy project objectives or requirements. The approach lacks strategic thinking / expertise and does not deal with the critical aspects of integration.
Satisfactory (score 70)	The approach, although likely to satisfy objectives is generic and not tailored to address the specific project. The approach does not adequately deal with the critical characteristics of the project.
Good (score 90)	The approach is specifically tailored to address the specific project objectives and methodology and is sufficiently flexible to accommodate changes that may occur during execution.
Very good (score 100)	Besides meeting the "good" rating, the important issues are approached in an innovative and efficient way, indicating that the tenderer has outstanding knowledge of state-of-the- art approaches. The approach paper details ways to improve the project outcomes and the quality of projected outputs

4 Description of the services

The services over the term of the contract include:

- 1) the management and integration of projects within the Mount Fletcher infrastructure programme from their conception to their completion in support of the Employer's objectives and aspirations;
- 2) the management of the NEC3 Engineering and Construction Contract (Option F) entered into between the successful tenderer and the Employer including the drafting and issuing of Package Orders;
- 3) the reviewing of end of stage deliverables developed in accordance with the provisions of the National Treasury Standard for Infrastructure Procurement and Delivery Management and advising the Employer on their acceptability;
- 4) the gathering of data and the drafting of reports required by the Office of the Premier, the Elundini Local Municipality and Others including progress reports on initiatives to attain secondary procurement objectives;
- 5) the management of the schedule for the programme and cash flows including the setting of control budgets and financial reporting.
- 6) the provision as necessary of suitably qualified personnel who can undertake construction monitoring duties;
- 7) the management of documents associated with the programme; and
- 8) the management of the development of subcontract documents and the procurement process from the advertisement of tenders to the award of the subcontracts

4 Description of the services

The services over the term of the contract include:

- 9) the management and integration of projects within the Mount Fletcher infrastructure programme from their conception to their completion in support of the Employer's objectives and aspirations;
- 10) the management of the NEC3 Engineering and Construction Contract (Option F) entered into between the successful tenderer and the Employer including the drafting and issuing of Package Orders;
- 11) the reviewing of end of stage deliverables developed in accordance with the provisions of the National Treasury Standard for Infrastructure Procurement and Delivery Management and advising the Employer on their acceptability;

- 12) the gathering of data and the drafting of reports required by the Office of the Premier, the Elundini Local Municipality and Others including progress reports on initiatives to attain secondary procurement objectives;
- 13) the management of the schedule for the programme and cash flows including the setting of control budgets and financial reporting.
- 14) the provision as necessary of suitably qualified personnel who can undertake construction monitoring duties;
- 15) the management of documents associated with the programme; and
- 16) the management of the development of subcontract documents and the procurement process from the advertisement of tenders to the award of the subcontracts