



TENDER DOCUMENT

Tender No: GCRO/2019/01

Quality of Life Survey VI (2020)

**University of the Witwatersrand, Johannesburg on behalf of Gauteng City-Region Observatory
("GCRO")**

November 2019

Issued by:

The Gauteng City-Region Observatory

Executive designation: HEAD: GCRO: Dr Robin Moore

Table of Contents	
Number	Heading
THE TENDER	
Part T1: Tendering procedures	
T1.1	Tender notice and invitation to tender
T1.2	Tender data
Part T2: Returnable documents	
T2.1	List of returnable schedules Schedule A: Company Profile and Information Schedule B: Preference Documents Schedule C: Customer References and Experience of Tenderer Schedule D: Compliance Schedule Schedule E: Project Proposal Schedule F: Curriculum Vitas (CVs) Schedule G: Data access and CAPI system Schedule H: Fieldworker employment, training and management Schedule I: Case Study
T2.2	Returnable schedules are indicated above
THE CONTRACT	
Part C1: Agreement	
C1.1 Type of Agreement – Project Agreement	
Part C2: Annexures	
C2.1	Annexure 1: Scope of Work Annexure 2: Pricing Schedule

T1.1 Tender Notice and Invitation to Tender

Overview of the GCRO

The Gauteng City-Region Observatory (“GCRO”) was established in 2008 as a partnership between the University of Johannesburg, the University of the Witwatersrand, Johannesburg and the Gauteng Provincial Government (“GPG”), with local government in Gauteng (“SALGA-Gauteng”) also represented on the GCRO Board. GCRO receives a core grant from the GPG, and the two universities provide significant in-kind support. While the GCRO is based at the two universities, it is also charged with extending links to all the higher education institutions, as well as knowledge councils, private sector think-tanks, research NGOs and information-exchange and learning-networks operating in the city-region.

Behind the motivation for setting up the GCRO is a vision for a fast growing and dynamic urban region, that through better planning and management, and in particular improved co-operative government relations between the spheres and sections of government responsible for its parts, will become more functionally integrated, spatially coherent, economically competitive, creative, innovative, environmentally sustainable and socially inclusive.

Invitation to Tender

The GCRO, in collaboration with University of the Witwatersrand, Johannesburg (the “University”) invites proposals for the Quality of Life VI (2020) Survey. Deliverables will include questionnaire digitisation, final piloting, managing and conducting approximately 13500 household interviews, quality control, data management, the provision of specified process-related reports, and preparation of a clean dataset in relation to the Quality of Life VI (2020) Survey. Tenderers must at least have experience in completing household survey with a minimum sample of 6000.

Important Information:

- Compulsory clarification meeting/session/briefing on **Thursday, 21 November 2019** strictly at **10h00**.
- Tender submission delivery address and the meeting point to the clarification venue is at the offices of Procurement Services, Facilities and Services Building, West Campus, Braamfontein, University of the Witwatersrand, Johannesburg. **Meeting time for clarification is at 09h50**, tel. (011) 717 1510) Refer: <https://www.wits.ac.za/about-wits/tenders/> for Directions to Procurement. Doors will be closed at 10h15.

- Documents must be downloaded from website cited below prior to attending the compulsory clarity session in order to understand the scope and the requirements. Website: <https://www.wits.ac.za/about-wits/tenders/> documents can be downloaded from 14h00 on Monday, 11 November 2019.
- Please ensure that you confirm your eligibility to tender prior to the briefing session, by reviewing the criteria stated in the tender documents.
- Queries relating to this RFP can be addressed via e-mail to: Mr Bonolo Mpshe, e-mail: bonolo.mpshe@Wits.ac.za and admin.tenders@wits.ac.za
- The closing date and time for receipt is **Thursday, 12 December 2019 at 12h00**. Address for tender delivery is stated above. No late submissions will be accepted.
- Shortlisted tenderers may be given the opportunity to make presentations to GCRO and will be advised of the date and time.
- The University acting on behalf of GCRO reserves its right to proceed with this request for Proposal in full, in parts or not at all and call for a new RFP in the event of an unsatisfactory reply to this RFP invitation.
- The conditions of tender, tender instructions, detail regarding the compulsory briefing meeting and detail regarding the shortlisted tender presentations are stated in the Tender Data of the Tender Invitation Documents.

Intent to Bid

Note: Prior to the submission of any of the below listed Returnable documents and schedules in the Tender Data, the Tenderer must submit to contact person (whose details are in F.1.4 below, in a single email, the following by the time indicated in F.2.15 of the Tender Data below:

- The Tenderer's written statement of intention to offer to tender by the **15 November 2019**
This is to enable logistics

Eligibility Criteria

Only those Tenderers who satisfy the following eligibility criteria and who provide the required evidence in their proposal submission are eligible to submit tenders and have their tenders evaluated. The Tenderer should only submit a Tender Offer if the following essential eligibility criteria are met. Failure to do so will result in disqualification.

It is **compulsory** that the Tenderer:

- is a registered South African entity
- submits proof of company registration
- submits a signed submission by an authorised employee of the company
- submits required information as indicated in Section T2: Returnable documents
- provides a current and valid Tax clearance certificate and tax compliance status PIN/Document
- provides audited company financial statements for the past 3 (three) years
- provides a Letter of Good Standing from its bankers (see Returnable Schedules below)
- submit an organisational profile, providing an overview of organisational background, experience and staffing to be provided in Schedule A

- submit a project proposal, providing an overview of how the tenderer would approach this project, to be provided in Schedule E
- provide at minimum one reference where the tenderer has conducted a face-to-face CAPI (Computer assisted personal interview) household survey with a sample size of 6000 or more. Reference letters and contact information to be provided in Schedule C.
- submit two additional reference letters for face-to-face household survey work completed in the past 5 (five) years, with contact information for each reference, to be provided in Schedule C
- must provide a case study for a completed CAPI assisted household survey with a sample size of a minimum 6000. It is to your advantage if the case study is related to a similar scope of work as listed in this tender (size, scale, complexity). This is to be provided in Schedule I
- submit CV for dedicated senior project manager to be provided in Schedule F
- submit CVs for all managerial staff identified in the proposal to be provided in Schedule F
- must fully comply with all mandatory criteria as listed in Schedule D Compliance Schedule

The University acting on behalf of GCRO, reserves the right to request additional information (to be responded to within a particular timeframe) related to these items above if insufficient information is provided

TENDERERS to ensure that all points above are addressed and referenced in the **Schedule D**. List each criteria in your response and detail how you comply with the respective criteria.



Gauteng
City-Region
Observatory

The GCRO, in collaboration University of the Witwatersrand, Johannesburg on behalf of GCRO

Tender No: GCRO/2019/01

Quality of Life Survey VI (2020)

T1.2 Tender Data

Standard Conditions of Tender

The standard conditions of tender are the Standard Conditions of Tender as contained in Annex F of the CIDB Standard for Uniformity in Construction Procurement (July 2015).

(See: <http://www.cidb.org.za/publications/Documents/Standard%20for%20Uniformity%20in%20Construction%20Procurement%20-%20July%202015.pdf>).

The Standard Conditions of Tender make several references to the Tender Data for details that apply specifically to this tender. These Tender Data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the Standard Conditions of Tender.

Each item of data given below is cross-referenced to the clause in the Standard Conditions of Tender to which it mainly applies.

Clause number	Tender Data
F.1.1	Each occurrence of the “employer” is replaced with the “University”. The “University” is the University of the Witwatersrand, Johannesburg, acting on behalf of GCRO. The “employer” and the “University” have the same meaning and are interchangeably used throughout this tender invitation.
F.1.2	The Tender Documents issued by the University acting on behalf of GCRO comprise the documents listed in the above Table of Contents.
F.1.2	All tender offers and any accompanying documentation become the property of the University and will not be returned.
F.1.3.2	Orders: The Tenderer, if awarded the contract, will only supply to the University when an official University order (with official order no) has been sent by the University. Such order received by the Tenderer should be acknowledged in writing without delay.
F.1.4	The contact person(s) for this tender is: Name: The Category Manager, Procurement Services, Bonolo Mpshe Email: bonolo.mpshe@wits.ac.za and admin.tenders@wits.ac.za
F.1.5.1	This provision applies equally to the University acting on behalf of GCRO. In addition, the University reserves the right at any time to: <ul style="list-style-type: none">request further information should the tender offer yield insufficient detail and Tenderer differentiation,

	<ul style="list-style-type: none"> • contact any Tenderer during the evaluation process, in order to clarify any information, without informing any other Tenderer, • award portions of the tender to more than one service provider, • award this tender in full, in parts or not at all and call for new tenders in the event of unsatisfactory reply to this tender invitation, • cancel, withdraw, defer, suspend or reissue the tender in whole or in part at any time, • share all information and findings with any other higher education entities worldwide, provided such information has not been marked as confidential, for benchmarking purposes, and • audit the awarded contract/s from time to time. 		
F.1.5.2	This clause does not apply.		
F.1.6.1	This clause does not apply.		
F.1.6.2	This clause does not apply.		
F.1.6.3	This clause does not apply		
F.2.1	Only those tenderers who satisfy the Eligibility Criteria set out in Tender Notice and Invitation to Tender above are eligible to submit tenders.		
F.2.7	Compulsory clarification meetings will be held at the times and places set out in F.2.15. Tenderers must sign the attendance list in the name of the tendering entity at the meeting.		
F.2.11	An item against which no rate or price is entered by the Tenderer shall be considered to be covered by other rates or prices detailed in the tender offer.		
F.2.13.2	All documents submitted by the Tenderer must be compiled in the order (and corresponding to the headings) set out in the Table of Contents above and all pages numbered within each section. Failure to comply with this requirement may disqualify the Tenderer.		
F.2.13.3	The Tenderer must submit 2 (two) original printed copies of their tender offer together with an electronic copy on a USB to the address set out in F.2.15. The printed copies and the electronic copy on a USB must contain exactly the same information.		
F.2.13.4	<p>An officer or director of the Tenderer who is legally authorised by the Tenderer to enter into a binding agreement must sign the tender offer. A list of the person(s) authorised to negotiate on the Tenderer's behalf must be submitted with the tender offer.</p> <p>The Tenderer will nominate one representative to act as its single point of contact for all dealings with the University acting on behalf of the GCRO.</p>		
F.2.13.5	<p>The University's details and address for delivery of tender offers and identification details that are to be shown on each tender offer package are:</p> <table border="1" data-bbox="359 1910 1423 2002"> <tr> <td>Identification details:</td> <td>Tender reference number, Title of Tender and the closing date and time of the tender</td> </tr> </table>	Identification details:	Tender reference number, Title of Tender and the closing date and time of the tender
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	Tender Box Location:	Foyer of the Procurement Services Offices (Attention: Charmaine Layton)																																										
	Physical address:	Procurement Services, Facilities and Services Building, West Campus, Braamfontein, University of the Witwatersrand, Johannesburg (Tel 011-717-1510) Refer maps at: https://www.wits.ac.za/maps/braamfontein-campus-west/ and https://www.wits.ac.za/media/wits-university/footer/about-wits/procurement/Directions%20-%20Wits%20Procurement%20Department%20v2.1.pdf																																										
F.2.13.9	Telephonic, facsimile or e-mailed tender offers will not be accepted.																																											
F.2.15	<p>The closing time for receipt of tender offers is 12:00 hrs on 12 December 2019. (Tender Offers submitted after this time will <u>NOT BE ACCEPTED</u>)</p> <table border="1"> <thead> <tr> <th></th> <th>Date</th> <th>Time</th> <th>Venue / Site</th> </tr> </thead> <tbody> <tr> <td>Invitation to Tender notice release</td> <td>11/11/2019</td> <td>14h00</td> <td></td> </tr> <tr> <td>Tenderer's notice of intent to respond & make an offer</td> <td>15/11/2019</td> <td>12h00</td> <td></td> </tr> <tr> <td>Tenderer's compulsory clarification meeting</td> <td>21/11/2019</td> <td>10h00</td> <td></td> </tr> <tr> <td>Tenderer's compulsory visits to University site/s</td> <td>N/A</td> <td>N/A</td> <td></td> </tr> <tr> <td>University's optional visits to Tenderers' sites</td> <td>N/A</td> <td>N/A</td> <td></td> </tr> <tr> <td>Tenderer's Offer submission (response closing time)</td> <td>12/12/2019</td> <td>12h00</td> <td></td> </tr> <tr> <td>Short-listed Tenderer's presentations¹</td> <td>30/01/2020 and 31/01/2020</td> <td>10h00</td> <td></td> </tr> <tr> <td>Intended award date</td> <td>21/02/2020</td> <td></td> <td></td> </tr> <tr> <td>Intended contract conclusion</td> <td>28/02/2020</td> <td></td> <td></td> </tr> </tbody> </table> <p>Note that the dates in this clause F.2.15 are fixed, unless the University, which reserves its right to do so, alters any of these dates at any time, as it deems necessary.</p>					Date	Time	Venue / Site	Invitation to Tender notice release	11/11/2019	14h00		Tenderer's notice of intent to respond & make an offer	15/11/2019	12h00		Tenderer's compulsory clarification meeting	21/11/2019	10h00		Tenderer's compulsory visits to University site/s	N/A	N/A		University's optional visits to Tenderers' sites	N/A	N/A		Tenderer's Offer submission (response closing time)	12/12/2019	12h00		Short-listed Tenderer's presentations ¹	30/01/2020 and 31/01/2020	10h00		Intended award date	21/02/2020			Intended contract conclusion	28/02/2020		
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F.2.16	The tender offer validity period is from the closing time specified in F.2.15 for the contract duration.																																											
F.2.22 F.2.23	All returnable documents, certificates and schedules must be current and valid and returned with the Tenderer's offer submission by the closing time indicated above.																																											
F.3.1.1	The University will respond to requests for clarification received up to 5 (five) working days before the tender closing time. Queries should be by email only to the contact																																											

	person named above. Additional information supplied to any Tenderer may be provided to other Tenderers via e-mail.
F.3.2	The University may issue addenda until 3 (three) working days before the tender closing time.
F.3.3	Tender offers submitted after the closing time in F.2.15 will be rejected, including any tender submission that is received by any staff member of the University after the closing time, in which event it will remain unopened (unless already open, or it is necessary to open to obtain Tenderer details) and should be retrieved by the Tenderer within 7 days of the closing time, failing which it will be destroyed.
F.3.4	Submissions are opened in the presence of the University Procurement persons and GCRO's tender evaluation committee members only.
F.3.8	<p>Tenderers will be disqualified without the opportunity to make their tender offer responsive if:</p> <ul style="list-style-type: none"> • it is submitted after the closing time specified in F.2.15, • it is delivered to individuals other than Procurement personnel at the address in F.2.13.5, • it is not submitted in duplicate and/or does not include a softcopy, • it is not signed by an authorised signatory as required in F.2.13.4, • the pricing schedule (or equivalent) in Annexure 2 of Part C2 is omitted or is not contained in the given format of or in the spread-sheets provided, • proof of indicated insurance policies and their values are not provided, • the compulsory Returnable documents and schedules are not provided or not completed in full, • they fail to comply with the requested specifications, services and service levels, or • any compulsory requirements as indicated are not complied with. <p>A tender offer may be declared unresponsive and rejected if:</p> <ul style="list-style-type: none"> • it contains any erasure, alteration, text addition or irregularity other than that as requested, • it is considered unbalanced, or does not include the required information necessary for proper comparison and evaluation, • it is incomplete or invalid documents are submitted, • it does not follow the required sequence documents and schedules listed in the Table of Contents, • it is not submitted on the forms provided or forms are not completed, • any "must" condition is not met, or • the University reasonably deems it fit to do so for any other cause.

F.3.10	The University may require short-listed Tenderers to make presentations to University management on the date and at the place in F.2.15 of the Tender Data. These are designed to give Tenderers the opportunity to present their solution and have a question and answer clarifying session.
F.3.11.2 to F.3.11.9 inclusive	<p>These clauses are replaced with the following:</p> <p>The University will apply a unique set of evaluation criteria to the tender offer including:</p> <ul style="list-style-type: none"> • tenderer experience and financial condition, reputation and competence in the provision of the goods and/or services that the Tenderer is offering to provide, • the qualification, experience and ability of the Tenderer's staff expected to be assigned to the project, • the degree to which the proposed solution addresses the University's requirements (fitness for purpose, business, technical, functionality, financial, quality, preference, etc.), including the effectiveness of implementation, and the reliability and quality of the goods and services, • the ability of the Tenderer to minimise the University's business risks in ensuring business continuity, and • additional differentiators that Tenderer shows are advantages over other similar service providers.
F.3.15	This clause does not apply.
F.3.17	Refer to clause F.2.13.2 and F.2.13.3 above
F.3.18	Notwithstanding the provisions of clause F.3.18, the University shall provide upon written request only the outcomes of tender process.

By signing below, the Tenderer agrees to be bound to all conditions, statements and terms of this tender.

Authorised Signature of Tenderer		
Name of signing person		
Capacity		
Date		
Telephone Number & Email	T:	E:
Cell Number		
Name of Tenderer [company name]		
Postal address (in block letters)		
Full street address (Domicilium citandi et executandi in the RSA)		

T.2.1 List of returnable schedules

Returnable schedules required for tender evaluation purposes

The Tenderer's offer must be composed according to, and in the sequence of the below list of required documents. The Tenderer must submit all of the following returnable schedules.

Schedule A: Company Profile and Information

- Description and brief history of Tenderer's company
- The company/organisational profile should provide an overview of organisational development, experience and staffing. The profile should:
 - demonstrate at least 5 (five) years' experience in survey work
 - demonstrate of experience in repeat cross-sectional household surveys will be particularly beneficial. Experience in surveys for academic or public sector clients, or projects requiring particularly rigorous quality control, will also be beneficial, as will experience with surveys including sensitive questions.
 - indicate experience in fielding teams of 80 or more fieldworkers on a single project will be beneficial
 - provide an overview of organisational staffing and skill sets
 - document the available cohort of fieldworkers, demonstrating an ability to field a minimum of 85, and preferably 100 fieldworkers with at least a matric, who will be employed directly by the Tenderer. Ability to field fieldworkers with experience working with the Tenderer, experience with social surveys, and coverage of all required languages will be beneficial
 - document the available cohort of fieldworker supervisors, demonstrating the ability to field 20-25 fieldworker supervisors, with a matric and relevant experience, directly employed by the Tenderer. Ability to field fieldworker supervisors with supervisory experience with the Tenderer, experience with social surveys, or who are permanent employees of the Tenderer will be beneficial
- Company financial results (including last 3 (three) financial years' audited financial results or statements prepared in accordance with International Financial Reporting Standards (IFRS) for the preceding financial year and latest integrated annual report (specific website address for report is sufficient)
- Corporate equity ownership document and shareholders' certificates
- Corporate social responsibility involvement statement
- Company and tax certificates including:

- South African registration documents if a registered company (CIPC registration and directors, VAT registration, Memorandum of Association, Certificate of Incorporation)
- A valid Tax Clearance Certificate for Tenders issued by the South African Revenue Services
- Letter of Good Standing from Tenderer's bankers which indicates the Tenderer company's financial health and liquidity. This letter must state at minimum about the Tenderer:
 - Tenderer's registered name and length of time as the bank's client,
 - The Tenderer's account name and details at the bank
 - Tenderer has successfully completed various contracts and conducted accounts at the bank,
 - Engagements and accounts with the bank have always been properly and satisfactorily conducted
 - The bank considers the Tenderer good for its normal contracting commitments, for a value of at least R 5 million
 - The Tenderer has access to lines of credit with the bank, they have the resources to meet their commitments, and that the bank considers the Tenderer a counterparty of good risk and good for business

Note: Only Tenderers that attain a minimum of **80% threshold** for functionality indicated below shall be evaluated further for Price, Preference (B-BBEE) including Presentations where required.

Functionality Criteria

Functional Compliance Schedules (Tenderer to complete relevant Annexures)

As per compliance schedule - at minimum **80%** compliance is required for service capability. Some criteria are mandatory.

No	Functionality Criteria	Weights
1.	Project Proposal incorporating all elements of the project including Information to be provided in Schedule E. Ensure all points below are addressed.	Maximum Points - 45
1.1	Approaches to questionnaire digitisation, piloting, and training of fieldworkers clearly specified, and appropriate to project purposes.	5 Points
1.2	Planning, managing and conducting fieldwork, including allocations of staffing and transport, and CAPI system.	10 Points
1.3	Strategy for in-field fieldworker management, ensuring adequate supervision, incentivisation of performance and performance oversight, and support, and ensuring the safety and well-being of fieldworkers.	5 Points
1.4	Quality control.	10 Points
1.5	Data management and reporting	5 Points
1.6	Timeline within the timeframes of the project - delivery by 19 October 2020, for a sample size of 13 500 (Project Plan)	10 Points
2.	Proven experience with conducting large-scale face-to-face CAPI household surveys: Information to be provided in Schedules A, C and I. Ensure all points below are addressed.	Maximum Points - 25

2.1	Case study demonstrates appropriate experience with implementing a large-scale face-to-face CAPI household survey. Provide information in Schedule I.	10 Points
2.2	Provide one reference demonstrating completion of a face-to-face CAPI household survey of sample size minimum 6000. Provide information in Schedule C.	5 Points
2.3	Additional references demonstrating relevant experience. Provide information in Schedule C.	5 Points
2.4	Organisational profile demonstrating relevant experience. Provide information in Schedule A.	5 Points
3.	Proven experience in the Project team: Information to be provided in Schedule F. Ensure all points below are addressed.	Maximum Points - 10
3.1	Dedicated senior level project manager with at least five years relevant survey experience, and experience in managing at least one household-level survey with sample size of 6000 or more. Experience in managing social surveys, or surveys conducted to academic standards, is beneficial.	5 Points
3.2	Dedicated capacity in the team to fulfil all other managerial roles manage and train fieldworkers, data management, CAPI, and any other role identified by the tenderer.	5 Points
4.	Data access and CAPI system. Information to be submitted and referenced as Schedule G. Ensure all points below are addressed.	Maximum Points - 10
4.1	Specification of a system, which is able to ensure GCRO back-end access to raw data as it is collected, and automated daily emails of cumulative data.	5 Points
4.2	Specification of a CAPI system able to meet project needs.	5 Points
5.	Fieldworker employment, training and management. Information to be submitted and referenced as Schedule H. Ensure all points below are addressed.	Maximum Points - 10
5.1	Capacity to field a team of at least 84 fieldworkers, and at least 20 fieldworker supervisors, working exclusively on the project and directly employed by the service provider.	5 Points
5.2	Experience in fielding a team of over 80 fieldworkers for a single project.	5 Points
	TOTAL POINTS FOR FUNCTIONALITY	100 Points

Schedule B: Preference Documents

- Valid SANAS approved BBEE certificate (Verification certificate from a verification agency accredited by SANAS and recognized as an Accredited B-BBEE Verification Agency - (see www.sanas.co.za/directory/bbee_default.php))

- Attach a written declaration on company letterhead, which has been duly signed by the Tenderer's authorised signatory, with the following content:

//we declare that the <<Tenderer >> enterprise is a Level contributor as at the closing date of this tender and our financial year ends on

Schedule C: Customer References and Experience of Tenderer

- Provide at minimum one reference, with contact information for reference, for a face-to-face CAPI (Computer assisted personal interview) household survey with a sample size of 6000 or more. Reference letters and contact information to be provided in Schedule C.
- Submit 2 (two) additional reference letters for face-to-face household survey work completed in the past 5 (five) years, with contact information for each reference, to be provided in Schedule C.
- If, in the University acting on behalf of the GCRO's opinion, the reference customers do not meet the University acting on behalf of the GCRO requirements, additional references will be requested, and visits to the reference sites may be required. Interviews at reference sites will be confidential.
- The following is a statement of similar work successfully completed by ourselves over the last 3 (three) years and more (use a separate page if necessary):

Reference company contact person and telephone number	Description of contract	Contract Value inclusive of VAT (Rand)	Has the capability and capacity to efficiently execute the project	Contract duration

Signed _____ Date _____
 Name _____ Position _____
 Tenderer _____

Schedule D: Compliance Schedule

Indicate your compliance to the criteria. It is **ESSENTIAL** that all criteria in this schedule are complied with.

Schedule E: Project Proposal (compulsory)

The project proposal must detail the overall approach the Tenderer would take to completion of the project. It should include:

- A brief overview of the proposed approach to management of the relationship with the client;
- Organogram of proposed project staffing, with all staff in managerial positions identified by name. This should include a dedicated senior project manager, and managerial staff responsible for digitisation, data management, quality control, and data finalisation.
- Specification of the number of fieldworkers who will be working on the project, with details regarding how they will be sourced and appointed, minimum qualifications and levels of experience, and languages spoken.
- A description of the CAPI system that the Tenderer proposes using for the project, together with a discussion of why this system is appropriate. The Tenderer must indicate whether the system is able to collect the 5 GPS coordinates required, and make an alternative proposal if it is not able to do so. Data management practices should be briefly described.
- A description of the back-end system that will enable GCRO, and/or its designated quality control agent, to scrutinise the raw data per interview – including GPS co-ordinates collected in-field in relation to the specified target point for the interview – during the process of data collection. A system that is able to flag incorrectly located interviews, interviews outside the parameters of typical interview length (too long or short) and conflicts between answers to specific questions, will be an advantage.
- An overview of the proposed approach to piloting and fieldworker training.
- Discussion of the proposed approach to completion of the stipulated number of successful surveys in the required time frame. This should include:
 - o Proposed approach to fieldworker supervision, management and support;
 - o How the Tenderer will ensure that interviews are completed at the correct location, and with the correctly sampled respondent;
 - o Strategies for gaining access to and working in different settlement types;
 - o Discussion of anticipated logistical requirements.
- A detailed timeline, covering timing of all major activities, from a start date of March 1, 2020, to submission of all required deliverables, based on a sample size of 13 500.

Schedule F: Curriculum Vitae (CV) (compulsory)

Include CV's for relevant personnel for this project deployment. Senior Project Manager(s) and Managerial Staff alike.

Schedule G: Data access and CAPI system and Schedule H: Fieldworker employment, training and management. Information pertaining to this is indicated in the functionality section above.

Schedule I:

The case study should provide an overview of a particular project conducted by the Tenderer, within the past 5 (five) years. The project must be a face-to-face CAPI-based household survey, with a sample size of

6 000 or more. It should detail implementation experiences, challenges encountered, strategies adopted, and lessons learned. Areas for discussion may include:

- Overall scope, scale and focus of the project;
- Approach to fieldworker training, management and oversight
- Details of the CAPI system used, a discussion of strengths and weaknesses, and an explanation for why this system is, or is not, proposed for use in QoL VI data collection.
- Experiences working in different settlement types, including response rates attained if available.
- Experiences related to relationship management with the client.

T.2.2 Returnable schedules

Returnable contract annexures that will be used for tender evaluation purposes and will be incorporated into the contract

Schedules are referred to in the returnable documents and Contract annexures.

The Tenderer's offer must be composed according to, and in the sequence of the Annexures listed in the Table of Contents.

The Tenderer must complete as applicable all of the attached returnable Annexures by complying with the below corresponding requirements and instructions.

Annexure 1: Scope of Work and Tenderer's offer

- Tenderer's cover letter
- Tenderer's executive summary
- The Tenderer's offer should include:
 - A summary of the Tenderer's proposal
 - How the Tenderer is able to meet the tender requirements, including differentiators that Tenderer shows are advantages over other similar service providers or in this field of expertise. Include here any relevant information, which is not covered in other sections and information, which you believe will help convince the GCRO of your suitability as a successful service provider and your ability to add value.
 - Tenderers are expected to show that they:
 - have the necessary experience, know-how, skills and resources
 - be able to comply with the requirements as detailed in the Annexure 1 and 2. The Project must be complete by the period indicated in the Scope of Work.
- NB: All intellectual property and copyright generated in the course of the project, notably in the questionnaire, and all data, reports, and all other deliverables produced during the project, will belong to the GCRO. This includes all interview data as it is collected, as well as the final dataset.

Annexure 2: Pricing Schedule

- The pricing the Tenderer submits will be considered the Tenderer's final offer, which will be a Returnable Schedule that will become **Annexure 2: Pricing schedule** to the Contract. The

spreadsheet that is **Annexure 2** must be used to submit pricing as indicated in this tender invitation. This annexure must be wholly inclusive of all costs including vat.

- Tenderers must show the pricing information using the pricing template contained in **Annexure 2**. The Pricing schedule must be submitted in editable and printable softcopy on a USB in both the original Excel compatible (.xls) and .pdf formats.
- The Tenderer must provide analysed and total costs plus detailed descriptions of what is included in such costs as required in the Scope of Work contained in **Annexure 1**. Prices should be in Rands and inclusive of VAT.
- The pricing proposal should be accompanied by a detailed schedule of what is excluded from the pricing proposal and items the Tenderer assumes the University will provide e.g. any resources, consumables, additional equipment etc.
- The University reserves the right to conduct price audits during the contract duration.

Price Adjustments

Prices must remain firm for the duration of the Project.

Cost Savings

The University expects the Tenderer to be an active partner in generating ideas to reduce costs (including total cost of ownership) beyond only price reductions. Alternative cost reduction methods should be included in a separate spreadsheet in **Annexure 2**.

Part C1: Contract

The successful tenderer agrees to be bound to GCRO's contract terms and conditions. The contract will refer to the scope of work and relevant annexures (pricing, service levels, specifications and compliance schedules) as contained in the tender documentation. The tenderer acknowledges and agrees that the GCRO will accept no deviations to the contract or scope of work.

Note: The contract will be provided post-compulsory clarification meeting to be found on the aforementioned website.

Part C2: Annexures (refer Annexures listed in the Table of Contents above)