



**National  
Research  
Foundation**

## **Invitation to Bid**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS LISTED IN THIS DOCUMENT**

**Bid Number NRF/CORP HRM/62/2022-23**

### **SHORT DESCRIPTION OF REQUIREMENT**

**APPOINTMENT OF A SERVICE PROVIDER TO REVIEW JOBS DESCRIPTIONS AND PROVIDE JOB EVALUATION AND GRADING FOR ALL NRF JOBS USING PATERSON GRADING SYSTEM.**

## INVITATION TO BID (SBD 1A)

**Bid Number**

**NRF/CORP HRM/62/2022-23**

**Closing Date and Time (as per NRF systems)**

**21 March 2023 @ 11:00am**

### HIGH LEVEL SUMMARY OF REQUIREMENTS

The National Research Foundation (NRF) seeks the services of a reputable service provider to review and update current job descriptions and provide Job Evaluation and Job Grading of all NRF jobs using a Paterson grading system to ensure alignment across the organisation.

### RESPONSE DOCUMENTS ARE DELIVERED TO:

#### EMAIL DELIVERY AS FOLLOWS:

Quotations can be delivered by email before the closing date and time to: [bids@nrf.ac.za](mailto:bids@nrf.ac.za)

ONLY PDF DOCUMENTS ARE ACCEPTABLE LIMITED TO 20MB PER EMAIL. SEE ANNEXURE A.

**Bidding procedure enquiries may be directed in writing to:**

**Technical information may be directed in writing to:**

Section	SCM Secretariat and Operational Support	Section	Manager: Training and Organisational Development
Contact person	Vuyelwa Vabaza	Contact person	Sino Simpson
E-mail address	<a href="mailto:vl.vabaza@nrf.ac.za">vl.vabaza@nrf.ac.za</a>	E-mail address	<a href="mailto:sm.simpson@nrf.ac.za">sm.simpson@nrf.ac.za</a>

## SUPPLIER INFORMATION

**Name Of Bidder**

**Postal Address**

**Street Address**

**Telephone Number**

Code

Number

**Cell Phone Number**

Code

Number

**Facsimile Number**

Code

Number

**E-Mail Address**

**VAT Registration Number**

**Tax 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 (Paterson Grading systems) 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)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the entity have a branch in the RSA?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the entity have a permanent establishment in the RSA?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the entity have any source of income in the RSA?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the entity liable in the RSA for any form of taxation?	<input type="checkbox"/> Yes <input type="checkbox"/> 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.

## TERMS AND CONDITIONS FOR BIDDING (SBD 1B)

### 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. Bid pages are bound to minimise risk of lost pages.
1.3	This bid is subject to the Preferential Procurement Policy Framework Act, 2000, the General Conditions Of Contract (GCC) with its special conditions of contract, and, if applicable, any other legislative requirements.
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 <a href="http://www.sars.gov.za">www.sars.gov.za</a> .
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 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.

### 3. VALIDITY PERIOD FROM DATE OF CLOSURE

90 days

### 4. THE BIDDING SELECTION PROCESS

#### **Stage 1 – Compliance to submission requirements**

Bidders warrant that their proposal document has, as a minimum; the specified documents required for evaluating their proposals as set out in the Returnable Document List and conform to all the terms, conditions, and specifications as set out in this document.

#### **Stage 2 – Evaluation of Bids against Technical Specifications**

**Bidders achieving the minimum threshold in the specification to enter the Price/Preference scoring stage:**

#### **Stage 2A – Evaluation of Bids against Specifications including Quality**

The NRF evaluates each bidder's written response to the specifications issued in accordance to published evaluation criteria set out in this document.

#### **Stage 2B – Due Diligence Interviews or Proof of Delivery/Concept against Specifications**

Where circumstances justifies it, the NRF conducts interviews with shortlisted bidders for them to present further information or provide further proof to the evaluation committee. In these cases, the National Research Foundation provides the areas of concern to the short listed bidders to address in their presentations with this document and, where necessary, may provide further areas of concern to the short listed bidders at this stage.

#### **Stage 2C – Due Diligence Research**

The National Research Foundation confirms the recommended bidder(s)'s reference letters with referees to confirm the recommendation(s).

Further a due diligence on the financial capacity of the recommended service provider/s will be conducted should the NRF see it fit to do so.

### 5. THE AWARDING PROCESS

**Gate:**

## TERMS AND CONDITIONS FOR BIDDING (SBD 1B)

**Only those bids meeting the PPPFA Section 1 definition of “acceptable bid” enter the awarding process.**  
“Acceptable bid” is one which, in all respects, complies with the specifications and conditions of tender as set out in this document.

### **Stage 1 – Price Evaluation**

#### **Basis of fair competition:**

The NRF compares each bidder’s pricing proposal on an equal and fair comparison basis equitable to all bidders, taking into account all aspects of the bid’s pricing requirements including the application of fair pricing tests as set out below in the section “Insufficiency of Funds”.

#### **Ranking of the bidders pricing:**

The NRF ranks the qualifying bids on price with lowest priced Bid receiving the maximum points (either 80 or 90) and the remainder ranked in relation to the lowest priced bid.

### **Stage 2 –Preference Evaluation**

The NRF adds the bidders’ claimed preference points for the specified specific goals in this document as verified to the submitted preference claim form (SBD 6.1) to provide the final ranking for the award decision.

### **Stage 3 – Checking Tax Compliance**

#### **Stage 3A – Taxpayers Resident in South Africa**

The NRF notifies the recommended bidder in writing where their tax compliance check reflects that they are non-compliant and provides the recommended bidder seven (7) working days to submit written proof from SARS of their tax compliance status or proof that they have made an arrangement with SARS to meet their outstanding tax obligations. Failure to deliver such written evidence of compliance results in the rejection of that recommended bid.

#### **Stage 3B – Non-Resident Foreign Bidders**

Where foreign bidders are submitting a bid, they complete all sections of the SBD1 especially the tax questionnaire. The NRF submit the Foreign Bidder’s completed SBD1 to the South African Revenue Service to obtain from the South African Revenue Service the Confirmation of Tax Obligations letter. Where South Africa Revenue Services does not issue the letter, Stage 3A applies in clearing the reason for not receiving the letter.

### **Stage 4 – Award and Contract Signing**

The NRF nominates the bidder/s with the highest combined score for the contract award subject to the bidder having supplied the relevant administrative documentation.

## **6. ACKNOWLEDGEMENT OF READING EACH PAGE**

The bidder warrants by signature in this document that the bidder has read and accepts each page.

## **7. CENTRAL SUPPLIER DATABASE REGISTRATION**

Bidders are registered on the Central Supplier Database and to include in their bid their Master Registration Number (Supplier Number) in order to enable the NRF to verify the supplier’s tax status on the Central Supplier Database.

## **8. CLARIFICATION**

If the respondent wishes to clarify aspects of this request or the acquisition process, they contact the officials listed under the enquiries section above. The National Research Foundation does not provide the origin of the request to any party.

## **9. RESPONSE PREPARATION COSTS**

The NRF is not liable for any costs incurred by a bidder in the process of responding to this Bid Invitation, including on-site presentations.

## **10. COLLUSION, FRAUD AND CORRUPTION**

Any effort by Bidder/s to influence evaluation, comparisons, or award decisions in any manner will result in the rejection and disqualification of the bidder concerned.

## **11. FRONTING/NON-BENEFICIAL OWNERSHIP**

The NRF, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes where applicable, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in the bid documents. The onus is on the bidder to prove that fronting does not exist, should the National Research Foundation establish and notify the bidder of potential breaches of any of the fronting indicators as contained in the Department of Trade and Industry's "Guidelines on Complex Structures and Transactions and Fronting". Failure to do so within a period of 7 days from date of notification will invalidate the bid/contract and may also result in the restriction of the bidder to conduct business with the public sector for a period not exceeding 10 years, in addition to any other remedies the NRF may have against the bidder concerned.

## 12. DISCLAIMERS

The NRF has produced this document in good faith. The NRF, its agents, and its employees and associates do not warrant its accuracy or completeness. The NRF makes no representation, warranty, assurance, guarantee or endorsements to any provider/bidder concerning the document, whether with regard to its accuracy, completeness or otherwise and the NRF shall have no liability towards the responding service providers or any other party in connection therewith.

## 13. CANCELLATION OF THE QUOTATION PRIOR TO AWARD

**Procurement not required:** The NRF cancels the Bid Invitation prior to making an award if due to changed circumstances there is no need for the specified procurement in the document.

**No Acceptable Quotations:** The NRF cancels the Quotation Invitation prior to making an award if it receives no acceptable bids i.e. that do not meet the minimum requirements set out in this document.

**Invalid Bid Procedure:** The NRF cancels the Quotation Invitation prior to making an award if an irregularity occurred in the bid process that is material.

**Insufficiency of Funds at date of Award:** The NRF cancels the Quotation Invitation prior to making an award if the funds are no longer available to cover the total estimated contract value at the date of the evaluation.

**Quoted Prices are within a fair price range:** The NRF cancels the Quotation Invitation where the offered price is defective as being too low or too high to the identified fair price range. The NRF conducts fair pricing tests to arrive at an opinion of reasonableness of the offer price. Where these tests reflect pricing outside of the established fair price range, the evaluators may recommend price negotiation and no other component. The NRF starts negotiation with the winning bidder or, where that bidder refuses negotiation, with the next ranked bidder in the price/preference ranking until a market related price is achieved.

## SBD 1 SIGNATURE

**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:**

## SCOPE OF WORK

### INTRODUCTION TO THE NRF

The National Research Foundation Act, Act 23 of 1998 as amended by Act 19 of 2018, establishes the National Research Foundation ("NRF") as the juristic person that makes this bid invitation and will contract with the awarded bidder. The Public Finance Management Act classifies the organisation as a Schedule 3A Public Entity.

The NRF is the government's national agency responsible for promoting and supporting research and human capital development through funding, the provision of National Research Facilities and science outreach platforms and programs to the broader community in all fields of science and technology, including natural science, engineering, social science and humanities.

### CONTEXT OF THIS PROCUREMENT

In working towards realising the NRF 2025 Strategy and 2030 Vision, the NRF has embarked on a number of organisational changes to assist in ensuring the realisation of the vision. Some of those changes include:

- Organisation review which resulted in the restructuring and implementation of a new service delivery model.
- Skills Audit to take stock of the existing skills within the organisation, maximize the current skills and develop missing skills.
- Implementation of the Enterprise Resource Planning (ERP) system
- Organisational Culture Audit and Change
- Equal Pay for work of Equal value and others

Human Resources and Legal Services division is responsible for the successful attraction, placement, retention, and continuous development of a committed, skilled, and representative workforce. In implementing the new service delivery model, the NRF aims to create a collaborative effort across its Business Units, maximise employee's skills and motivate its leadership towards the attainment of its strategy objectives. As part of the process for internal and cross divisional equity within the NRF business units and among employees performing similar functions of similar scope the NRF has embarked on among others equal pay for work of equal value. Important as this analysis was, its completeness has to be borne out not only remuneration equity or parity but equally important is the grade equity.

Currently the NRF operates on the Peromnes grading system. Due to its diversity of functions and business unit spread as well as varying levels of work, both on the support and science performing functions, the current Peromnes grading system proves inadequate for the organisation. Consequently, there is a need for conducting an organisation wide benchmark process to ensure that jobs of equal value amongst other corrective measures are proportionately graded. This means migrating from the current system to a system that is aligned to Paterson grading standards and broad banding.

- The NRF consists of Corporate Functions and 7 Business Units which operate across most provinces in the country. The organisation has a total headcount of approximately 1300 employees and 850 jobs (approximately 360 support and 490 core).

### CONTRACT PURPOSE

The purpose of the bid is to invite qualified experienced service providers to submit proposals for the provision of the following services:

- Conducting job evaluation and grading for all positions within NRF in line with the Paterson Grading standards, to ensure equity of grading among similar and equivalent jobs in terms of various job elements and scope.
- Training on job evaluation and skills transfer of Paterson job evaluation system.
- Analyse and validate job profiles and create new job profiles where there is nonexisting.
- Engagement with the job holders prior to finalisation of the job contents.

- Establish a job evaluation quality assurance methodology
- Evaluate jobs as per the approved job profiles to confirm the internal relative size for positions.
- Determine criteria for reviewing grades of all positions and validate grades based on available information (existing job descriptions, grading reports etc.)
- Undertake job grading using Paterson Job Grading System/a system consistent with the Paterson system
- Transfer skills in using the Paterson Job Grading System to NRF staff.
- Develop Paterson linked pay scales i.e. establish the distribution of the current remuneration within the NRF , per grade
  - Cost the implications of adopting the pay scale
  - Comparison of each individual to the proposed scale
  - Determine recommendations for the management of outliers
  - Make recommendations on Paterson levels for adoption

**Minimum Deliverables:**

- All NRF positions being graded per the Paterson system.
- Validated job profiles.
- Developed capacity on job evaluation.
- Approved job evaluation quality assurance process and procedure.
- Approved salary scales report.
- Report on financial implications for adopting the recommendations considering the equal pay implementation implications.
- Identify scarce skills based on job profiles and market indicators.

**CONTRACT PERIOD**

The maximum contract period for this bid contract is 24 months and is subject to completion of contract form SBD7.

**INTERDEPENDENCIES TO OTHER PROCESSES IMPACTING THIS SPECIFICATION**

This project is dependent on the completion of the current organisational review and the approval of the proposed structures, creation of new job descriptions and review of the existing job descriptions as required, however certain phases of the project can and must be performed parallel with the finalisation of the organisational review

**DETAILED SPECIFICATION**

**SCOPE OF WORK**

The NRF is currently utilising Peromnes Job evaluation system, and the job evaluation will be conducted utilising the proposed and preferred Paterson grading system.

The NRF has identified a need to review the current Peromnes Job Evaluation process and grading system and embrace the Paterson system. This adoption of a new system will bring corrective measures and anomalies as identified in the recently completed 1) Skills Audit process for support jobs 2) Equal Pay for work of equal value process and 3) Organisational structure review that confirms certain potential grade congestion and inequity. The appointed service provider will assist the organisation in:

**1. Job Evaluation and Grading**

As part of the transition to the new online based grading system:

- Assess and develop a transition plan (transition from current to the envisaged new system).
- Identify and grade new and priority jobs based on the Paterson grading system standards. (Priority

positions as per the NRF needs and new based on the Organisation design outcome).

- Develop a plan to conduct bulk job evaluation to facilitate the implementation of equal pay for equal work value analysis outcome/recommendations..
  - Transition all jobs from the current grading system to the new one by providing new grading levels, broad banding and salary levels of jobs and positions.
  - Ensure consistency in the evaluation of the jobs of similar functions and levels.
  - Review existing jobs for accuracy in preparation for job evaluation.
  - For jobs with no profiles, create new job descriptions.
- Embed the new job evaluation and grading framework.

## **2. Training and System Access**

- Certified Training for HR Practitioners and Job Evaluation committee members and other stakeholders for internal use.
- Provide system access and licensing (licensing terms and conditions will be discussed and agreed upon with the appointed service provider).

## **3. Develop Paterson linked pay scales i.e. establish the distribution of the current remuneration within the NRF, per grade**

- Cost the implications of adopting the pay scale in line with the NRF's remuneration principles and philosophy.
- Comparison of each individual to the proposed scale.
- Determine recommendations for the management of outliers.
- Make recommendations whether the NRF should adopt all Paterson levels (upper vs lower levels or specific grades).

## **PROJECT OUTCOME AND DELIVERABLES**

- **Project Plan** must be provided within 2 weeks after signed contractual approval including:
  - Project deliverables and major milestones with RASCI matrix.
  - Timelines and reporting intervals.
  - Process of reviewing existing jobs and timelines.
  - Process of evaluating bulk / multiple jobs.
- Reports and Final Deliverables
  - Presentation of results / outcomes
    - Findings on anomalies and recommendations on corrective measures.
    - Project execution.
    - Transition from Peromnes to Paterson grading system plan.
    - Grading outcomes for the priority and new positions (this must be done sooner than at the end of the project).
- Training of employees (HR and Stakeholders) on the system.
- Job Evaluation Framework.
- Final Reports
  - Benchmark report (current grading vs new grading system).
  - Number of jobs and associated positions.
  - Number of jobs reviewed with significant changes (reduced or increased).
  - Number of new job descriptions created, validated and graded.
  - Pay scales report using the NRF principles and philosophy.

## BIDDER QUALIFYING REQUIREMENTS

- The service provider must provide their CSD documents and tax compliance certificates.
- The service provider must be registered or accredited with a recognized Job Evaluation or Remuneration body i.e. South African Remuneration Association (SARA).
- The service provider must show their geographical footprint.
- The service provider must submit detailed CVs and profiles of the consultants who will be conducting the job evaluations and creating job descriptions.
- The service provider must have at least three (3) written references of similar work performed in the last sixty months.
- The service provider must have a Job Evaluation System compatible to Paterson Grading System.
- The service provider must provide a summarized Approach and Methodology statements setting out how they will deliver the outputs of this contract.
- The service provider must provide detailed project plan with the methodology and process to be used in the project. The project plan must be aligned to the deliverables and outputs as detailed on the scope of work/detailed specification section of this document.
- The service provider must provide evidence demonstrating their capability and experience of this type of work.
- The service provider's proposed team must have at least 3 years' experience relevant to the scope of work.
- The team leader must have at least 5 years' experience in managing projects of similar nature (conducting Job profiling, Job Evaluation and Grading, remuneration/salary benchmark).
- The service provider has a minimum of 5 years' experience in conducting Job Evaluation & Grading in a similar environment (company registration documents to be supplied).

## SETS OF QUOTATION DOCUMENTS REQUIRED

**Number of ORIGINAL bid documents for contract signing** 1

Bidders must submit the above number of original documents by email in PDF format. These serve as the original sets for the legal bid document and, upon award and signature, the legal contract document between the bidder and the NRF. (Where only one set is requested, this remains with the NRF with the service provider keeping similar copy for contracting purpose). The bidders attach the originals or certified copies of any certificates stipulated in this document to these original sets of bid documents.

## RETURNABLE DOCUMENTS REQUIRED

The bidder is to complete this table and to supply the necessary page references to the supporting documentation. **A bidder failing to adequately provide any of the mandatory documents is automatically disqualified.**

**Legislative/Technical Documents**

**Compliance**

(M – Mandatory); (O – Optional)	Submitted	Bid Section Reference	Reference to Bidder's document
<b><u>Bidder Eligibility</u></b>			
Procurement Invitation (SBD 1), signed and completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 2, 6, 25
Bidder's Disclosure (SBD 4), signed and completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 17 to 20
Preference Points Claimed (SBD 6.1), signed and completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 20 to 24

### **Selection Criteria**

(M – Mandatory); (O – Optional)	Submitted		Bid Section Reference	Reference to Bidder's document
The bidder or service provider must provide their CSD documents and tax compliance certificates	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 4, 10	
The bidder or service provider must provide evidence certificate/s of registration or accreditation with a recognized professional body i.e. South African Rewards Association (SARA)	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 10	
Job Evaluation System compatible to Paterson Grading System	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 10	
The bidder or service provider must provide names, contact details and profiles of the consultants who will be conducting the job evaluations and working on job descriptions	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 10	
<b>Price Offered Documents</b>	<b>Compliance</b>			
Pricing Schedule in this document to be completed.	<b>M</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 13	
Detailed pricing schedules and supporting documents	<b>O</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	N/A	

## ELIGIBILITY CRITERIA (GO/NO-GO)

Selection Element	Meet Specification Minimum	Bid Section Reference	Reference to Bidder's document
1 <b>Approach and Methodology</b> Detailed project plan with a methodology and process to be adopted in the project. The project plan must be aligned to the deliverables and outputs as detailed on the spec	<input type="checkbox"/> YES <input type="checkbox"/> NO	Returnable Documents' Bidder Eligibility section on page 10	
2. <b>Capability and experience of the proposed consultants / team:</b> Demonstrate experience and qualifications of the proposed team by: a) Attaching CVs and qualifications for all team members b) Proposed team must have at least 3 years' experience relevant to the scope of work. c) Team leader must have at least 5 years' experience in managing projects of similar nature (conducting Job profiling, Job Evaluation and Grading, remuneration/salary benchmark)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Returnable Documents' Bidder Eligibility section on page 10	
4 Service Provider has a minimum of 5 years' experience in conducting Job Evaluation & Grading in a similar environment (company registration documents to be supplied)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Bidder Eligibility section on page 10	
5 Three (3) written references with contact details for those customers for whom the bidder has completed similar scope of work within the last sixty (60) months. Reference letters must "Meet requirements" in line with the reference letter template, dated, signed and be in the referring company's letterhead.	<input type="checkbox"/> YES <input type="checkbox"/> NO	Due diligence of Eligibility on page 10 and 24	

## SBD 3.1: PRICING DETAIL

### Pricing Special Conditions

1	<b><u>Pricing Schedule:</u></b> In terms of <u>General Conditions of contract clause 17.1</u> , the price schedule remains unchanged for the duration of the contract with the NRF accepting no changes, extensions, or additional ad hoc costs to the pricing conditions of the contract with the exception of any price adjustments authorised in the Special Conditions of Contract for pricing set out below:
2	<b><u>Firm Quantities over the Contract Period:</u></b> The NRF states what firm quantities are required during the current period. The NRF determines the time of delivery during the contract period.
3	<b><u>Estimated quantities over the Contract Period:</u></b> The NRF may require further quantities during the current contract period for the reason of future operational requirements where the quantities and timing are not yet known at the date of bid.
4	<b><u>Ceiling Price Calculation:</u></b> For bidding purposes and to establish the contract ceiling price, the NRF provides estimated quantities of what its requirements and estimated timing during the contract period for bidders to establish their pricing.
5	<b><u>Commitment to Contracted Service Provider:</u></b> The NRF does not provide guarantees or commitments that it will order this entire amount during the contract's life. The NRF, through the signed contract, guarantees its procurement of the specified goods and/or services is from the contracted party only. The NRF, when issuing the written purchase order, guarantees that the funding is available . and/or with the actual quantity and time of delivery being determined when such quantities are needed..
6	<b><u>Commitment of funding to the Contract:</u></b> The NRF, when issuing the written purchase order under the contract , guarantees that the funding is available for that purchase order.
7	<b><u>Placement of written purchase orders for actual quantities ordered:</u></b> The NRF manages the execution of this contract through the issue of written purchase orders – stipulating quantity, description, delivery date, and the unit price as set out in this contract - for the contracted supplies.
8	<b><u>Price Adjustments:</u></b> In terms of <u>General Conditions of Contract clause 17.1</u> , the price adjustments with the rules for application are set out below as special conditions of <u>Contract Clause 17.1</u> . <b><u>Price adjustments and their corresponding rules are for the management of price risks on the basis of the NRF and the contracted bidder sharing the risk equally.</u></b>
9	<u>Price quoted</u> is South African Rands in terms of General Conditions of contract clause 16.4
10	<b><u>Price Basis</u></b> Price quoted is fully inclusive of all costs including delivery to the specified NRF price delivery point and includes value- added tax, income tax, unemployment insurance fund contributions, and skills development levies in terms of General Conditions of contract clauses 12, 32.1, and 32.2.
11	<b><u>Price Delivery Point:</u></b> In cases where different delivery points influence the pricing, the bidder submits a separate pricing schedule for each delivery point. Delivery points are: NRF Head Office
12	<b><u>Detail Pricing Support:</u></b> Detailed information e.g. costed bill of quantities is optional where not stated in the price schedule below and is provided as an annexure to the details included in this SBD 3
13	<b><u>Application of Preference Points:</u></b> Pricing is subject to the addition of Preference Points as stipulated below - Standard Bidding Document 6.1 Preference claim form.

## SBD 3.1: PRICING DETAIL

### PRICING SCHEDULE

	QTY	DESCRIPTION/ (Reference to specific specification)	UNIT OF MEASURE	UNIT PRICE	TOTAL PRICE INCL. VAT
1	850	Conduct Paterson aligned job evaluations	EA		
2	50	New job descriptions created	Per job		
3	600	Job Descriptions reviewed and validated	Per job		
4	1	Provide a detailed report on all jobs evaluated	EA		
5	1	Identify jobs of equal value and validate associated grades	EA		
6	1	Project Management Fees (Including Presentations of Project Plans and Other Reports)	Total project		
7	1	Project Close-Out Report	EA		
Total Cost is determined by multiplying quantity by unit price for all line items					
TOTAL CONTRACT VALUE OF ABOVE (CEILING PRICE)				R	

## GENERAL CONDITIONS OF CONTRACT

The National Research Foundation cannot amend the National Treasury's General Conditions of Contract (GCC). The National Research Foundation therefore appends Special Conditions of Contract (SCC) providing specific information relevant to a GCC clause below the relevant GCC. The National Research Foundation has filed its General Conditions of Contract GCC) on its website (<http://www.nrf.ac.za/procurement/General-Conditions-of-Contract>). These form part of this document's contract conditions. The NRF deems the bidder to have accessed and read the General Conditions of Contract. Whenever there is an unintended conflict, the provisions of the Special Conditions of Contract, listed below, shall prevail over the General Conditions of Contract.

## SPECIAL CONDITIONS OF CONTRACT

- 1 **Implementation Planning and Project Management:** The contracted provider will arrange an initial meeting to determine delivery execution with the assigned NRF project team. Both parties will review the proposed project execution plan submitted with the bid and agree on the finalised timetable stating clearing commence date and completion date of each stage of the implementation. Special conditions pertaining to project management are listed below (if applicable).
- 2 **Performance verification:** In terms of GCC Clause 16 read with the SCC Clause 16.2A, the NRF appointed contract manager or agent verifies that the performance of this contract in terms of services, delivery service, goods, labour and any other element specified in this contract is at the contracted performance level and/or the goods meet the contracted specifications with the represented of the contracted provider. Both parties verify this through signing the verification documentation. Both parties, at this time, agree on quantity, unit cost and total value on the same signed document.
- 3 **Contracted Party Due Diligence:** The NRF has the right to conduct supply chain due diligence including site visits and inspections at any time during the contract period.
- 4 **Communication:** The contracted parties communicate in writing through mail, delivery, or email. The contracted party states the contract number and purchase order number, if the latter is applicable, on communication documentation. The contract party does not act upon any communication without the contract number or must verify such communication with the assigned NRF contract manager prior to acting upon it.
- 5 **Occupational Health and Safety when working on NRF sites:** All personnel performing work on NRF site/s as part of this contract are responsible to obtain safety induction.  
  
Over and above the obligations provided by the Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations, known as 'the Act'), the contracted party meets with all relevant health and safety instructions as given to them by site safety personnel, where relevant. Personal protection equipment including closed safety shoes, hard hats, height safety equipment, and high visibility vests are worn at all times while on the work site. All personnel are to obey the relevant instructions, including signage, related to restricted access and speed limits on all sites.  
  
The contracted party, once signing the contract (SBD 7.1 or SBD 7.2), is responsible for itself, its employees, and those people affected by its operations in terms of the Act the regulations promulgated in terms thereof. The contracted party performs all work and uses equipment on site complying with the provisions of the Act.  
  
To this end, the contracted party shall make available to the NRF on the valid Letter of Good Standing in terms of the COID Act and ensures its validity does not expire while executing this bid, where applicable. The contracted party furnishes its registration number with the office of the Compensation Commissioner. The contracted party enters into a Section 37.2 agreement in terms of Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations) that the NRF drafts.  
  
The contracted party maintains a health and safety plan complying with the requirements of The Act at the work site during the period that contracted work takes place on the site.

## GENERAL CONDITIONS OF CONTRACT

The NRF manages the contracted party in his capacity for the execution of this contract to meet the provisions of the said Act and the regulations promulgated in terms thereof. The contracted party accepts liability for any contraventions to the Act. Each member of the contracted party's team (including sub-contracted personnel), submit a signed indemnity form prior to entering the work site and kept in the contracted party's health and safety file.

## MANAGEMENT OF PERFORMANCE LEVELS

1. The Performance Levels are in the table below.
2. The NRF measures the contracted bidder's performance against these in the execution of the contract.
3. The contracted bidder recognises that its failure to meet the performance levels has material adverse impact on the operations of NRF and that the damage from the contracted bidder's failure to meet any performance level is not susceptible to precise determination.
4. The NRF excuses the contracted bidder from failing to comply with the performance levels to the extent that non-performance or delayed performance is solely and directly attributable to an act or omission of the NRF or its staff or circumstances of force majeure as referred to in this Agreement.
5. If the contracted bidder fails to meet any performance level:
  1. The contracted bidder shall investigate and report on the root causes of the performance level failure;
  2. Promptly correct the failure and begin meeting the set performance levels;
  3. Advise the NRF as and to the extent requested by the NRF of the status of remedial efforts being undertaken with respect to such performance level failure; and
  4. Take preventive measures to prevent the recurrence of the performance level failure.
6. Both parties are responsible for monitoring and measuring the performance of the contracted bidder against the performance levels set in this document. The NRF deems failure by the contracted bidder to measure performance with respect the contract specifications for any measurement period as a failure to meet the stipulated performance levels.

### PERFORMANCE LEVELS STATEMENT

Service/Goods being Measured	Measurement Methodology	Trigger	Penalty/Bonus and level applicable from
Project planning and monitoring	Measure deliverables against the set due dates	Service provider is three days overdue against given milestones	Written warning and explanation of delay and actions taken to recover.  Penalty is the total cost to the NRF of the unproductive time of its staff.

Service/Goods being Measured	Measurement Methodology	Trigger	Penalty/Bonus and level applicable from
Job gradings	Job grading quality assessed against Patterson grading standards	Job gradings are not acceptable	<p>First occurrence – re-performed at the cost to the service provider.</p> <p>Second occurrence – re-performed at the cost to the service provider plus payment of monetary penalty equal to the cost of reperformance.</p> <p>Third occurrence – re-performed at the cost to the service provider plus payment of monetary penalty twice the cost of reperformance.</p>
Report production	Report quality as set by the NRF	Report output is valueless and report presentation provides no added value	Withhold payment until the issue is resolved

## SBD 4 – 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 interest<sup>1</sup> 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.

<sup>1</sup> 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.

**SBD 4 – BIDDER’S DISCLOSURE**

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:

.....  
 .....

**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,

## SBD 4 – BIDDER’S DISCLOSURE

agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> 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

<sup>2</sup> 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 CLAIMED (SBD 6.1)

### 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.
- b) The 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

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;

## PREFERENCE POINTS CLAIMED (SBD 6.1)

### IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

- (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

#### 3.1. POINTS AWARDED FOR PRICE

1.

##### 3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

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

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{min}$  = Price of lowest acceptable tender

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

##### 3.2.1. POINTS AWARDED FOR PRICE

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

$$P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right) \text{ or } P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{max}$  = Price of highest acceptable tender

### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. 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:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether

## PREFERENCE POINTS CLAIMED (SBD 6.1)

### IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

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.**

**The NRF will use the B-BBEE status level scoring table**

Preference points are allocated to both procurement and income-generation based on the two different thresholds in terms of the table below:

The specific goals allocated points in terms of this tender:  B-BBEE Status Level of Contributor	Number of points allocated (80/20 system)	Number of points claimed (80/20 system)  (To be completed by the tenderer)
1	20	
2	18	
3	14	
4	12	
5	8	
6	6	
7	4	
8	2	
Non-compliant	0	

**DECLARATION WITH REGARD TO COMPANY/FIRM**

4.3. Name of company/firm.....

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

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

**PREFERENCE POINTS CLAIMED (SBD 6.1)**

**IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022**

- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. 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:** .....

.....

.....

## REFERENCE LETTER FORMAT

### Referee Letterhead

**Referee Legal Name:**

**REFERENCE ON COMPANY:**

**Bid Number:**

NRF/CORP HRM/62/2022-23

**Bid Description: PATERSON JOB EVALUATIONS AND JOB DESCRIPTIONS DESIGN**

Describe the service/work the above bidder provide to you below

Criteria / risks	Below requirements	Meets requirements	Exceeds requirements
<i>Professionalism</i>			
<i>Completion times</i>			
<i>Satisfaction with work done</i>			
<i>Technical capability</i>			
<i>Communication</i>			
Overall Impression	Other comments		
Approximate value of contract			
Would you use the provider again?			<input type="checkbox"/> YES <input type="checkbox"/> NO

<b>Completed by:</b>	
<b>Signature:</b>	
<b>Company Name:</b>	
<b>Contact Telephone Number:</b>	
<b>Date:</b>	

## BID SUBMISSION CERTIFICATE FORM - (SBD 1)

I hereby undertake to supply all or any of the goods, works, and services described in this procurement invitation to the NRF in accordance with the requirements and specifications stipulated in this Bid Invitation document at the price/s quoted.

My offer remains binding upon me and open for acceptance by the NRF during the validity period indicated and calculated from the closing time of Bid Invitation.

The following documents are deemed to form and be read and construed as part of this offer / bid even where integrated in this document:

	Invitation to Bid (SBD 1)	Specification(s) set out in this Quotation Invitation inclusive of any annexures thereto
	Bidder's responses to this invitation as attached to this document	Pricing Schedule(s) including detailed schedules attached if applicable
	Bidder's Disclosure (SBD 4)	Central Supplier Database Report
	Preference (SBD 6.1) claims for specific goals, supported by a valid certified B-BBEE certificate or sworn affidavit.	
	General Conditions of Contract and special/additional conditions of contract as set out in this document	

I confirm that I have satisfied myself as to the correctness and validity of my offer / bid in response to this Bid Invitation; that the price(s) and rate(s) quoted cover all the goods, works and services specified in the Bid Invitation and cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me in terms of this Bid Invitation as the principal liable for the due fulfilment of the subsequent contract if awarded to me.

I declare that I have had no participation in any collusive practices with any Bidder or any other person regarding this or any other Bid.

I certify that the information furnished in these declarations (SBD 3.1 , SBD 4, SBD 6.1) is correct and I accept that the NRF may reject the Bid or act against me should these declarations prove to be false.

I confirm that I am duly authorised to sign this offer/ bid response.

<b>NAME (PRINT)</b>	
CAPACITY	
SIGNATURE	
<b>WITNESS 1</b>	
NAME	
SIGNATURE	
<b>WITNESS 2</b>	
NAME	
SIGNATURE	
DATE	

## ANNEXURE A - ELECTRONIC BID SUBMISSION – GUIDELINE FOR BIDDERS

This document serves the purpose of providing the bidder with guidelines and prescripts on how to submit their bids to the NRF via e-mail.

**Conditions for electronic submissions:** This section does not apply to soft copies requested on manual submissions. It applies when email submissions are permitted. In circumstances where they are advisable, the business unit needs to ensure that they have appropriate controls and processes in place, such as:<sup>3</sup>

- Valid process of ensuring that bidder's electronic signatures complies with legislation such as The Electronic Communications and Transactions Act, 25 of 2002 (the ECT Act),
- System records exact time and date of submission in a manner that provides appropriate probity to stakeholders such as auditors,
- System to prevent unauthorised access and system to show if infringement,
- System of authorised persons to set / change dates for opening data received,
- System allows simultaneous communication,
- System of record-keeping meets legislative requirements such as The National Archives and Records Service of South Africa Act (Act. No. 43 of 1996, as amended).

### PRESCRIPTS

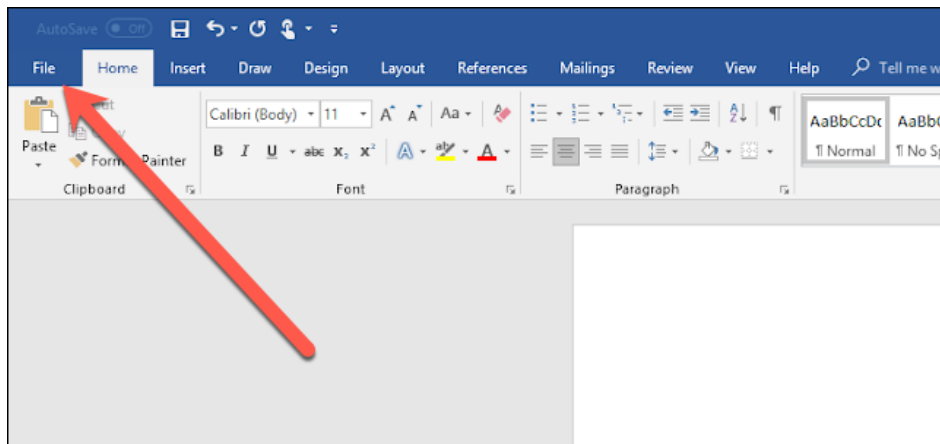
- All files must be submitted in pdf format unless otherwise stated.
- Pricing submission (including any SBDs where bidder's price is quoted) must be password protected and submitted as a separate file.
- **Two envelope system:** All bidders' documents must be submitted to the email address specified on the NRF bid document and however the password to the password-protected pricing file must be submitted to a separate email stated in the email specified in the bid document.
- The bidder must ensure that their submission is no bigger than 20 MB limit.
  - Your files must be Zipped to ensure that your submission is in line with the email size limit
- Timeline for submitting password to NRF
  - The password for pricing file must **not** be submitted before the bid closes.
  - The password may be submitted 1 minute after bid closure and no later than 2 days post bid closure. Failure to submit within 2 days may lead to bid being unable to be evaluated thus rendering them unresponsive.
- The subject of your email quote verbatim the bid name in the exact words provided in the NRF bid document.

### GUIDELINES

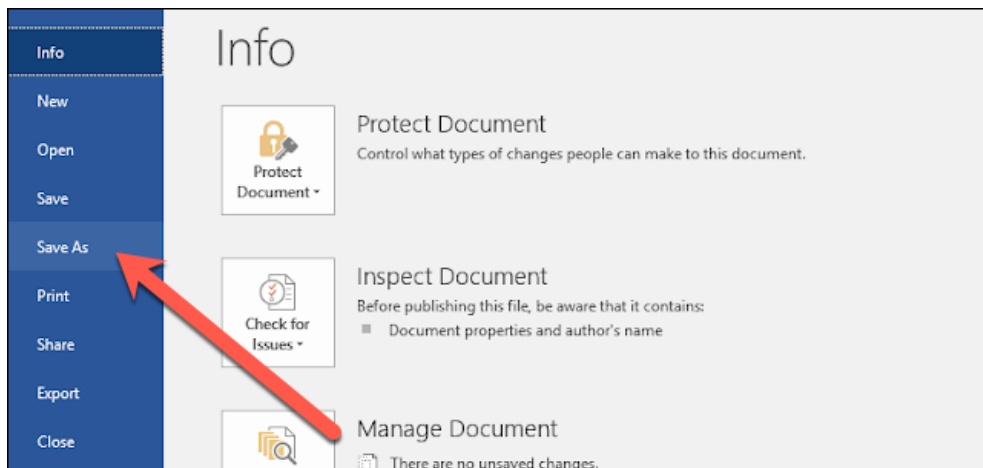
<sup>3</sup> SANS 10845-1 paragraph 4.7

## Converting to pdf

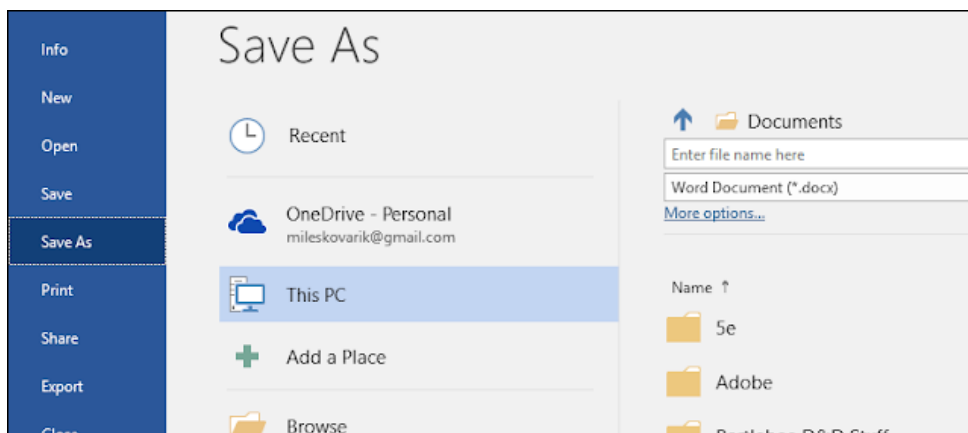
- If you have the desktop version of Microsoft Word, the easiest way to convert your document to PDF is right in Word itself.
- Open the document you want to convert, and then click the “File” tab.



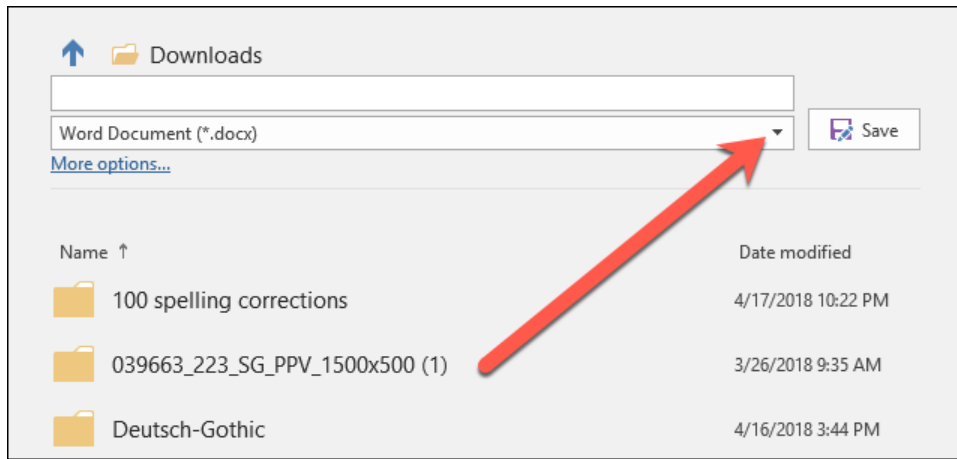
- On the backstage screen, select “Save As” from the list on the left.



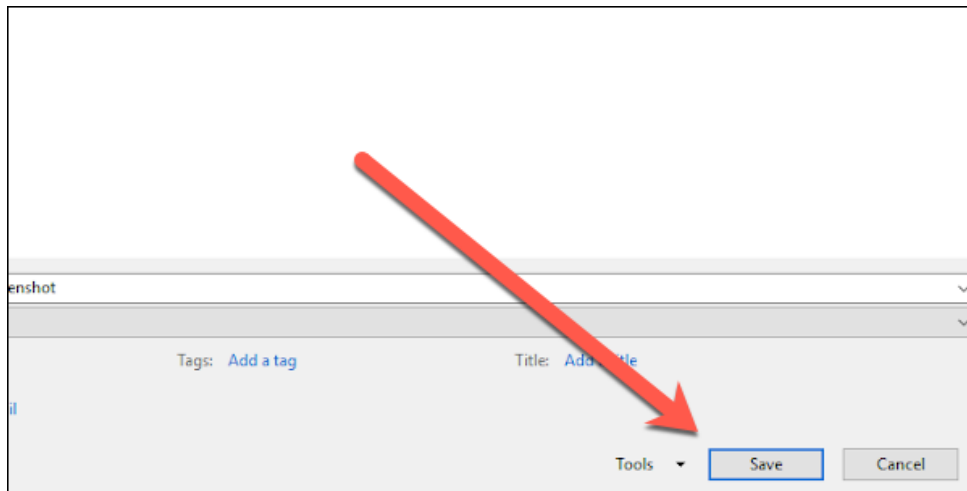
- On the Save As screen, select where you would like the PDF to be saved (OneDrive, This PC, a particular folder, or wherever).



- Next, click the dropdown arrow on the right side of the “Save as type” box, and select “PDF (\*.pdf)” from the dropdown menu.



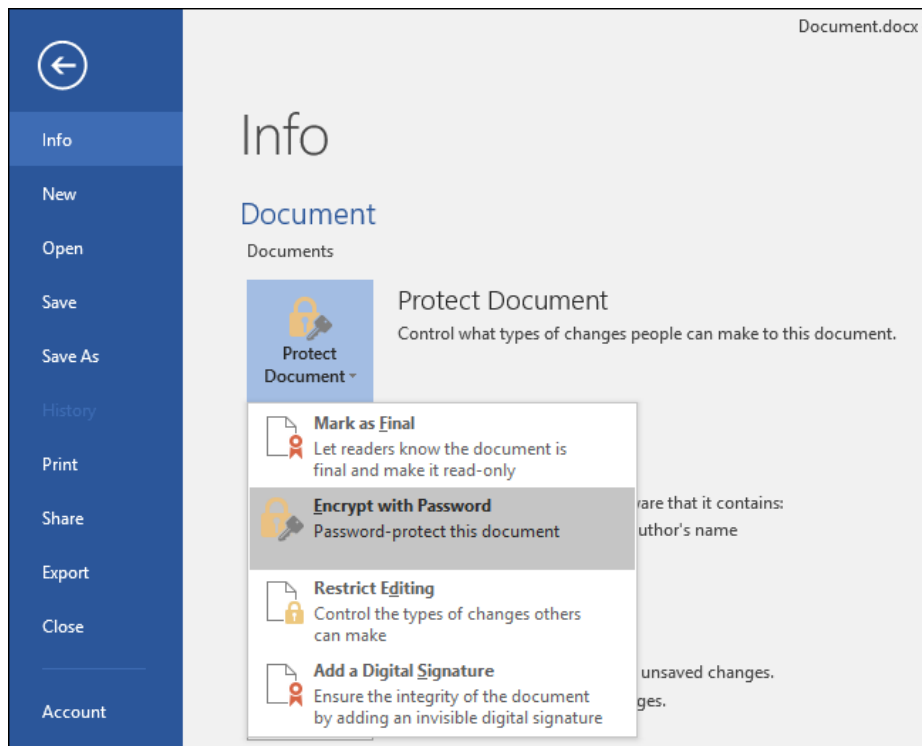
- If you want to, you can change the filename at this time. When you're ready, click the "Save" button.



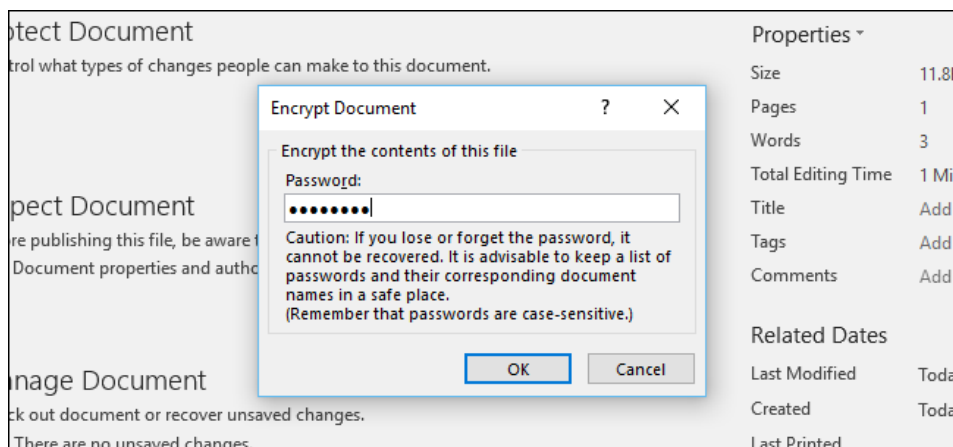
- After saving the PDF, you'll be returned to your Word document, and the new PDF will open automatically in your default PDF viewer.

## Password protecting files

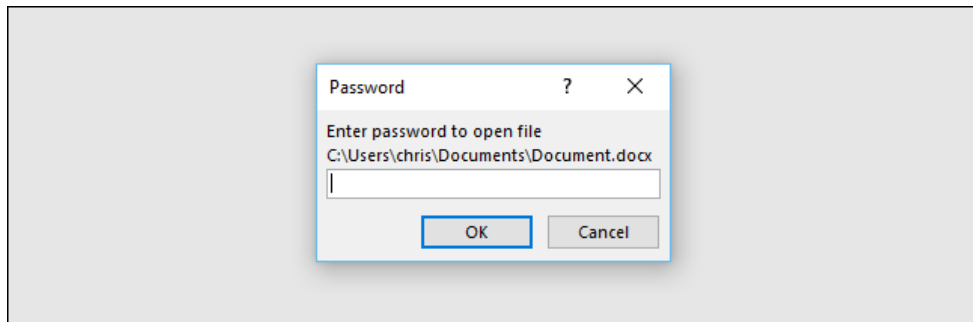
- To password protect an Office document, first open it in Word, Excel, PowerPoint, or Access. Click the "File" menu at the top-left corner of the screen. On the Info pane, click the "Protect Document" button and select "Encrypt with Password."
- The button is only named "Protect Document" in Microsoft Word, but it's named something similar in other apps. Look for "Protect Workbook" in Microsoft Excel and "Protect Presentation" in Microsoft PowerPoint. In Microsoft Access, you'll just see an "Encrypt with Password" button on the Info tab. The steps will otherwise work the same.
- NOTE: If you only want to restrict editing of the document, you can choose "Restrict Editing" here, but as we said, that is not very secure and can easily be bypassed. You're better off encrypting the entire document, if you can.



- Enter the password you want to encrypt the document with. You'll want to choose a good password here. Weak passwords can be easily guessed by cracking software if someone gains access to the document.
- **Warning:** You'll lose access to the document if you ever forget your password, so keep it safe! Microsoft advises you write down the name of the document and its password and keep it in a safe place.



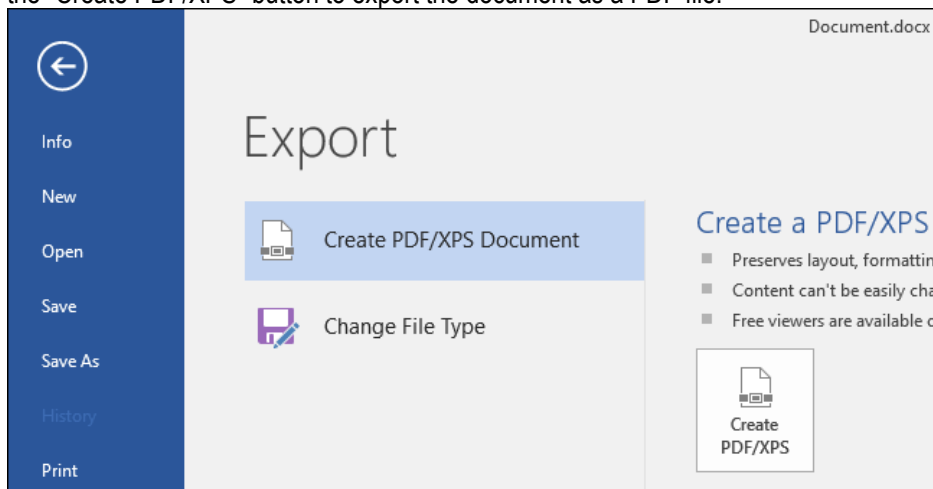
- When a document is encrypted, you'll see the "A password is required to open this document" message on the Info screen.
- The next time you open the document, you'll see an "Enter password to open file" box. If you don't enter the correct password, you won't be able to view the document at all.



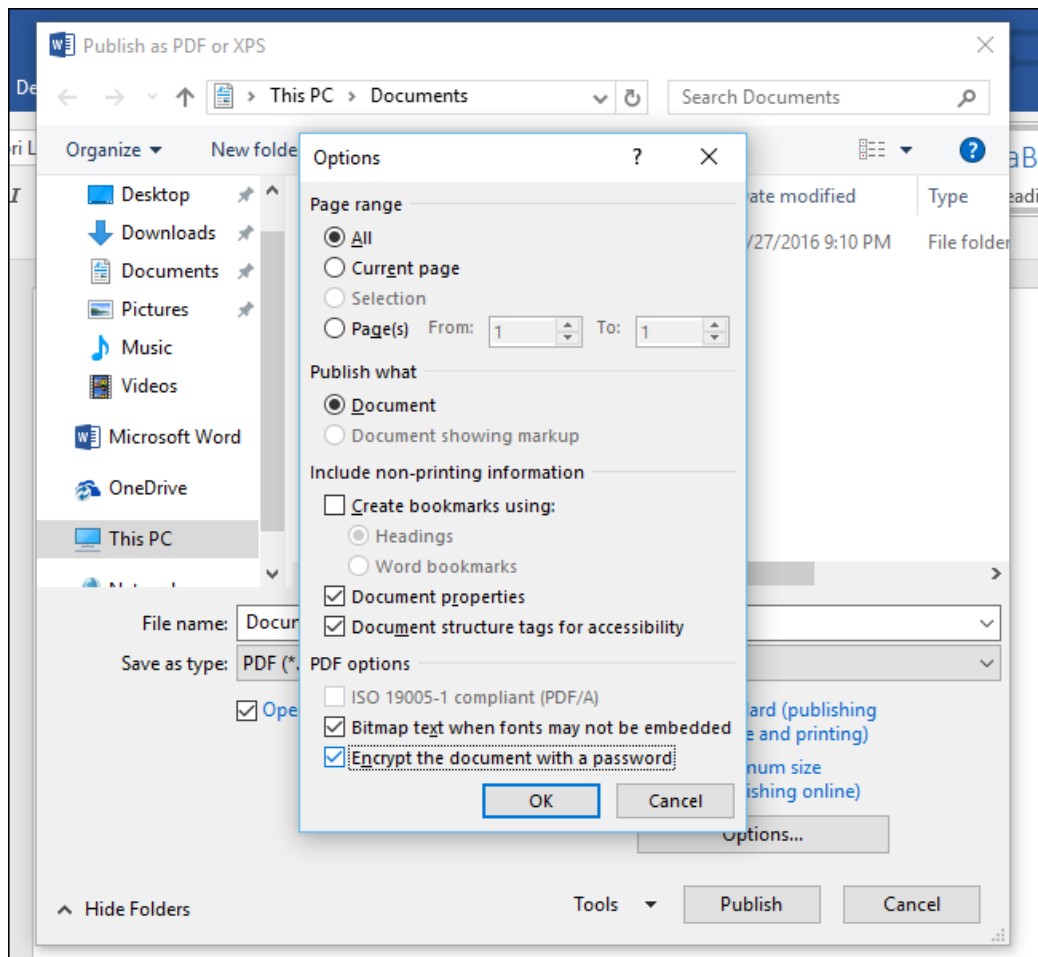
- To remove the password protection from a document, click the “Protect Document” button and select “Encrypt with Password” again. Enter a blank password and click “OK.” Office will remove the password from the document.

### How to Create a Password Protected PDF File

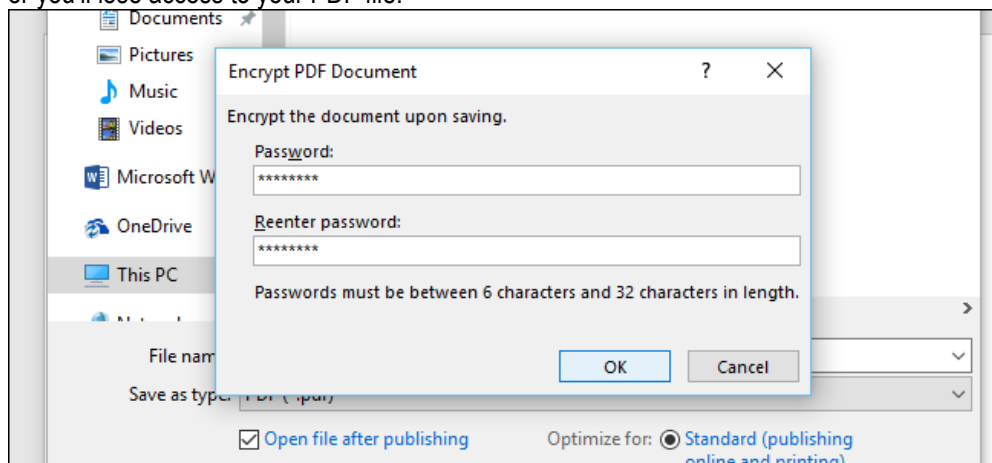
- You can also export an Office document to a PDF file and password protect that PDF file. The PDF document will be encrypted with the password you provide. This works in Microsoft Word but not Excel, for some reason.
- To do this, open the document in Microsoft Word, click the “File” menu button, and select “Export.” Click the “Create PDF/XPS” button to export the document as a PDF file.



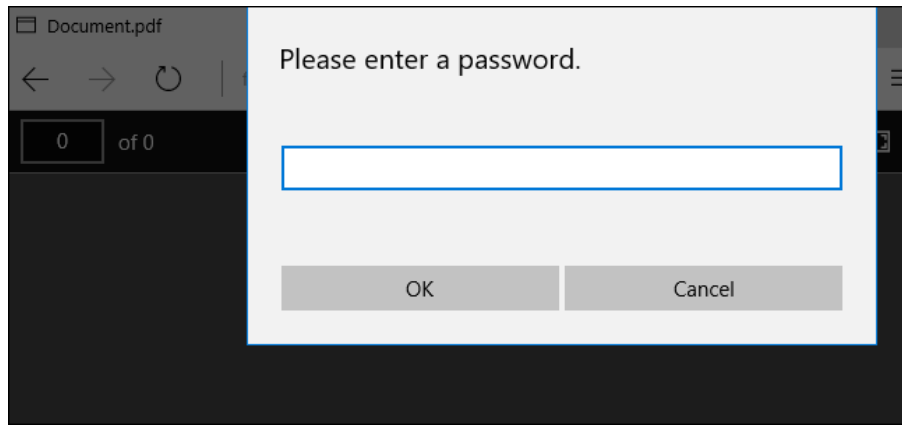
- Click the “Options” button at the bottom of the save dialog window that appears. At the bottom of the options window, enable the “Encrypt the document with a password” option and click “OK.”



- Enter the password you want to encrypt the PDF file with and then click “OK.”
- When you’re done, enter a name for the PDF file and click the “Publish” button. Office will export the document to a password-protected PDF file.
- **Warning:** You won’t be able to view the PDF file if you forget the password. Be sure to keep track of it or you’ll lose access to your PDF file.



- You’ll have to enter the PDF file’s password when you open it. For example, if you open the PDF file in Microsoft Edge–Windows 10’s default PDF viewer–you’ll be asked to enter the password before you can view it. This also works in other PDF readers.



### **Zipping your files.**

- Put all the files into a new folder
- Right-click on the folder to be sent
- Select "Send To" and then click "Compressed (Zipped) folder"
- The files will start compressing
- After the compression process is complete, attach the compressed file with the extension .zip to your email.

### **Keeping passwords safe.**

We recommend that you store the password either as a note on a hardcopy document which is then filed or stored safely or a softcopy that is saved in the bid response folder once the bid has been submitted or in line with your document management policy.