

**GUIDELINES
FOR EVALUATION
OF PROCUREMENT DOCUMENTATION
ACCORDING TO THE
PROCUREMENT DOCUMENTS AS APPROVED BY UFS
ÁUGUST 2013**

GENERAL NOTES:

A The following may be regarded as immediate disqualification

- a. CUDB rating not as required
- b. Minimum Preference and Quality goal not reached
- c. If any of the documents is found to be fraudulent
- d. No BBB-EE certificates
- e. Bank rating as required not obtained]
- f. Non-attendance of compulsory site inspection

B If any other documentation is outstanding the tenderer may be notified by e-mail and will then have three working days from date of e-mail to submit such documentation. If not received within three day the tenderer will be a not-responsive tender and will be disqualified

C Principal Agent to verify experience as well as references provided.

D The Quantity Surveyor to obtain a bank rating as well as to verify BBB-EE certificates from company which has issued it.

E The tender adjudication report to be proved in the standard format as required
If any of the following documentation are not submitted/obtained it will be a not-responsive

Mr. Nico Janse van Rensburg
Senior Director
UFS: Physical Planning
University of the Free State
P.O. Box 339
BLOEMFONTEIN
9300

20 September 2013

ATTENTION: Mr Nico J van Rensburg

Sir

XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX XXXXXXXXXX :
TENDER ADJUDICATION REPORT

Attached the tender adjudication report for the above mentioned project.

1. Attached the following:

Tender adjudication report
Tick Sheet
Addendum A - Adjudication based on points
Calculation of points based on quality
Calculation of points based on preference
Returnable documents T1.1 – T1.2 (As submitted by Principal agent)

**2. The following information received from the of four highest scoring
Tenders received also attached:**

Final Summary page
Form of Offer and Acceptance
T2.2 pages 1-4 (As submitted by the Tenderer)
Comparison between four highest scoring Tenders received and pre-tender estimate

3. Estimate – Based on priced Bills of Quantities

We trust you find the above mentioned in order. You are welcome to contact writer should you require any further information.

Yours faithfully

XXXXXXX
XXXXXXX

UNIVERSITY OF THE FREE STATE

Senior Director : Physical Planning
University of the Free State
PO Box 339
BLOEMFONTEIN
9300



Date

TENDER ADJUDICATION REPORT

1.0 PROJECT DETAILS

PROJECT TITLE			
SCOPE OF WORK			
NEAREST TOWN	BLOEMFONTEIN	REGION	FREE STATE

2.0 TENDER DETAILS

TENDER ADVERTISEMENT	NEWSPAPER	NO	
	OTHERS	INVITED TENDERS	
TENDER INVITATION DATE		NUMBERS OF TENDERS BELOW ESTIMATE	
TENDER CLOSING DATE		PRE-TENDER ESTIMATE	
TENDER VALID UNTIL		CONTRACT PERIOD	
TENDERS RECEIVED		SUBJECT TO CPAP	
NUMBER OF TENDERS ABOVE ESTIMATE		CONTRACT TYPE	JBCC Principal Building Agreement

3.0 TENDER ANALYSIS

TENDERER	TENDER PRICE (R)	PRICE DIFF (R)	PRICE DIFF (%)
Pre-Tender Estimate	R -	R -	
1	R -	R -	
2	R -	R -	
3	R -	R -	
4	R -	R -	
5	R -	R -	
6	R -	R -	
7	R -	R -	

4.0 DETERMINATION OF RESPONSIVENESS

To determine the responsiveness of a tender, the following must be considered:

that it complies with the conditions of the Tender

that all returnable schedules are duly completed

that an authorized person signs the tender

that all clarifications were submitted

that the tender meets minimum participation goal

that the tender contains no unacceptable qualifications

Contractor	Is tender responsive	Outstanding
1		
2		
3		

4		
5		
6		
7		

5.0 ADJUDICATION BASED ON POINTS

See attached addendum A

6.0 ACCEPTABLE TENDERS NOT RECOMMENDED

TENDERER :		TENDERER :	
TENDER PRICE (R)		TENDER PRICE (R)	
REASON(S)		REASON(S)	

7.0 PREVIOUSLY MARGINALISED FIRM(S) CONSIDERED AND NOT RECOMMENDED

TENDERERS	N/A		

8.0 REPORT COMPILED BY

Quantity Surveyor	
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PROJECT:

TICK SHEET

CHECK FOR RESPONSIVENESS

	DESCRIPTION	Page Reference	1	2	3	4	5	6	7
A	Tenderer's Questionnaire - T2.2 page 1	T2.2 page 1							
B	Schedule of three recently completed projects of similar kind and value - T2.2 page 2	T2.2 page 2							
C	Schedule of projects currently under construction - T2.2 page 3	T2.2 page 3							
D	Schedule of Proposed Subcontractors - T2.2 page 4	T2.2 page 4							
E	Certificate of attendance at compulsory clarification Meeting T2.2 page 5	T2.2 page 5							
F	Proof of Registration with CIDB - T2.2 page 6	T2.2 page 6							

G	Record of Addenda to Tender Documents T2.2 page 7	T2.2 page 7							
H	Proposed Amendments and Qualifications - T2.2 page 8	T2.2 page 8							
I	HDI Equity (T2.1 Addendum)	T2.1 Addendum							
J	Returnable Schedules (Annexure D) - T2.3	T2.3 Annex D							
1	An original valid tax clearance certificate issued by the South African Revenue Services (SARS).	D1							
2	Either and original cancelled cheque or stamped letter from the bank, verifying the banking details.	D2							
3	A certified copy of the original business registration documents.	D3							
4	A certified copy from the business entity, which authorizes the signer to sign the relevant documents on behalf of the firm or company.	D4							
5	The position with regard to Black Economic Empowerment (a valid B-BBEE contribution Level Certificate)/ evidence of exemption/Documentary evidence of B-BBEE participation envisaged in sections 21 and 22 of Annexure A.	D5							
6.1	Company profile or Curriculum Vitae, with specific mention of contract management support, including copy of ID's of partners	D6							

7 See B	6.2	Curriculum Vitae of Contract Manager	D7							
	6.3	Curriculum Vitae of at least two staff members with experience who can fulfil the contract	D8 & D9							
		Track record regarding the execution of similar contracts. (At least two similar previous completed contracts with the same or higher value must be referred to in order to establish past track record of the firm).	T2.2 Page 2							
	8	A certified copy of the latest audited financial statements.	D10							
	9	Proof of Public Liability Insurance (Amounts).	D11							
	10	Proof of Residence	D12							
	11 See C	List of current contracts and duration thereof.	T2.2 Page 3							
	12	Tenderer/Human resource department to provide the company manual regarding training and skills development.	D13							
		RESPONSIVENESS (✓ OR X)								

Tenders did conform the terms, conditions and specifications of the request for tenders.

PROJECT:

TICK SHEET

CHECK FOR RESPONSIVENESS - PARTNERSHIP / JOINT VENTURE

	DESCRIPTION	Page Reference	1	2	3	4	5	6	7
A	Tenderer's Questionnaire - T2.2 page 1	T2.2 page 1							
B	Schedule of three recently completed projects of similar kind and value - T2.2 page 2	T2.2 page 2							
C	Schedule of projects currently under construction - T2.2 page 3	T2.2 page 3							
D	Schedule of Proposed Subcontractors - T2.2 page 4	T2.2 page 4							
E	Certificate of attendance at compulsory clarification Meeting T2.2 page 5	T2.2 page 5							
F	Proof of Registration with CIDB - T2.2 page 6	T2.2 page 6							

G	Record of Addenda to Tender Documents T2.2 page 7	T2.2 page 7							
H	Proposed Amendments and Qualifications - T2.2 page 8	T2.2 page 8							
I	HDI Equity (T2.1 Addendum)	T2.1 Addendum							
J	Returnable Schedules (Annexure E) - T2.3	T2.3 Annex E							
1	An original valid tax clearance certificate issued by the South African Revenue Services (SARS) of each partner/joint venture.	E1							
2	Either and original cancelled cheque or stamped letter from the bank, verifying the banking details. (A designated bank account will be opened and finalized upon the JV appointment.)	E2							
3	A certified copy of the original business registration documents.	E3							
4	A certified copy from the business entity, which authorizes the signer to sign the relevant documents on behalf of the firm or company.	E4							
5	The position with regard to Black Economic Empowerment (a valid B-BBEE contribution Level Certificate)/ evidence of exemption/Documentary evidence of B-BBEE participation envisaged in sections 21 and 22 of Annexure A.	E5							
6.1	Company profile or Curriculum Vitae, with specific mention of contract management support, including copy of ID's of partners	E6							

7 See B	6.2	Curriculum Vitae of Contract Manager	E7							
	6.3	Curriculum Vitae of at least two staff members with experience who can fulfil the contract	E8 & E9							
		Track record regarding the execution of similar contracts. (At least two similar previous completed contracts with the same or higher value must be referred to in order to establish past track record of the firm).	T2.2 Page 2							
	8	A certified copy of the latest audited financial statements.	E10							
	9	Proof of Public Liability Insurance (Amounts).	E11							
	10	Proof of Residence	E12							
	11 See C	List of current contracts and duration thereof.	T2.2 Page 3							
	12	Tenderer/Human resource department to provide the company manual regarding training and skills development.	E13							
	13	Partnerships/Joint Ventures to attach a Partnership/Joint Venture agreement (The agreement should stipulate Management responsibilities, Profit sharing, Partner's Liabilities/responsibilities, and Management contributions) if applicable. Please note that the profit sharing % will be utilized during the evaluation process.	E14							
RESPONSIVENESS (✓ OR X)										

Tenders did conform the terms, conditions and specifications of the request for tenders.

ADDENDUM A

6.0 ADJUDICATION BASED ON POINTS

Evaluation of Responsive Tenders

Financial Evaluation

Scoring Financial Offers

Score the financial offers of remaining responsive tender offers using the following formula:

$$N_{FO} = W_1 \times A$$

where

N_{FO}

is the number of tender evaluation points awarded for the financial offer
is the maximum possible number of tender evaluation points awarded for the financial offer as stated in the Tender Data.

W_1

A

is a number calculated using the formula and option described in Table F.1 as stated in the Tender Data.

Table F.1: Formulae for calculating the value of A

Formula	Comparison aimed at achieving	Option 1 ^a	Option 2 ^a
1	Highest price or discount	$A = (1 + \frac{(P - P_m)}{P_m})$	$A = P / P_m$
2	Lowest price or percentage commission/fee	$A = (1 + \frac{(P - P_m)}{P_m})$	$A = P_m / P$

^a P_m

is the comparative offer of the most favourable comparative offer.

P

is the comparative offer of the tender offer under consideration.

QS ESTIMATE

Lowest Responsive Financial Tender

Points for Price

Points for Participation Goal

R	-
	90
	10

No	Name of Tenderer	Amount	Points for Price	Points for Quality	Points for Preference	TOTAL	Remarks
		R -					The 4 highest scoring Tenderers' tender documentation were scrutinized in detail.
1		R -					
2		R -					
3		R -					
4		R -					
5		R -					
6		R -					

Additional Remarks:

QUALITY

Definitions for Evaluation Criteria

1	Similar Projects successfully completed (Principal Agent to provide feedback) Refer to document T2.2 Page 2 of 8																					
	<table><tr><td></td><td>No of projects</td><td>Points to be allocated</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>3</td><td>0.50</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>2</td><td>0.3</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>1</td><td>0.2</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>0</td><td>0</td></tr></table> <div>Primary agent or Architect to verify & supply information</div>		No of projects	Points to be allocated	If sufficient proof of no of projects can be provided	3	0.50	If sufficient proof of no of projects can be provided	2	0.3	If sufficient proof of no of projects can be provided	1	0.2	If sufficient proof of no of projects can be provided	0	0						
	No of projects	Points to be allocated																				
If sufficient proof of no of projects can be provided	3	0.50																				
If sufficient proof of no of projects can be provided	2	0.3																				
If sufficient proof of no of projects can be provided	1	0.2																				
If sufficient proof of no of projects can be provided	0	0																				
2	Experience Refer to document T2.2 Page 1 of 8 & 3 of 8																					
	<table><tr><td></td><td>No of projects</td><td>Points to be allocated</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>3</td><td>0.50</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>2</td><td>0.3</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>1</td><td>0.2</td></tr><tr><td>If sufficient proof of no of projects can be provided</td><td>0</td><td>0</td></tr></table> <div>Primary agent or Architect to verify & supply information</div>		No of projects	Points to be allocated	If sufficient proof of no of projects can be provided	3	0.50	If sufficient proof of no of projects can be provided	2	0.3	If sufficient proof of no of projects can be provided	1	0.2	If sufficient proof of no of projects can be provided	0	0						
	No of projects	Points to be allocated																				
If sufficient proof of no of projects can be provided	3	0.50																				
If sufficient proof of no of projects can be provided	2	0.3																				
If sufficient proof of no of projects can be provided	1	0.2																				
If sufficient proof of no of projects can be provided	0	0																				
3	Financial Capacity																					
	<table><tr><td>Letter from financial institution stating financial rating If rating is between A and C</td><td>Points to be allocated</td></tr><tr><td>Letter from financial institution stating financial rating If rating is D or below</td><td>0</td></tr></table> <div>Bank rating from financial institution. Refer to Bank codes for detail of points.</div>	Letter from financial institution stating financial rating If rating is between A and C	Points to be allocated	Letter from financial institution stating financial rating If rating is D or below	0																	
Letter from financial institution stating financial rating If rating is between A and C	Points to be allocated																					
Letter from financial institution stating financial rating If rating is D or below	0																					

	<u>Bank codes/Ratings</u>			For information purposes only.					
	Rating	Indication	Points to be allocated						
	A =	Undoubted for the amount of inquiry	0.50						
	B =	Good for the amount of inquiry	0.50						
	C =	Good for the amount of inquiry if strictly in the way of business	0.50						
	D =	Fair trade risk for the amount of inquiry	0						
	E =	Figures considered too high	0						
	F =	Financial position unknown	0						
	G =	Paper occasionally dishonoured	0						
	H =	Paper frequently dishonoured	0						
Bank rating from financial institution									
TOTAL QUALITY									

PREFERENCE

- 1 **Black ownership**
Refer to adjudication of point as stated in Targeted Procurement table in T1.2 Tenderdata (page 1 of 20)

%	Point
100	5
90-99	4
80-89	3
50-79	2
0-49	1

- 2 **B-BBEE status**
Refer to adjudication of point as stated in Targeted Procurement table in T1.2 Tenderdata (page 2 of 20)

Level	Point
1	2.00
2	1.80
3	1.60
4	1.40
5	1.20
6	1.00
7	0.80
8	0.40

B-BBEE Certificate verified as true by
Date

- 3 **Woman/youth/Disabled**

- 4 **Refer to document T2.1 Addendum**

	100% share holding Points to be allocated	% Shareholding	Total
Woman (The % shareholding to be multiplied with points for 100% shareholding	0.09		
Youth (The % shareholding to be multiplied with points for 100% shareholding	0.08		
Disabled (The % shareholding to be multiplied with points for 100% shareholding	0.08		
Total	0.25		

1	2	3	4	5	6

5	Local		Points to be allocated						
		100km radius of Bloemfontein Campus (Main Campus or South Campus project)	0.25	(Refer to Form of Offer and Acceptance C1.1 Page 1 of 3 and T2.3 Annexure D Item 10)					
		100km radius of QwaQwa Campus (QwaQwa Campus project)	0.25						
	6	Region		Points to be allocated					
		Free State Based	0.25	(Refer to Form of Offer and Acceptance C1.1 Page 1 of 3 and T2.3 Annexure D Item 10)					
7	Training & Skills development		Points to be allocated						
		Valid B-BBEE Certificate (Min contribution)	0.25	(Refer to T2.3 Annexure D Item 12)					
		At 50% completion - successful tenderer to supply proof of certificate)							
		No proof required for this specific project - short contract period							
8	Sub-Contracting to black owned companies		Points to be allocated	% Subcontracted	Total				
		Audited signed agreements	0.50						
		Evidence of agreement attached Addendum_____	Yes	No					
		Evidence of % calculation attached Addendum_____	Yes	No					
		Contractor whom scored 15 points on black ownership is not required to appoint black owned sub-contracting companies							
TOTAL PREFERENCE									
TOTAL QUALITY & PREFERENCE									

RETURNABLE DOCUMENTS T1.1 & T1.2

1 Tenderers Questionnaire

To be validated

2 Schedule of three recently completed projects of similar kind and value

1 Project 1

Varified with

Tel No

Designation

Remark

Does it meet criteria

Yes

No

Project 2

Varified with

Tel No

Designation

Remark

Does it meet criteria

Yes

No

Project 3

Varified with

Tel No

Designation

Remark

Does it meet criteria

Yes

No

3 Schedule of projects currently under construction Refer to T2.2 Page 3 of 8

1 Project 1

Varified with

Tel No

Designation

Remark

Does it meet criteria

Yes

No

Project 2

Varified with

Tel No

Designation

Remark

Does it meet criteria

Yes

No

Project 3

Varified with

Tel No

Designation

Remark

Does it meet criteria

Yes

No

4	<u>Schedule of proposed Subcontractors</u>			
	UFS apporved subcontractor Electrical work		Yes	No
	UFS apporved subcontractor Electrical work		Yes	No
	If no Tender may be disqualified. If not disqualified - The tenderer has tree days from date of notice to submit Vendor registration form at Physical Planning for approval.			
5	<u>Certificate of attendance of Clarification Meeting</u>			
	To be signed by an official/authorized representative from Physical Planning Compulsary - If not tender must be disqualified			
6	<u>Proof of registration with CIDB</u>			
	CIDB grading was qualified in tender advertisment			
	CIDB grading required			
	CIDB grading offered			
	CIDB Grading varivied	Yes	No	
If CIDB grading application was submitted and not yet approved contractor will must submit demonstrable evidence thereof and will then be aduricated according to the UFS Vendor application form.				
7	<u>Record of Addenda to Tender Documents</u>			
	To be varivied			
8	<u>Proposed Amandments and Qualifications</u>			
	If proposed amandments and qualifications is not acceptable to the UFS or changes the essance and vadality of the tender - this will lead to disqualification			
9	<u>Returnable schedules</u>			
	If any of the documentations are not submitted it may be a not-responsive tender and may be disqualified. If documentation is outstanding the tenderer may be notified by E-mail and will then have three working days from date of E-mail to submit such documentation. If not received within three days the tenderer will be a not-responsive tender and will be disqualified			

COST REPORT			
Cost Report	Estimate	Lowest acceptable tender	Tender with highest points (if different)
(Including VAT)			
Tender Price			
Professional Fees (max 18%)			
Unforeseen			
Furniture			
TOTAL PROJECT COST			
APPROVED			