

Iziko Museums Of South Africa
The provision of full Fleet Maintenance and Management Services

Reference: FIN/FLEET/05/2021

SUMMARY OF TENDER



| | |
|--|---|
| Tender Reference Number | FIN/FLEET/05/2021 |
| Description of tender: | IZIKO MUSEUMS OF SOUTH AFRICA INVITES SUITABLY QUALIFIED AND EXPERIENCED SERVICE PROVIDERS TO SUBMIT PROPOSALS FOR THE PROVISION OF FLEET MANAGEMENT SERVICES WITH AN OPERATING MAINTENANCE LEASE, INCLUDING VALUE-ADDED PRODUCTS AND SERVICES TO IZIKO MUSEUMS OF SOUTH AFRICA FOR 5 (FIVE) YEARS. |
| Name of the responsible unit/department | Supply Chain Department |
| Address for submitting bid proposals | 25 Queen Victoria Street Cape Town 8001 |
| Telephone Number | Noluyolo Ngwilikane (SCM) 021 481 3889 |
| Email Address: Supply Chain Management Department | nngwilikane@iziko.org.za & ndonson@iziko.org.za |
| Attention | Ronell Pedro (CFO) |
| Closing date and time for submission | 13 July 2021 at 12:00 |
| Non - Compulsory briefing session date and time | 24 June 2021 at 11:00 |
| Non – Compulsory briefing session Address | 25 Queen Victoria Street Cape Town 8001 – TH Berry |
| Tender box dimensions | (h) 90mm x (l) 400mm x (w) 900mm |

Iziko Museums of South Africa invites suitably experienced service providers to submit proposals for the provision of fleet management services with an operating maintenance lease, including value-added products and services to Iziko Museums of South Africa for five years.

1. Introduction

Iziko Museums of South Africa (Iziko) is a Declared Cultural Institution in terms of the Cultural Institution Act, Act 119 of 1998 (as amended). Iziko is a Schedule 3A public entity and non-profit organisation, partly subsidised by the National Department of Sport, Arts and Culture (DSAC).

Iziko invites proposals for the provision of fleet management services with an operating maintenance lease agreement at a competitive price in support of its ongoing operations. It requires vehicles for short-distance travel, for fieldwork in sometimes remote parts of the country as well as vehicles to transport staff and groups of visitors of the museum. For this lease, travel used for fieldwork will be minimal.

Iziko needs to be satisfied that the new lease will be based on terms that offer value for money and include satisfactory after-sale service.

2. Overview

Iziko's vehicles are used locally for short trips for the most part but some vehicles will be used for long-distance travel. In view of this, the operating costs of vehicles differ considerably.

The core purpose of vehicles for usage on long distances and short trips differs and may include, but is not restricted to the following:

- General transportation of passengers and goods to and from the different museum sites ;
- Vehicles used for conducting maintenance services;
- Vehicles used for fieldwork in remote parts of the country in the Research department

The service provider's role includes conducting an assessment and understanding of the need before issuing quotations.

Iziko requires a single service provider that will provide a full operating maintenance lease for an all-inclusive fleet management solution, whereby Iziko contracts with one entity for all its vehicles and receives one set of report/invoices for the fleet.

Iziko prefers to use one dealership and make of vehicle to simplify servicing, and to seek a discount on the overall cost package. However, service providers are not restricted to a single dealership if alternative brands are available for the type of vehicle required. Dealerships should preferably be based in the Cape Town area, for ease of access to maintenance services for the vehicles.

3. Scope of Work

The service provider shall supply leased vehicles as per requirement specifications (Appendix A). Not all vehicles will be in use daily, with one exception – a minibus, capable of transporting 10 – 14 passengers at a time must be available for short term hire, preferably at 48-hour notice at a fixed daily rate.

- Where the vehicle is owned and maintained by the supplier, all risks and rewards associated with ownership and maintenance remain with the supplier. This shall include sourcing and purchasing of vehicles, vehicle usage, tyre and battery replacement, maintenance costs and disposal and resale risk.
- The fixed monthly rental shall be treated as an operating lease by Iziko.
- All initial quotations provided to Iziko shall include fair wear and tear and Iziko shall not be responsible for costs associated with normal wear and tear.
- Service providers must be bona fide Fleet Management service providers specialising in the provision of full operating maintenance lease of vehicles and be financially capable of handling the account.
- Iziko shall stipulate the vehicle purpose and the service provider must provide support and advice to Iziko to ensure optimal value on a case by case basis as well as for the entire fleet.
- The service provider shall provide Iziko with a full operating maintenance lease contract for the duration of the lease agreement. The maintenance contract must include fixed monthly payments based on a period of usage and kilometres and should allow for the restructuring of vehicle

contracts. Maintenance must include all vehicle maintenance and tyre replacement and must include registration, licensing and delivery costs.

- The service provider must indicate the cost of insurance separately to enable Iziko to make comparative assessments of amounts quoted. If no insurance is provided, that fact must be explicitly stated.
- The provision of a medical kit with the delivery of each vehicle is required.
- The vehicle shall have a lockable fuel cap and be equipped with a suitable jack, wheel spanner, spare wheel and triangles.
- The vehicle must have a local registration number and should be fully registered when delivered
- The service provider shall clearly stipulate what their offer includes and excludes as well as any exclusions from the maintenance contract
- Manufacturer's brochure: The vehicle brochure, containing all important specification and expected fuel usage in the urban cycle and power curve, must be attached to the quote submitted.
- AA Vehicle testing reports are required before delivery
- The successful service provider must supply complete documentation of all new vehicles, including warranty and registration certificates of vehicles at delivery. Vehicle user manuals must be delivered with the vehicles.

4. Service Provider Requirement

Service providers are required to advise Iziko on the vehicles' "fit for Purpose" utilisation and vehicle swapping options. The appointed service provider is also expected to conduct an annual inspection of vehicles to ensure that they are well maintained.

The bidding requirements and stages are summarised in the table below:

| Stage 1 - Pre-Qualification Criteria | Stage 2 - Technical Evaluation Criteria (Functionality) | Stage 3 - Price and B-BBEE Evaluation |
|---|---|--|
| <p>Bidders must submit all documents as outlined in Table 1 below</p> <p>Only bidders that comply with all these criteria will proceed to stage 2</p> | <p>Bidders are required to achieve a minimum of 75%points out of 100 Points to proceed to stage 3 (price and B-BBEE)</p> <p>Refer Table 2 – Required documents to be able to do functionality</p> <p>Refer Table 3 – Point Allocation for Functionality</p> | <p>Bidders that meet the minimum threshold for functionality will be evaluated for preference point scoring as follows, refer Table 4:</p> <p>Price – 80 points B-BBEE – 20 points</p> <p>Note: Price should be inclusive of VAT, disbursements, professional fees and escalation. Refer Appendix A</p> |

4.1 Stage 1 – Compliance Documentation

Note: Failure to supply any of the compliance documents stipulated below may lead to disqualification.

Table 1:

| No | Document Name |
|-----|--|
| 1. | SBD 1 - Invitation to Bid |
| 2. | SBD 3.1 - Pricing Schedule and Appendix A |
| 3. | SBD 4 - Declaration of Interest |
| 4. | SBD 6.1 - Preference points claimed In case of a Joint Venture, an original certified copy of the joint/partnership agreement must be attached (each tax clearance certificate and B-BBEE certificate/sworn affidavit for each company) |
| 6. | SBD 8 - Declaration Of Bidder's Past Supply Chain Management Practices |
| 7. | SBD 9 - Certificate Of Independent Bid Determination |
| 8. | Annexure B - Completed Occupational Health and Safety Agreement |
| 9. | Annexure C - Completed Confidentiality and Non-Disclosure Agreement (Annexure C) |
| 10. | Central Supplier Database (CSD) Report – With <u>supplier number</u> and <u>company details</u> (www.csd.gov.za) with <u>Tax Status Pin</u> |

| | |
|------------|--|
| 11. | Valid B-BBEE Certificate or a Sworn Affidavit as prescribed by the B-BBEE Act, 2003 (Act No. 53 of 2003) as amended and Code of Good Practice |
|------------|--|

5. Stage 2 - Technical Evaluation Criteria

Bidders are expected to have the requisite qualifications, experience and accreditation to provide the service.

The documents required below in **Table 2** will be used for functionality evaluation.

5.1 Required Document for Functionality scoring

Table 2:

| No | Tender Document Name | Document Submitted |
|----|--|--------------------|
| 1. | <p>Provide the following:</p> <ul style="list-style-type: none"> • A signed cover letter accepting Iziko's invitation and acknowledgement of our stated requirements and terms. • A company profile • An executive summary describing how bidders intend to deliver the services and a description of how they are best placed to deliver the required service to Iziko • A proposal demonstrating an understanding of the requirements, and indicating how tasks and deliverables will be carried out as well as clear timelines. The proposal should also indicate details related to administration and any value-added products and services | Document Submitted |
| 2. | <p>Reference Letters from at least three (3) customers for a similar service provided. Contact details of referees must also be provided</p> | |
| 3. | <p>Company audited/certified financial statements. Service providers must provide evidence of their turnover and profitability by submitting their financial statements for the past three (3) financial years.</p> | |
| 4. | <p>Fleet Management Report – the bidder must provide an example of monthly reports which should will details of vehicle registration, service history, details of traffic fines ,as well as GPS and fuel expenditure reports</p> | |
| 5. | <p>Detailed Pricing Schedule: Pricing must be based on leased terms of 60 months and estimated kilometres of between 50000 and 100000 assuming vehicles are returned within contractual parameters and with no excesses or damage exceeding fair wear and tear guidelines.</p> <p>The pricing schedule should contain the following elements:</p> <ol style="list-style-type: none"> 1. Detailed pricing relating to full a maintenance lease 2. The rate and formula to be used for excess kilometre penalties 3. The rate and formula to be used for early termination penalties 4. Pricing related to a fuel card system 5. Pricing of the tracking system proposed 6. Details of pricing of Accident Management services offered 7. Details of pricing of any Fine Management services proposed 8. Pricing related to monthly management reports for services offered each month, including online web reporting fees 9. Pricing related to licence renewal services and 10. Other relevant costs: <ul style="list-style-type: none"> • annual vehicle inspection charges, if any, • cost of AARTO Compliance, if applicable and • any administration fees for any restructure of the agreement <p>Ad-hoc fees over and above the above must also be listed.</p> | |

5.2 Functionality Criteria

A proposal that scores lower than the minimum overall percentage of 75% (375 out of 500) will be; will be regarded as non-responsive and eliminated from further evaluation. All proposals that score 75% (375 points) and more for functionality will be eligible for further evaluation.

Table 3

Scores: 0 - Non Submission; 1 - Poor; 2 - Average; 3 - Good; 4 - Very Good; 5 - Excellent

| Functionality Evaluation Criteria | | Weight | | | | | | | | | |
|--|--------|--------|-------------|--------|--|----|--|----|--|----|------------------------------|
| 1. Proposed Methodology | | 45 | | | | | | | | | |
| <p>Bidders must explain the proposed methodology and are requested to provide a proposal demonstrating an understanding of the requirements, and indicating how tasks and deliverables will be carried out as well as clear timelines</p> <p>The proposal should :</p> <ul style="list-style-type: none"> • specify all details relating to the full maintenance leasing arrangement proposed • include details of a fuel card proposal, if any • include details of a tracking system proposed • include details of any accident management services offered • include details of any traffic fine management services proposed • include details of services related to vehicle licencing and AARTO compliance • include details of any other relevant costs , administration and vehicle inspection processes proposed • provide details of excess kilometre penalty charges, as well as early termination penalties • include cost saving advice and/ or comment on suitability of vehicles for the purposes to be used and • include details of any value added services at no cost to Iziko Museums of South Africa <table border="1"> <thead> <tr> <th>Description</th> <th>Points</th> </tr> </thead> <tbody> <tr> <td>• Project plan submitted contains all elements described above and demonstrates an understanding of the scope of work and project requirements</td> <td>45</td> </tr> <tr> <td>• Project plan submitted and contains at least 50% of the most elements listed above</td> <td>40</td> </tr> <tr> <td>• Project plan not submitted contains less than 50% of the elements listed</td> <td>30</td> </tr> <tr> <td>• Project plan not submitted</td> <td>0</td> </tr> </tbody> </table> | | | Description | Points | • Project plan submitted contains all elements described above and demonstrates an understanding of the scope of work and project requirements | 45 | • Project plan submitted and contains at least 50% of the most elements listed above | 40 | • Project plan not submitted contains less than 50% of the elements listed | 30 | • Project plan not submitted |
| Description | Points | | | | | | | | | | |
| • Project plan submitted contains all elements described above and demonstrates an understanding of the scope of work and project requirements | 45 | | | | | | | | | | |
| • Project plan submitted and contains at least 50% of the most elements listed above | 40 | | | | | | | | | | |
| • Project plan not submitted contains less than 50% of the elements listed | 30 | | | | | | | | | | |
| • Project plan not submitted | 0 | | | | | | | | | | |
| 2. Experience And Performance Capabilities | | 25 | | | | | | | | | |
| <p>Bidders must demonstrate the related experience (fleet management services) and performance capabilities by providing documentary proof in the form of at least three (3) or more reference letters (on the letterhead of the referee and signed by the relevant authority) confirming the period of the contract where similar services were conducted indicating the exact start and end date of each contract.</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Points</th> </tr> </thead> <tbody> <tr> <td>• Seven (7) years and above</td> <td>25</td> </tr> <tr> <td>• Four (4) to seven (7) years</td> <td>20</td> </tr> <tr> <td>• One (1) year to four (4) years</td> <td>15</td> </tr> <tr> <td>• Less than 1 year</td> <td>0</td> </tr> </tbody> </table> | | | Description | Points | • Seven (7) years and above | 25 | • Four (4) to seven (7) years | 20 | • One (1) year to four (4) years | 15 | • Less than 1 year |
| Description | Points | | | | | | | | | | |
| • Seven (7) years and above | 25 | | | | | | | | | | |
| • Four (4) to seven (7) years | 20 | | | | | | | | | | |
| • One (1) year to four (4) years | 15 | | | | | | | | | | |
| • Less than 1 year | 0 | | | | | | | | | | |
| 3. Financial Viability | | | | | | | | | | | |

| | | |
|--|---------------|------------|
| The financial viability of bidders will be assessed to reduce risk to Iziko. Service providers must provide evidence of their turnover and profitability by submitting their financial statements for the past three (3) financial years, together with a declaration that the bidder. | | 20 |
| Description | Points | |
| • Bidder declaration submitted and financial statements indicate a track record of profitable operations in three out of the three most recent financial years | 20 | |
| • Bidder declaration submitted and financial statements indicate a track record of profitable operations in at least two out of the three most recent financial years | 15 | |
| • Bidder declaration submitted and financial statements indicate a track record of profitable operations in at least one out of the three most recent financial years | 10 | |
| • No bidder declaration submitted and/or financial statements do not indicate a track record of profitable operations in at least one out of the three most recent financial years | 0 | |
| 4. Fleet management reports | | |
| Bidders must demonstrate an ability to provide monthly management reports, examples of which must be submitted with the proposal. | | 10 |
| Description | Points | |
| • Good quality reports (relevant information presented in a user friendly format) provided | 10 | |
| • Standard reports provided | 8 | |
| • No reports provided | 0 | |
| Functional Total | | 100 |

6. Stage 3 – Price and B-BBEE Evaluation

Proposals that meet the minimum stipulated threshold for functionality criteria will be evaluated based on preference points as described in the Preference Point System stipulated in the Preferential Procurement Regulations of 2017. The criteria for apportioned and weighted preference points for this tender are as follows: **Appendix A (detailed pricing structure)**

Table 4:

| Preference Point Criteria | | Points Allocation |
|---------------------------|---|-------------------|
| 1. | Price | 80 |
| 2. | Broad-Based Black Economic Empowerment (B-BBEE) | 20 |
| Total Points | | 100 |

7. Summary of general principles

- Iziko will apply the 80/20 preferential points system.
- Iziko applies the provisions of the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and the Regulations of 2017 and the Public Finance Management Act, 1999 (Act No. 1 of 1999).
- The lowest or only proposal received will not necessarily be accepted.
- Iziko reserves the right to withdraw its decision to seek the provision of these services at any time.
- There will be no discussions with any bidder until a final decision has been taken by the Bid Adjudication Committee. Any subsequent discussions shall be at the discretion of Iziko.

8. Reasons For Disqualification

Iziko will disqualify any proposal for any one or more of the following reasons:

- a bidder submits a proposal late;
- a bidder submits a proposal via facsimile or e-mail;

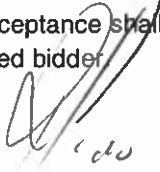
- a bidder submits incomplete documentation and/or information as per the requirements; and
- a bidder submits information that is fraudulent, factually untrue or inaccurate

Any such disqualification may take place without prior notice to the applicable bidder.

9. Formal Contract

The proposal and appended documentation, read together, form the basis for a formal agreement to be negotiated and concluded in a written contract between Iziko and the preferred bidder.

A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred bidder.



Ms Ronell Pedro
Chief Financial Officer

9/6/2021

Date



Ms Rooksana Omar
Chief Executive Officer

9/6/2021.

Date