



TERMS OF REFERENCE

Appointment of a service provider to assist the PSSPF with the tracing of beneficiaries of deceased members of the fund in line with Section 37C of the Pension Funds Act.



1.INTRODUCTION AND BACKGROUND

The Private Security Sector Provident Fund has more than 6000 death claims that need to be processed and monies paid to beneficiaries.

The purpose of this TOR is to have a Service Provider who will assist in tracing these beneficiaries.

2. SCOPE OF WORK

The appointed Service Provider will be required to trace all beneficiaries of a deceased member of the fund.

3.KEY DELIVERABLES

The successful service provider must deliver the following:

- Provide the following details of the beneficiary listings for each deceased member provided to them by the Fund.
- The details should comprise all of the following:
 - a) The most recent active cell-phone number and/or telephone number or that of the guardian in case of minors.
 - b) The e-mail address if applicable
 - c) The postal address.
 - d) The occupation of the beneficiary or guardian
 - e) The relationship that each beneficiary had with the deceased member

4. PRICING

The pricing should be based on how much it costs to provide beneficiary information per deceased member of the fund in line with Section 37C of the Pension Funds Act.

5. DURATION

The duration of the contract shall be negotiable with 90day notice period to either party.

6. PAYMENT OF INVOICES



Payment will be payable in South African Rands, based on an approved price per trace, upon satisfactory delivery of the service, as per the deliverables on paragraph 3. Payments will be affected within 30 days of the submission of an invoice associated with approved deliverables.

7. BID SUBMISSION REQUIREMENTS

Bids must be submitted in the following format:

7.1 Covering letter signed by the Tracing company, inter alia:

- a. Accepting the Rules Bidding (set out in paragraph 9 below)
- b. Providing full contact details of the bidder;
- c. A set of the technical and price proposal
- d. Signed and Fully completed Standard Bidding Documents
- e. A valid BBBEE or EME certificate to claim preference points

7.2 Technical proposal

- a. A detailed plan on how the Company envisages to roll out there tracing of each deceased member's beneficiary/ies cross-referenced to each specified technical evaluation element set out in the technical scorecard (see paragraph 9 below);
- b. The experience in tracing beneficiaries or individuals in the past five years. Their availability to perform the work in the timeframe, substantiated by listing other known professional commitments for each member over the period of the assignment;
- c. Summarized resumés of each proposed team member, highlighting relevant skill and experience in the last five years;

7.3 Price proposal

- a. The price proposal should be based on fee per finalisation of each deceased member of the fund,
- b. Bidders are required to present their bids accordingly. The Bid price should be based on a fee per full completion of a trace or part thereof.

7.4 Requirements

- a. A letter from the Accreditation Regulator in South Africa.
- b. Compliance with the Unemployment Insurance Fund.
- c. Letter of Good Standing from the COIDA.
- d. Original Valid tax clearance certificate.



N.B: (Failure to comply with or provide any of the documents mentioned in clause 7.4 will automatically invalidate your bid)

8. BID EVALUATION

- a. Bids will be evaluated strictly according to the bid evaluation criteria set out below.
- b. Evaluation will be based on a preference points system, as contemplated in the Preferential Procurement Policy Framework Act (PPPFA).
- c. A minimum threshold of 65 % for the technical elements must be scored; otherwise the bid will be regarded as non-responsive and be disqualified. Bids that do not meet or better the technical threshold score of 65 % will not be evaluated further.
- d. Bid proposals will be evaluated in accordance with the **90/10** preference point system, as contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).
- e. The points in respect of price will be calculated on the ceiling price of the bid. The calculation of price points will be done using the prescribed price formula set in the regulations to the PPPFA. The points in respect of functionality will be calculated in accordance with the attached evaluation criteria.
- f. In respect to evaluation matrix, prospective service bidders will be rated from 1 to 5 as follows: 1 = very poor, 2 = poor, 3 = average, 4 = good and 5 = very good. The evaluation criteria will be based but not limited to skills, knowledge and competencies required to undertake the project. In order to ensure meaningful participation and effective comparison, bidders are requested to furnish detailed information in substantiation of compliance to the evaluation criteria.
- g. Each bidder's technical proposal will be evaluated as follows:

Technical scorecard			
	Criteria	Scoring Guide	Weight
1	A detailed plan on how the Company envisages to roll out the tracing of each member's beneficiary/ies.	1 = very poor, 2 = poor, 3 = average, 4 = good and 5 = very good.	20
2	The experience in tracing beneficiaries or individuals in the past five years. Their availability to perform the work in the timeframe, substantiated by listing other known professional commitments for each member over the period of the assignment	1 = very poor, 2 = poor, 3 = average, 4 = good and 5 = very good	20
3	Summarized résumés of each proposed team member, highlighting relevant skill and experience in the last five years;	1 = very poor, 2 = poor, 3 = average, 4 = good and 5 = very good	30
4.	Approach and methodology: <ul style="list-style-type: none"> ▪ Problem conceptualization ▪ Detailed project implementation plan and project approach □ project management skills 	1 = very poor, 2 = poor, 3 = average, 4 = good and 5 = very good	30
	Total points for functionality/ technical points		100
Minimum threshold for technical proposal 65			

9. RULES OF BIDDING/SPECIAL CONDITIONS OF CONTRACT

- 9.1 An original and valid Tax clearance certificates must be submitted by all South African companies submitting bids. Joint Ventures and Consortiums are required to submit separate original and valid tax clearance certificates for each party within the Joint Ventures/ Consortium. N.B. Failure to submit the above, will result in an automatic disqualification of the bidder concerned.
- 9.2 Valid and original tax clearance certificates must be submitted.
- 9.3 Bids must be submitted in South African Rands, on a fixed price basis for the whole duration of the contract.
- 9.4 The cost of preparing bids and of negotiating the contract will not be reimbursed.
- 9.5 The Fund is not bound to accept any of the bids submitted. The Fund reserves the right to withdraw or amend these terms of reference by notice in writing to all parties who have received the terms of reference.
- 9.6 The Fund reserves the right to call interviews with short-listed bidders before final selection.
- 9.7 The Fund reserves the right to negotiate price with the preferred bidder.
- 9.8 Firms may ask for clarification on these terms of reference up to close of business 48 hours before the deadline for the submission of bids.
- 9.9 Any request for clarification must be submitted in writing by email and will be replied to in writing by email: tenders@psspfund.co.za
- 9.10 The Fund reserves the right to return late bid submissions unopened.
- 9.11 The Fund reserves the right not to evaluate bids that are not submitted in the format specified in these terms of reference. Failure to submit the bids in the specified format will invalidate your bid.
- 9.12 Firms may not contact the Fund, on any matter pertaining to their bid from the time when bids are submitted to the time the consultant contract is awarded.
- 9.13 Any effort by a bidder to influence bid evaluation, bid comparisons or bid award decisions in any matter, may result in rejection of the bid concerned.
- 9.14 The deadline for submission of bids is on **7 April 2022 at 16h00**.
- 9.15 The required service must commence one week after appointment letter has been dispatched by the fund.
- 9.16 No incomplete bids, late bids and bids received shall be accepted.

1. Bids must be submitted by email to:

tenders@psspfund.co.za

Bids must be clearly marked: Bid Number: PSSPF4101