



Request for Proposal

Facilities and Property Management

1 Introduction

The South African Institute of Chartered Accountants

The South African Institute of Chartered Accountants (SAICA) is a non-profit organisation that provides a range of services to its more than 28000 members.

SAICA is run by a Board made up of representatives of members and member groupings. The organisation has a full-time secretariat comprising over 130 people and headed up by the Executive President. Its head office is located at Bruma Lake in Johannesburg and has regional offices in Cape Town, Durban and Bloemfontein.

SAICA has many stakeholders. First and foremost, it serves its members; however, it also has commitments to other stakeholders, including government and the community. SAICA therefore employs a wide variety of skills and competencies to deliver its objectives. These include specialist financial skills, training, facilitation, marketing and communication, relationship and stakeholder management, financial and office administration skills among others. SAICA is a key supplier of financial skills to the market. Currently it has over 10 000 trainees serving training contracts and several thousand students at universities around the country. In terms of the Chartered Accountants Designation Act, members of SAICA have the right to use the CA (SA) designation.

For more information about SAICA consult the SAICA website at <http://www.saica.co.za>

1.1 Purpose

The purpose of the request for proposal is to inform short-listed suppliers of the detailed information required (in the form of a proposal) to enable the project team to select preferred suppliers who will fulfil the procurement needs of the Facilities Management Project as set out below:

The purpose of the request for proposal is to identify Facilities Management organisations that would render SAICA with a strong Facilities and Property Management service with sufficient number of competent personnel to perform as outlined below.

A full Facilities Outsource including but not limited to:

- Gardening service
- Office and bathroom cleaning service
- Supply and maintenance of Indoor Water-coolers/Mineral Water
- Management of Kitchen staff
- Security staff
- General Office Maintenance
- Property Management
- Management of the above including management of meeting rooms

A service level agreement (SLA) will be concluded with those Service Providers that can demonstrate their capability and capacity to render SAICA with the relevant services.

Furthermore, the service provider should outline their area of speciality in relation to the above criteria.

1.2 Acknowledgement

It is expected that the supplier will acknowledge receipt of the RFP in writing on their official letter head prior to the Closing date of Supplier Proposals, in this instance Prior to 30 January 2009, failure to do so will disqualify the supplier from the process and no correspondence will be entered into in this regard.

The correspondence should include amongst others:

- Contact name of the supplier
- Telephone number (Telkom line)
- Street address
- City/Town
- Country

1.3 Recipients

The tender process is open to a group of Service Providers within the South African Market that SAICA has dealt with in the past, from small to medium and large suppliers with different areas of speciality in the Service Industry arena.

At present SAICA engages approximately 5 Service Providers, they have been invited to tender for this project.

1.4 Process

The tender process will be undertaken as follows:

Facilities Management Organisations are requested to submit a formal proposal **inclusive of the Signed "Declaration of Interest Bidder Form"** (obtainable via SAICA web-page)

A Tender Review Committee appointed by SAICA will review the supplier proposals against a set of pre-defined criteria and evaluate the supplier on their ability to satisfy the requirements. A shortlist of preferred suppliers will be selected based upon compliance with the formal criteria. The selected suppliers may be required to present their proposal to the Tender Review Committee for clarification purposes. All suppliers who showed interest will be notified of the outcome once the Tender Review Committee has completed the selection process. SAICA and the successful suppliers will then negotiate and agree a final contract, terms and conditions for the delivery of the Facilities Management Function.

SAICA intends using the suppliers as its Preferred Service Provider but reserves the right to use the services of those not on its preferred list should the circumstances dictate so.

SAICA reserves the right to cancel or delay the selection process at any time without providing reasons and it reserves the right not to select any of the respondents to this RFP

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| • Release Tender documentation (RFP) | 5 December 2008 |
| • Release Tender notification local Newspapers | 12 January 2009 |
| • Closure date for supplier proposals | 30 January 2009 |
| • Closure date for receipt acknowledgements | 4 February 2009 |
| • Review of supplier proposals complete | 16 February 2009 |
| • Preferred supplier notified | 24 February 2009 |
| • Unsuccessful suppliers notified | 25 February 2009 |
| • Draft supplier contract formed | 4 March 2009 |
| • Supplier contract signed | 10 March 2009 |
| • Supplier contract initiated. | 16 March 2009 |

1.5 Rules

Formal Service Provider Proposals plus Signed Declaration of Interest Bidder Form should be sent to the following address:

Ms Rumble
SAICA (The SA Institute of Chartered Accountants)
7 Zulberg Close
Bruma
2198

The prospective Service Providers must submit four (4) paper copies and one (1) electronic copy of the proposal. Documents submitted by prospective suppliers will not be returned. E-mail or fax responses are NOT acceptable.

Proposals should reach SAICA by close of business **(16:30) on 30 January 2009**

No extensions for submission of the proposal will be granted. Late submissions, no matter what the cause, will be automatically disqualified.

Questions for clarification of issues will be considered by SAICA up to close of business on 19 January 2009, and must be directed to SAICA's Procurement Coordinator via e-mail to ameliar@saica.co.za

NO verbal requests for information or clarification will be accepted. SAICA does not guarantee to answer all queries. All questions and answers may be made available to all other respondents.

Questions and answers may be posted on SAICA website and will therefore be in the public domain.

Any attempt to gain information on the RFP content and process in a manner deemed to be unfair or disadvantageous to other respondents or any attempt to influence the outcome of the response evaluation will result in immediate disqualification from the RFP process.

All costs associated with any aspect of developing a response to this RFP, including but not limited to collection and delivery, are for the respondent's account.

2 Company

The supplier should provide a brief description of the company profile e.g. BEE status, when was it formed, ownership, directors, staff profile, customers, track record, and history etc

2.1 Background

All suppliers must provide track record details and capabilities to deliver and demonstrate how they intend to meet SAICA's needs and expectations, this will be used by the adjudication panel in the selection process.

The supplier must provide the following detail information in their proposal:

1. Vision and the objectives
2. Size and the location
3. Number of years in operation
4. Number of customers
5. Location of customers
6. Length of customer relationships
7. Customer reference sites.
8. BEE Rating from a recognised certification company e.g. NERA or Empowerdex etc

2.2 Value Proposition (Offering)

The supplier should provide information regarding their company value proposition i.e. what value they would add to SAICA if they are appointed as a preferred supplier i.e. a strong value proposition. The following guideline may be used in this respect:

- Service offered
- Market segments operating within which industry
- Who are the major Competitors?
- Value added services

2.3 Experience

List the information that will provide the project team with a detailed understanding of the experience of the company. The following types of information would be of assistance:

- Number of years in business
- Average length of service of the total staff compliment
- Level of knowledge of industry/ specialist areas
- Level of knowledge of service the supplier provide
- Level of expertise with the service ©

3 Solution

The supplier should demonstrate how they would render service to SAICA based on the needs and requirements of this Tender. The following may be included as examples:

- Take over all Facilities Staff currently on SAICA's books, and outlining how the process will be managed
- The tools to deliver services
- Value Added Services
- Capability to manage SAICA's requirements
- Turnaround time
- Conduct a site survey at SAICA's premises

3.1 Products

- Not Applicable

3.2 Support

List the information required to provide the project team with a detailed understanding of the support offered the supplier. The following types of information may be required:

Products for which support is provided
Types of support provided (e.g. 1st, 2nd, 3rd level support)
Response times (for support provided)
Hours (for support provided)
Organisations (involved in providing support)

4 Implementation

The preferred suppliers will enter into contract with SAICA upon which the date of signing the contract will be the implementation date for the contract.

4.1 Approach

List the information required to provide the project team with a detailed understanding of the approach to be taken by the supplier towards deployment of the products and other deliverables. The following types of information may be required:

- The method for delivery of the products listed
- The activities involved with training, documentation and support
- The activities involved with undertaking other project deliverables.

4.2 Timeframes

List the information required to provide the project team with a detailed understanding of the timeframes proposed by the supplier for the delivery of the solution. The following types of information may be required:

- Likely start and end dates for the delivery of each product and other deliverables proposed within the above solution

4.3 Pricing

The supplier should provide the project team with a detailed understanding of the pricing proposed by the supplier for the delivery of the solution. The following types of information may be required:

- Price of each product and its components
- Price of each set of related products (and any bulk discount applied)
- Any other requisite costs (e.g. management, administration charges etc).

5 Other

SAICA reserves the right to ask for more information that might not have been specified in the Request for Proposal document.

5.1 Confidentiality

It is necessary to request that the supplier explicitly agree to an appropriate 'Confidentiality' clause as detailed below:

- During the course of this tender process you may acquire confidential information relating to our business, project and/or customers.
- You agree to keep this information strictly confidential at all times (even after the project has been completed).
- You will not use or attempt to use it for your personal gain or the gain of any other person
- You may disclose confidential information only to the extent that such disclosure is necessary for the submission of a formal supplier proposal
- This does not apply to information which must legally be disclosed or becomes available to and known by the public.

Note: If the supplier does not agree with the respective clauses, then he/she should explicitly state it within his/her proposal.

5.2 Documentation

Enlist any other information you think is required to provide the project team with the confidence that the supplier can meet the procurement requirements stated within the RFP.

- Product specifications or marketing brochures
- Web site addresses for product listings
- Profiles of staff providing services