

REQUEST FOR PROPOSAL



SAIPATM
■ YOUR WEALTH

REFERENCE NUMBER	SP/113/2021
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE PUBLIC RELATIONS MANAGEMENT SERVICES
CLOSING DATE AND TIME	10 December 2021 AT 11:00 AM
PHYSICAL ADDRESS	SAIPA TM HOUSE, WATERFALL PARK VORNA VALLEY MIDRAND GAUTENG 1685
WEBSITE	www.saipa.co.za

1. INTRODUCTION

SAIPA™ is inviting proposals from potential service providers for the following services:

Description of Services	APPOINTMENT OF SERVICE PROVIDER TO PROVIDE PUBLIC RELATIONS MANAGEMENT SERVICES
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SAIPA™ is one of the leading Accountancy Institutes in South Africa with over 10 000 members and almost 40 years of experience. SAIPA represents qualified Professional Accountants (SA) in practice, commerce and industry, academia and the public sector.

SAIPA™ has been a pioneer in the South African economy, contributing to the advancement of the accountancy profession, influencing legislation and constantly transforming to keep abreast of business, financial and social developments in the country and internationally.

SAIPA™ is based in Midrand, Gauteng with regional representatives spread across the country and remotely interacting with the head office.

2. TERMS OF REFERENCE

2.1. Purpose

- 2.1.1. To build and maintain a positive image of SAIPA and ensure member retention and acquisition, the Marketing and Communication Department requires a reputable and experienced service provider to render a full menu of Public Relations Management services to SAIPA for a period of two (2) years.

2.2. Scope of work

- 2.2.1. Proactively manage the organisation's image by providing strategies to positively promote the organisation;
- 2.2.2. Profile SAIPA and its key personnel and projects in the media;
- 2.2.3. Create a targeted media engagement programme/strategy for the CEO and any other relevant SAIPA spokesperson;
- 2.2.4. Produce and distribute planned media releases and ad hoc reactive media releases;
- 2.2.5. Provide professional writing suited to the targeted media, intended audience, and distribution channel;
- 2.2.6. Continuously monitor editorial features and current affairs in line with relevant non-advertising dependant features;
- 2.2.7. Maintaining media relationships beneficial to the client and content strategy;
- 2.2.8. Coordination of all general media queries including broadcast interview requests;
- 2.2.9. Compilation of press kits from existing content and material;
- 2.2.10. Distribution of media invitations to media and assistance with media relevant product/service launches;
- 2.2.11. Provide media training for SAIPA spokespeople on how to respond to the media and other relevant stakeholders;
- 2.2.12. Provide monthly PR reports mapping out key areas of current and future reputational risks and identify ways to mitigate identified risks;
- 2.2.13. Assisting with Social Media Strategies;
- 2.2.14. Crisis Management;
- 2.2.15. Content creation and visual element support - to be placed on various platforms;
- 2.2.16. Influencer marketing;
- 2.2.17. Provide proposals to implement and manage paid media initiatives.

3. ACCOUNTABILITY AND REPORTING

- 3.1 The appointed service provider will report directly to the Marketing and Communications Manager, for the duration of the contract.

4. CONTENT OF THE BID PROPOSAL

The proposal should include the following:

- 4.1 Company profile and portfolio
- 4.2 Proposed methodology
- 4.3 Proposed project plan with timelines and milestones
- 4.4 List of managers, specialists and assistants together with the *curriculum vitae* of the staff who will be available for the duration of the contract with SAIPA™.

5. FEES AND PAYMENT

- 5.1 The appointed service provider will be paid a monthly retainer for services provided.
- 5.2 The service provider is expected to specify a **monthly retainer fee** to be charged for the scope of work specified in paragraph 2.2 on the provided pricing schedule (SDO2).

6. VALIDITY OF PROPOSALS

- 6.1 The bidder is required to confirm that it will hold its proposal valid for 120 days from the closing date of the submission of proposals, during which time it will maintain without change the personnel proposed for the service together with their proposed rates.

7. APPOINTMENT, COMMENCEMENT AND DURATION

- 7.1 The successful bidders will sign a contract with SAIPA™ which will be valid for Two (2) years, subject to confirmation on a quarterly by the SAIPA™ management committee based on an evaluation of the effectiveness of the service provider.
- 7.2 The successful bidder will have access to all appropriate information of SAIPA™ required to execute the required function within the normal working hours of the organisation.

8. EVALUATION

In broad terms, SAIPA™ will assess proposals based on the technical and financial criteria indicated above, to ascertain value for money, along with any other specific criteria that may be deemed pertinent during the selection process. The success of the bid will be determined by the ability of the firm to competently execute this assignment. The technical and financial components of the written proposal must be submitted in hard copies to the address listed below.

In more specific terms, the following assessment criteria would be used to evaluate proposal:

Phase 1: Compliance

Compliance with administrative requirement stated in the bid documents – at this stage bidders that fail to provide the required information may be disqualified for further evaluation.

- CIPC Company Registration Documents
- Valid original SARS TCS pin or tax clearance certificate
- BBBEE rating certificate issued by a SANAS/DTI accredited rating agency/authority

- Completed and signed SBD forms (SDO1,SDO2,SDO3, SSA1 and SSA2)

Phase 2: Functional Evaluation

The bid/proposal will be evaluated for functionality and rated as follows:

0=Poor, 1=Below Average, 2=Average, 3= Good, 4=Very Good, 5=Excellent

CRITERIA	REQUIREMENT	WEIGHTING
Capability and background	Bidder must provide a business profile and portfolio detailing experience in public relations management as well as providing similar services as detailed in the scope of work.	30
Project Plan and methodology	Bidders must describe the process and methodology that Would be used to develop and implement public relations concepts for a particular campaign and the range of services offered to clients. Bidders must submit one case study of a successful campaign they have implemented.	30
Credentials and Experience	Credentials of the and experience of the team to be allocated to the project, clearly indicating their experience within the PR/Communications field	20
References	Provide at least 3 contactable references where similar work was provided	20
TOTAL		100

Bids that score less than 70% of the points for functionality will be eliminated for further evaluation.

Phase 3: Price and BBEE Evaluation

Should the proposal be successful in the Technical Evaluation, the proposal will then be subject to evaluation based on pricing and B-BBEE criteria.

- Pricing to be done according to the scope of work provided (Monthly Retainer)
- All price quoted should be inclusive of VAT

The following weighting of criteria will be used for the evaluation of the proposals:

Pricing	80 points
B-BBEE Points	20 points

B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-Compliant	0

SAIPA™ reserves the right not to accept any proposal and/or proposal with the lowest price.

8. CONDITION FOR PROPOSALS

- 8.1 In terms of the Protection of Personal Information Act (POPIA), SAIPA has a legal duty to process bidders Personal Information and related details in a lawful, legitimate, and responsible manner.
- 8.2 In order for SAIPA to discharge this duty, bidders hereby grant SAIPA express and informed permission to process the Personal Information submitted in their bid proposals
- 8.3 Proposals received after the set time (11h00) will be disqualified.
- 8.4 The bidder must include a cover letter clearly stating the name of the company and address and telephone number of the bidder's representative.
- 8.5 The bidder shall furnish such additional information that SAIPA™ may reasonably require.
- 8.6 SAIPA™ will not be liable for any cost incurred in the preparation of the proposal.
- 8.7 SAIPA™ may invite bidders for an oral interview/ presentation prior to the approval of a proposal; however, SAIPA™ will not be liable for the costs incurred by the bidder in connection with such interview or presentation.
- 8.8 SAIPA™ will keep the contents of the application strictly confidential.
- 8.9 The information/data provided in this document, together with any subsequent issue of addenda of information/data is given in good faith for guidance of applicants. No warranties or representations are given regarding accuracy or completeness of such information.

9. DOCUMENTS TO BE SUBMITTED

- 9.1 Please complete and submit the following document as part of your proposal:
 - SDO1: Bid coversheet
 - SDO2: Pricing schedule
 - SDO3: Certificate of Independent Bid Determination
 - SSA1: Supplier application form
 - SSA2: Declaration of interests and restrictions

10. SUBMISSION OF PROPOSALS

Bid documents must be submitted by email to quotations@saipa.co.za only.

Closing date: 10 December 2021

Time: 11h00

Submission address: quotations@saipa.co.za

The server only accepts attachments smaller than 10 mb in size

Any enquiries regarding the bidding procedure may be directed to:

Contact Person: Mamosa Maimela
Tel: 011 207 7840
E-mail address: mmaimela@saipa.co.za

Any enquiries regarding technical information may be directed to:

Contact Person: Rochelle Bates
Tel: 011 207 7840
E-mail address: rbates@saipa.co.za

-END-

SDO1 BID COVER SHEET



Reference Number: SP/113/2021
Closing Date and Time 10 December 2021
Description: Public Relations Management Services

Bid documents should be submitted as follows:

All proposals must be submitted electronically to quotations@saipa.co.za

Bidders should ensure that bids are submitted timeously to the correct address. If the bid is late, it will not be accepted for consideration.

All bids must be submitted on the original forms and not re-typed.

Please complete the following information:

1. Bidder's details

Name of bidder	_____
Postal address	_____
Physical address	_____
Telephone number	_____
Facsimile number	_____
Email address	_____
Business registration number	_____
Income tax registration number	_____
VAT registration number	_____

SDO1
BID COVER SHEET



2. Tax Clearance Certificate

Has an original and valid Tax Clearance Certificate, or an electronic access PIN for a valid online Tax Clearance Certificate been submitted? Yes / No

3. B-BBEE Verification

Has a B-BBEE status level verification certificate been submitted? Yes / No

If Yes, who issued the certificate?

- ☐ A commissioner of Oaths
- ☐ A Verification Agency accredited by the South African Accreditation System (SANAS)
- ☐ A BEE Approved Registered Auditor

Signature of Bidder or Representative

Capacity

Date

Any enquiries regarding the bidding procedure may be directed to:

Contact Person: Mamosa Maimela
Tel: 011 207 7840
E-mail address: mmaimela@saipa.co.za

Any enquiries regarding technical information may be directed to:

Contact Person: Rochelle Bates
Tel: 011 207 7840
E-mail address: rbates@saipa.co.za

SDO2 PRICING SCHEDULE



Reference Number: SP/113/2021
Closing Date and Time: 10 December 2021 at 11:00 AM
Description: Appointment of a Service Provider To Provide Public Relations Management Services

Please note:

Offer must be valid for at least 120 days from the closing date of the bid.

Pricing:

Bidders are required to indicate a monthly retainer fee/ amount to be charged based on the scope of services required.

	Amount (R)
Monthly Retainer fee including VAT	

Quoted period

Are the fees quoted fixed for the full period of contract? Yes / No

If the fees are not fixed for the full period, provide details of the basis on which adjustments will be applied for (eg. consumer price index adjustments).

We hereby confirm that these prices are applicable and that this offer will be valid for at least 120 days from the closing date of the bid.

Signature of Bidder or Representative

Capacity

Date

SDO3

CERTIFICATE OF INDEPENDENT BID DETERMINATION



Please note:

1. This document forms part of all bids invited.
2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a *per se* prohibition meaning that it cannot be justified under any grounds.
3. As a nonprofit organisation acting in the interest of our members, we are obliged to take all reasonable steps to prevent abuse of the supply chain management system and will therefore:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the Institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of the contract.
4. This serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
5. In order to give effect to the above, the attached Certificate of Independent Bid Determination must be completed and submitted with the bid.

SDO3

CERTIFICATE OF INDEPENDENT BID DETERMINATION



Certificate of Independent Bid Determination

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by the South African Institute of Professional Accountants ("SAIPA") do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of (Name of Bidder) _____
that:

1. I have read and I understand the contents of this Certificate.
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect.
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder.
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder.
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - a. has been requested to submit a bid in response to this bid invitation;
 - b. could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - c. provides the same goods and services as the bidder and/or is in the same line of business as the bidder.
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraph 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - a. prices;
 - b. geographical area where product or service will be rendered (market allocation)
 - c. methods, factors or formulas used to calculate prices;
 - d. the intention or decision to submit or not to submit, a bid;
 - e. the submission of a bid which does not meet the specifications and conditions of the bid; or
 - f. bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

SDO3

CERTIFICATE OF INDEPENDENT BID DETERMINATION



9. 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.
10. 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 SAIPA for a period not exceeding ten (10) years.

Signature of Bidder or Representative

Name of Bidder or Representative

Capacity

Date

SSA1 SUPPLIER APPLICATION FORM



Thank you for your interest in supplying products and services to SAIPA.

Please complete these forms and provide the requested supporting information specified. From there, your application will be assessed, and if successful, your business entity will be added to our preferred supplier database.

Please take note:

1. Completion of this form does not mean that SAIPA has accepted your business entity as a supplier.
2. Qualifying as a supplier does not necessarily mean that SAIPA will invite your business entity to tender every time SAIPA puts out tenders or requests for quotations.
3. SAIPA will use the information that you fill on this form to pre-qualify your business entity in terms of the criteria stipulated below. This will apply for both existing and new suppliers.
4. SAIPA will treat all the information that you supply with strict confidentiality.
5. SAIPA reserves the right to request additional information or documents regarding answers you provide in this form.
6. SAIPA reserves the right to perform an audit to confirm or check any of the answers that you supply.
7. Please make sure that your CEO or relevant responsible person of the business entity puts his/her signature to this application before you return it to SAIPA.
8. No services should be rendered without an official Purchase Order, as SAIPA will not take any responsibility for the services delivered and may therefore not pay for these services and/or goods delivered.
9. Please respond to all questions in the application as incomplete forms will not be processed.

**The completed documents should please be
marked for the attention of:**

The Financial Manager

and returned by either:

Posting to:

SAIPA, PO Box 2407, Halfway House, 1685

Or delivering to reception, between 8am and 4pm from Monday to Friday, at:

SAIPA House, Howick Close, Waterfall Business Park, Midrand, 1685

SSA1 SUPPLIER APPLICATION FORM



A. General Information

Name of business entity _____

Trading name of entity _____

Primary business activity _____

Postal address of business _____

Physical address of business _____

Telephone number _____

Facsimile number _____

Website address _____

Business registration number _____

Income tax registration number _____

VAT registration number _____

Total years in business _____

Type of entity (please select)

- ☐ Partnership
- ☐ Manufacturer
- ☐ Sole Proprietor
- ☐ Supplier
- ☐ Close Corporation
- ☐ Professional service provider
- ☐ Company
- ☐ Other (specify) _____

SSA1 SUPPLIER APPLICATION FORM



B. Broad-Based Black Economic Empowerment ("B-BBEE") details

Does this business entity have a valid B-BBEE certificate?

Yes / No

If the answer is "Yes", please complete the following information:

Name of measured entity for which
certificate was issued

Relationship of relevant entity to
measured entity stated above

Current level

Issuer of the certificate

Date certificate issued

C. Financial Information

Business entity's turnover over the past 3 years

	Year-end (eg 30 June 2016)	Turnover In Rand
Most recent financial year	<hr/>	<hr/>
Prior financial year	<hr/>	<hr/>
Preceding financial year	<hr/>	<hr/>

Business entity's banking details:

Account holder

Bank

Branch code

Account number

SSA1 SUPPLIER APPLICATION FORM



Account type

- ☐ Current / Cheque
- ☐ Transmission
- ☐ Savings
- ☐ Other(specify)

Please provide contactable customer references

	Customer name	Contact person	Telephone number
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____

D. Human Resources

What is the total full-time staff complement of your business entity?

Management	_____
Other full-time staff	_____
Total	_____

E. Quality Management

Is your business entity ISO 9001:2015 certified?

Yes / No

If you responded "Yes", please provide details:

SSA1 SUPPLIER APPLICATION FORM



F. Products and services

List the primary products or services your business entity can offer:

G. Management and ownership

G.1 Please complete form SSA2 (Declaration of interests), including providing details of all the bidder's directors / trustees / shareholders / members.

G.2 Was the business entity or any of its directors / trustees / shareholders / members convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years? Yes / No

G.3 Was any contract between the business entity and any of its customers terminated during the past five years on account of failure to perform on or comply with the contract? Yes / No

If the answer to G.2 or G.3 was "Yes", please provide further details:

H. Laws and regulations

H.1 Does the business comply with the laws and regulations applicable to it (including the Labour Relations Act, the Occupational Health and Safety Act and the Income Tax Act)? Yes / No

SSA1 SUPPLIER APPLICATION FORM



I. Declaration

I hereby declare that the above information is correct at the time of completion. I certify that I have the appropriate authority to furnish the above-mentioned information on behalf of my employer.

Signature of Authorised Representative

Date

Capacity

Business entity Stamp

Contact Information for your business entity:

Name

Designation

Telephone number

Fax number

Email address

SSA1 SUPPLIER APPLICATION FORM



Checklist of documents to be attached:

- Completed form SSA2 (Declaration of interests)
- Copy of business entity registration certificate
- Original valid Tax Clearance Certificate / SARS electronic PIN
- Certified copy of BBBEE Verification Certificate
- Proof of banking details - cancelled cheque or certificate from bank
- Company profile / corporate brochure

Yes	No	n/a

Where the expected spend for the project/contract will be greater than R100,000, the following additional documents should be provided:

- Proof of registration with professional bodies
- Memorandum of Incorporation/Shareholders Agreement
- Copies of share certificates or other confirmation of shareholding
- Copies of ID's of directors/owners/shareholders
- Financial statements or a letter from accounting officer/auditors certifying annual turnover
- Organogram of the business entity

Yes	No	n/a

SSA2 DECLARATION OF INTERESTS



A. Declaration of interest

Any legal person, including persons employed by SAIPA, or persons having a kinship with persons employed by SAIPA, including a blood relationship, may make an offer or offers in terms of this invitation to supply goods and/or services.

In view of possible allegations of favouritism, should the resulting contract, or part thereof, be awarded to persons employed by SAIPA, or to persons connected with or related to them, it is required that the supplier or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the supplier is employed by SAIPA; and/or
- the legal person on whose behalf the contract is signed, has a relationship with persons who are involved in the evaluation and or adjudication of the contract(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or selection of the supplier.

B. In order to give effect to the above, the following questionnaire must be completed and submitted

Full name of supplier or
representative

Identity number

Capacity / position in business
entity

Business registration number

Income tax registration number

VAT registration number

SSA2 DECLARATION OF INTERESTS



For the following questions, where the answer is “Yes”, please furnish the necessary particulars in Appendix A.

B.1 Are you or any person connected with the supplier presently employed by SAIPA? Yes / No

B.2 Did you or your spouse, or any of the business entity’s directors / trustees / shareholders / members or their spouses conduct business with SAIPA in the previous twelve months? Yes / No

B.3 Do you, or any person connected with the supplier, have any relationship (family, friend, other) with a person employed by SAIPA and who may be involved with the evaluation and or selection of this application? Yes / No

B.4 Are you, or any person connected with the supplier, aware of any relationship (family, friend, other) between any other supplier and any person employed by SAIPA who may be involved with the evaluation and/or select? Yes / No

B.5 Do you or any of the directors / trustees / shareholders / members of the business entity have any interest in any other related companies whether or not they are applying to supply goods or services to SAIPA? Yes / No

B.6 Please provide details of all the bidder’s directors / trustees / shareholders / members:

	Full name	Capacity (eg director)	Identity number
1			
2			
3			
4			
5			

SSA2
DECLARATION OF INTERESTS



C. Declaration

I, the undersigned (Full Name) _____
certify that all the information furnished in this return is correct. I accept that SAIPA may reject the
application or act against me should this declaration prove to be false.

Signature of Supplier or Representative

Capacity

Date

SSA2
DECLARATION OF INTERESTS



Appendix A

Question	Name of person	Position occupied at SAIPA	Other relevant information