TECHNICAL EVALUATION CRITERIA



PROFESSIONAL SERVICES CONTRACT FOR VAALPARK OFFICE SPACE CONVERSION & REFURBISHMENT FOR THE CENTRALEAST CLUSTER

1. INTRODUCTION

This document establishes the standard technical evaluation strategy for the Commercial enquiry to establish a professional services contract for Architectural Services for the refurbishment and conversion of three residential properties into office space. Including the space planning and workspace optimisation in Vaalpark within the CentralEast Cluster (FS & KZN Operating Unit).

2. REVISION HISTORY

Date	Rev.	Compiler	Remarks
November 2023	0	M. Da Côrte Carreira	First issue

3. ABBREVIATIONS & DEFINITIONS

3.1. Abbreviations

Abbreviation	Description
CRA	Concept Release Approval
CADD	Computer-Aided Design and Drafting
cv	Curriculum Vitae
DGN	MicroStation CADD format file
ECSA	Engineering Council of South Africa
PDE	Power Delivery Engineering
PDF	Portable Document Format
SCOT	Steering Committee of Technology
SME	Subject Matter Expert
SACAP	South African Council for the Architectural Profession

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3.2. Definitions

Definition	Description
Mandatory Criteria	Mandatory criteria (gatekeepers) are 'must meet' criteria. These criteria shall not be weighted, or point scored but shall be assessed on a Yes/No basis as to whether the criteria are met. An assessment of 'No' against any criterion shall technically disqualify the tenderer and shall not be further evaluated against Functional Criteria.
Functional Criteria	Bids meeting the Mandatory Evaluation Criteria will be evaluated against the Functional Evaluation Criteria to allocate an evaluation result (score). Only those submissions achieving a score meeting or exceeding the defined threshold will be considered for further processing.
Enquiry Returnable	Items stipulated in the Tender Enquiry, defined as mandatory and functional, to be submitted as part of the tender submission. Also known as evidence.
Non-scoring /Informational Evidence	Additional evidence required either during tender stage or contract award stage which is not scored and will not affect the final score allocated to the submission.
Principal Agent	Principal Agent means the person appointed to fulfil the obligations of the agreed form of contract. 'Contract' in this case 'means an agreement entered into by the Client with a contractor for the execution of the works or part thereof; may also be referred to as the building contract'.
Subject Matter Expert	A subject matter expert, or SME, is the person who possesses a deep understanding of a particular subject. Subject matter experts may have collected their knowledge through intensive levels of schooling, or through years of professional experience with the subject. The SME has a level of understanding regarding their subject that is not common knowledge, making the person quite valuable to an organization.

4. TECHNICAL SCOPE

The development scope of works shall include Architectural Services for the refurbishment and conversion of three residential properties into office space. Including the space planning and workspace optimisation in Vaalpark within the CentralEast Cluster.

The *Consultant's* resources shall be primarily involved in the Concept Design phase, Detailed Design and Execution Phase of the project. The *Consultant* shall provide the following services on request per task order and their scope of work shall involve:

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- 1. Architectural Services:
- 1.1. Registered Architectural Professional for the Principal Agent Role for the project.
- 1.2. Production of architectural concept and detailed design documents, detailed costing, drawings in CADD and pdf format (site plans, elevations, floor plans etc.), finish boards, Life-Cycle Cost Analysis report, etc.
- 1.3. Sustainable designs for the renovated buildings and properties (Energy efficiency, water saving, strategic use of natural light, rainwater harvesting and grey water reuse).
- 1.4. Facilitating the project review meetings.
- 1.5. Coordination and managing of "in-house" or sub-consulted professional services / consultants for the various design disciplines (*Civil Engineering, Geotechnical Engineering, Electrical Engineering and Mechanical Engineering*) and specialised systems and services, as may be required.
- 1.6. Handing over the final design submission to Network Engineering & Design and Project Execution.
- 1.7. Managing the procurement processes and appointment of sub-consulted / sub-contracted Professional Services / Suppliers / Contractors for the Design and Construction of the Warehouse Development for the various disciplines within the requirements of the Eskom Procurement Processes.
- 1.8. Providing technical support during contracting and construction phase of the assigned project. This shall include the various sub-consulted / sub-contracted Professional Services stated, but not limited to the information in point 1.5 above.
- 1.9. Managing and collecting acceptance control data, reviewing, updating, and signing off the As-Built data and drawings at project completion.
- 1.10. Providing final sign-off to put the asset into commercial operation.
- 1.11. Sub-Consulted Professional Services will be as required and may include, but not be limited to the items listed below:
 - 1.11.1. Civil Engineering Services
 - 1.11.2. Electrical Engineering Services
 - 1.11.3. Mechanical Engineering Services

Receivables

The *Employer* shall provide the *Consultant* with the following items:

- 1. All available information that assists in the investigation, scoping, costing and production of packages for the project, in the form of the preliminary project package, i.e. Concept Release Approval (CRA) form, and all other applicable documents.
- 2. High level project schedule specifying the start dates, end dates and other important milestones per activity, included in the project package.
- All other work that does not require Eskom specific equipment and software shall be undertaken at the Consultant's premises using the Consultant's equipment and software.
- 4. The Consultant/s shall be free to pursue other ventures should there not be any project package requiring their attention.
- 5. List of stakeholders with contact details

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6. Site plan

It is advisable that the documents be handed over to the *Consultant*/s in a formal meeting (task order handover meeting), in the presence of key project participants, namely, the Project Coordinator, Senior Design Engineer/s (Civil and Structural Engineer). The Project Coordinator shall be responsible for arranging and coordinating such a meeting. As part of the design process the *Consultant*/s is expected to visit the project site. If latent errors are found on the site plan, the *Consultant*/s shall notify the *Employer*.

Design Tools

The *Consultant* is expected to be in possession of or have access to, but not limited to, the following design tools:

- 1. Microsoft Office or a similar suite of desktop productivity applications.
- 2. The relevant design software as determined by the Consultant, all output files / drawings shall be required to be converted to MicroStation Connect Edition / OpenRoads Designer Connect Edition (*.dgn) or latest version.
- 3. Access to soil analysis laboratory as approved by Eskom
- 4. Subscription and access to Eskom's PDE SCOT Documents Site (https://scot.eskom.co.za/UserLogin.do)
- 5. Printing equipment capable of printing A4, A3, A2, A1 and A0 drawings
- 6. Quality and acceptance control systems (e.g. reports, inspection forms, checklists)
- 7. Cloud facility for file storage, sharing and/or transfer

Deliverables

All work to be done as per Eskom specifications/standards in and deliverables to be submitted to Eskom in MicroStation Connect Edition / OpenRoads Designer Connect Edition (or later) and PDF format. The *Consultant* shall subscribe to Eskom's PDE SCOT Documents Site (https://scot.eskom.co.za/UserLogin.do) to access latest documents, specifications and drawings.

The *Consultant* shall, at minimum, provide the following items or as specified in the task order to the *Employer* on completion of each task order:

- 1. Architectural Design
- 1.1. Concept and Detailed Design including, but not limited, to the following:
 - 1.1.1. Design Reports, including cost estimates, lifestyle costing, etc.
 - 1.1.2. Drawings (Site Plan, Elevations, Floor Plans, Sections etc)
 - 1.1.3. Finish Boards All required building finishes, material specifications, furniture, etc.
- 2. Civil Engineering Services:
- 2.1. Concept and Detailed Design including, but not limited, to the following,
 - 2.1.1. Design Reports, including design philosophy, design criteria, standards and details, design options (at Concept design phase),

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- 2.1.2. Drawings construction drawings and details)
- 2.1.3. Detailed Specifications for Construction
- 2.1.4. Bill of Quantities for Construction
- 2.1.5. Cost Estimate

- 3. Electrical Engineering Services:
- 3.1. Concept and Detailed Design including, but not limited, to the following,
 - 3.1.1. Design Reports, including design philosophy, design criteria, standards and details, design options (at Concept design phase),
 - 3.1.2. Drawings construction drawings and details)
 - 3.1.3. Detailed Specifications for Construction
 - 3.1.4. Bill of Quantities for Construction
 - 3.1.5. Cost Estimate

Project Construction Supervision and Consultation service

Upon acceptance of the detailed design package by the *Employer*, the *Consultant/s* must be available to provide the following services:

- 1. Provide a construction supervision and quality assurance service for the warehouse development, for the entire construction duration.
- 2. Arrange and coordinate pre-tender, squad check, and kick-off meetings immediately prior to construction commencing.
- 3. Arrange and coordinate stakeholders meeting immediately prior to commissioning commencing.
- 4. Arrange and coordinate any ad hoc meetings that may be required by the Employer.
- 5. Arrange, coordinate and provide a consultation service to the appointed Contractors, Eskom Engineering and the Eskom Project Management department at construction and commissioning phases, with the aim of resolving any design related issues that may arise.
- 6. In the event of any identified design problem requiring new revisions of drawings to be issued, the Consultant shall produce such revisions. These new revisions shall be checked and approved by their registered professional.
- 7. Check and verify the checklists and test certificates.
- 8. Arrange and coordinate commissioning of all systems and buildings for commercial operation.

Project Pre-Close-out and Close-out

Upon completion of commissioning, the *Consultant* shall be responsible and accountable for checking of as-built drawings, operation and maintenance manuals, acceptance and quality control data and test certificates for completeness and correctness. All drawings are required to be updated on MicroStation format. dgn and .pdf formats, as per the construction mark-ups and then signed off and filed on ProjectWise as As-Builts. A soft copy and a signed hard copy of updated as-built drawings shall be provided to the *Employer*, in MicroStation Connect Edition / OpenRoads Designer Connect Edition. dgn and .pdf, no later than one calendar month after receiving the marked-up drawings from *Contractor* and *Engineer's Representative*.

On a regular basis (frequency to be determined by the *Employer's Project Manager*), the *Employer* will schedule periodic review of the project to determine the status and progress of

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the project. The *Consultant* shall attend the project review meetings and present their project progress.

All draughting requirements needed to produce detailed designs must be provided by the *Consultant*. All drawings shall comply with the Eskom standard for drawing practises 240-87658920 - Standard Drawing Practice for CAD Users in the Power Plant and Control Plant Technologies Environment and for Electrification Networks. The *Consultant* shall be able to propose an alternate set of draughting standards for Architectural drawing practice for this development. All drawings to be submitted to Eskom Distribution shall be submitted in MicroStation Connect Edition / OpenRoads Designer Connect Edition. dgn and pdf formats.

Eskom will neither check nor approve detailed design package for correctness. The onus lies with the *Consultant/s* to ensure that Eskom receives detailed design package that is free of errors.

Site visits may be required during the detailed design phase for information gathering and verification processes. Sites requiring more than two visits during the detailed design phase shall be subject to the approval of the *Employer*.

5. TECHNICAL STRATEGY

The evaluation strategy and supporting criteria described in the following sections will be used to evaluate qualifying bids.

The technical evaluation process will follow a chronological order which will start with Stage 1, namely mandatory requirements. If all Stage 1 requirements have been satisfied then the evaluation will proceed to Stage 2, which is the evaluation of the predefined functional requirements.

All functional criteria will be scored, and a threshold will be set for stage 2. If the stage 2 threshold is met, then the qualifying bids will be processed further for selection.

6. STAGE 1: MANDATORY CRITERIA AND RETURNABLE

If the Mandatory requirements **ARE NOT MET**, then the evaluation will **NOT PROCEED** further.

If the Mandatory requirements <u>ARE MET</u>, then the evidence will be used for scoring in the Functional Evaluation.

The Tenderer shall comply with the Mandatory requirements are stated in *TABLE 1*, below.

The following evidence must be submitted by the tender closing date.

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TAB	TABLE 1: MANDATORY CRITERIA AND RETURNABLE						
No.	Criteria	Returnable	Further Notes	Minimum Requirements	Compliance Required		
1.	Organogram – Technical Team	1 x <u>Completed and</u> <u>signed</u> Organogram – Technical Team	Refer to Note 2: item no: 1 below	Architectural 1 x Registered Architectural Professional to Manage and Coordinate all Sub- Consultants for all disciplines.	Yes		
2.	Affidavit – Technical Team	1 x Completed and signed Affidavit for each resource listed on the Organogram – Technical Team	Refer to Note 2: item no 2 below	1 x Affidavit per resource	Yes		
3.	Company Experience Register	Completed and signed Company Experience Register/s (ANNEXURE B: PROJECT EXPERIENCE REGISTER RETURNABLE) Signed by the Managing Director/CEO/Owner	Refer to Note 2: 3 below	Company Experience Register/s – for projects completed for a period of maximum of 5 years.	Yes		
		"Completed" means that the company name and other company information are filled in, AND relevant tables in the Consultants Project Experience Register contain information and are not left blank.					

Note 1: MANDATORY CRITERIA AND RETURNABLE

- 1. Key Personnel Organogram Technical Team
- 1.1 Tenders shall submit an Organogram for the complete Technical Team only.

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- 1.2 The Tenderers shall ensure that all the details of the resources on the submitted Organogram Technical team, shall match those of the various submitted Curriculum Vitae, Qualification Certificates, Registration Certificates with the various Statutory bodies e.g. (SACAP, etc.), as well as every Affidavit provided for each resource.
- 1.3 Sub-consulted or sub-contract resources are to be included on the Organogram.
- 1.4 The tenderers can submit the returnable organogram using their preferred layout or format. Tenderers should ensure that the organogram contains/includes the required data as per item 1.5 below.
- 1.5 The submitted organogram shall include full names and ID numbers of the company owner(s), the entire project technical team clearly showing all Principle and Supporting SME's and sub-consulted/sub-contracted team members. Certified copy/ies of ID document/s to be submitted as proof.
- 1.6 Should the detailed information **NOT MATCH**, as required in 1.5 above, the tender submission **SHALL BE DEEMED TO NOT COMPLY** with the mandatory criteria 1 of *TABLE 1: MANDATORY CRITERIA AND RETURNABLE*.
- 1.7 Should the Tenderer not employ staff with the required qualifications, registration or experience, then the Tenderer shall submit a contractual agreement with an organization/s or individual/s which meet the required criteria.
- 1.8 The Technical team listed in the Organogram Technical Team shall only be for the personnel which shall be available for this Contract.
- 1.9 Copies of all qualifications, registration or training certificates and affidavits SHALL BE CERTIFIED by a Commissioner of Oaths CLEARLY LEGIBLE AND CERTIFIED NOT OLDER THAN THREE MONTHS from the date of tender close. The Commissioner's details, with signature and date must be CLEARLY VISIBLE.
- 1.10 Tenderers are to ensure that all copies of technical returnable/s are clear and legible.
 Copies deemed NOT TO BE CLEARLY LEGIBLE will NOT BE ACCEPTED as evidence and will not be accepted.
- 1.11 Important note: If the organogram is not signed by the required signatories as stated in *TABLE 1: MANDATORY CRITERIA AND RETURNABLE*, it will not be accepted as valid evidence.
- 1.12 "Completed" means that the company name and other company information are filled in, AND the Organogram contains relevant information and is not left blank.
- 1.13 Submissions that contain suspected fraudulent evidence will be referred to the appropriate forensic departments for further investigation.



2. Affidavit – Technical Team:

- 2.1 Affidavits shall be submitted for each member of the technical team listed in the Organogram.
- 2.2 Affidavits must be completed and signed to confirm employment of the resources at the tendering company.
- 2.3 The details on the affidavits submitted shall match those of the resources named on the organogram, curriculum vitae, qualifications, training and registration certificates, at the tendering company, during the tender period. Refer to ANNEXURE A: AFFIDAVIT RETURNABLE Template. The affidavit template provided must be used as the returnable.

3. Company Experience Register:

- 3.1 The Tenders shall submit a detailed company related experience register clearly indicating the required data.
- 3.2 Refer to ANNEXURE B: PROJECT EXPERIENCE REGISTER for the relevant template which is to be used as the returnable.
- 3.3 Supplementary information in addition to the register is welcome.
- 3.4 The submitted Company Related Experience Registers should provide a list of successfully **completed** projects for a period of, maximum, 5 years.
- 3.5 The Tenderers Company Related Experience Registers: Shall demonstrate compliance with the requirements of *4 TECHNICAL SCOPE above*.
- 3.6 If the Tenderers Company Related Experience Registers are **not completed and signed**, they will not be accepted as valid evidence.
- 3.7 The Tenderers are welcome to submit multiple pages of the Register template to illustrate the experience required.
- 3.8 "Completed" means that the company name and other company information are filled in, AND relevant tables in the Company Related Experience Registers contain relevant information and are not left blank.

7. STAGE 2: FUNCTIONAL CRITERIA AND RETURNABLE

The evidence will be assessed, and scores will be allocated accordingly. There are no part marks allowed.

Note that the stipulated criteria do not represent the full extent of services required for the execution of the development scope of works. The full requirements must be fulfilled if a Task Order is awarded.

The minimum threshold is set at 75%.

Copies of all training certificates and affidavits shall be submitted. The copies shall be certified by a Commissioner of Oaths clearly legible and not older than three months from the date of tender close. The Commissioner's details, with signature and date must be clearly visible.

The functional criteria will consist of 3 main sections and each section will be weighted as per the *TABLE 2*, below.

	TABLE 2: SUMMARY OF FUNCTIONAL CRITERIA SECTIONS AND WEIGHTING				
No.	Description	Weights			
1	Key Personnel	60%			
2	Related Company Experience	40%			

The following evidence must be submitted by tender closing date.

7.1. KEY PERSONNEL

The Tenderer shall comply with the Functional Criteria as stated in TABLE 3, below.

No Criteria	Returnable	Evidence Notes	Quantity	Weight and Scoring
1. Architectural Project K Personnel	Curriculum Vitae of the following Discipline Specific Key Personnel: 1. 1 x Registered Architectural Professional to Manage and Coordinate all Consultants for all disciplines. AND Identity Document of Resource AND Qualifications of the Resource AND Professional Registration of the Resource (Certified copy of Registration Certificate Required) AND Affidavit per resource	Refer to note 2, item 1 below	Minimum: 1 Resource as stated	Architectural Qualifications: 35% NQF LvI 5 = 3; NQF LvI 6-7 = 4.5; NQF LvI 8-9 = 5. Professional Registration:30% P. Arch. Draught = 4; P. Arch. T or P.S. Arch. T = 4.5; P. Arch. = 5. Relevant Discipline Experience: 35% ≥ 5 years = 5; < 5 years = 4.

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Note 2: FUNCTIONAL CRITERIA AND RETURNABLE - KEY PERSONNEL

- 1. Key Personnel
- 1.1 Tenderers shall provide the following information in their tender submission in relation to each listed key personnel:
- 1.1.1 Curriculum Vitae for each of the resources listed in the Organogram including the following information.
 - 1.1.1.1 Related Experience: Project data for the number of Projects Completed (Discipline Specific)
 - 1.1.1.2 Brief Description of Project size, complexity and budget per listed project.
 - 1.1.1.3 Qualifications: e.g. Accredited National Certificate / National Diploma (ND) / Bachelor of Architectural Studies (BAS & BAS (Hons)), National Higher Diploma, B/M Tech. Architecture / Bachelor of Architecture / Master of Architecture.
 - 1.1.1.4 Proof of Professional Registration with industry Statutory Bodies: e.g. The South African Council for the Architectural Profession (SACAP).
- 1.1.2 Affidavit: Affidavit submitted must be completed and submitted as confirmation of employment of the resources named on the certificates, at the tendering company, during the tender period.
 Refer to ANNEXURE A: AFFIDAVIT RETURNABLE Template. The affidavit template provided must be used as the returnable.
- 1.1.3 Should the Tenderer not employ staff with the required qualifications, registration or experience, then the Tenderer shall submit a contractual agreement with an organization/s or individual/s which meet the required criteria.
- 1.2 The listed personnel are as follows:
- 1.2.1 Architectural
 - 1 x Registered Architectural Professional to Manage and Coordinate all sub-Consultants for all disciplines.
- 1.3 Tenderers shall ensure that all the information submitted for the Key Personnel shall match the data submitted in the Organogram and in the various Curriculum Vitae, Qualifications and Professional Registration Certificate submitted.
- 1.4 Copies of all training certificates and affidavits SHALL BE CERTIFIED by a Commissioner of Oaths CLEARLY LEGIBLE AND CERTIFIED NOT OLDER THAN THREE MONTHS from the date of tender close. The Commissioner's details, with signature and date must be CLEARLY VISIBLE.
- 1.5 Tenderers are to ensure that all copies of technical returnable/s are clear and legible. Tenderers are to ensure that all copies of technical returnable/s are clear and legible. Copies deemed NOT TO BE CLEARLY LEGIBLE will NOT BE ACCEPTED as evidence and will not be accepted.
- 1.6 Tenderers shall not modify the template forms / tables in any manner. Only the relevant data is to be populated in the template forms / tables (refer to templates provided in the various Annexures at the end of this document.

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1.7	Submissions that contain suspected frauduler forensic departments for further investigation.	nt evidence	will b	be referred	I to the	appropriate
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7.2. RELATED COMPANY EXPERIENCE

The tenderer is required to demonstrate that they have the following related work experience. **TABLE 4**, *below*, lists required experience requirements that will be evaluated.

0	Criteria	Returnable	Evidence Notes	Quantity	Weight and Scoring
	Architectural	1 x Architectural Project	1 x Completed Register	Related projects	No of Projects: 60%
	Projects of Related Scope of Works	Experience Register		over a period, maximum, 5 years	>10 = 5;
		Signed by the Managing			9-6 = 4;
		Director/CEO/Owner			≤ 5 = 3.5
		"Completed" means that the company name			Project Size: 40%
		and other company			Leasable Area:
		information are filled in, AND relevant tables in			>500m² = 5;
		the Consultant/s Company Related			250m² - 500m² = 4.5;
		Experience Register contain information and are not left blank.			<250m² = 4

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Note 3: RELATED COMPANY EXPERIENCE

- 1. Related Company Experience:
- 1.1 The Tenders shall submit a detailed company related experience register clearly indicating the following data for a period of, maximum, 5 years.
 - 1.1.1 Project data such as the Project Title, Brief Project Description
 - 1.1.2 Brief Description of Project Complexity and Size (m² of leasable area)
 - 1.1.3 Overall Contract Values of each listed Contract
 - 1.1.4 Client Current Contact Details for each listed related project.
- 1.2 Only projects of related a related scope of works as detailed in 4 TECHNICAL SCOPE, shall be considered. Projects not related to the relevant scope of works shall not be used for scoring and shall affect the final scoring.
- 1.3 If the Tenderers Company Related Experience Registers are not signed, they will not be accepted as valid evidence.
- 1.4 Refer to ANNEXURE B: PROJECT EXPERIENCE REGISTER RETURNABLE for the required template which is to be used as the returnable. The required evidence must be contained in the Company Related Experience Registers.
- 1.5 "Completed" means that the company name and other company information are filled in, AND relevant tables in the Company Related Experience Registers contain relevant information and are not left blank.

8. APPROVAL OF TECHNICAL EVALUATION CRITERIA AND STRATEGY

Name	Designation and Department	Signature	Date
Andre Damons	Manager Design, Civil & HV Lines Network Engineering and Design	Don	30 Nov 2023
Mboniseni Dhlamini	Manager Project Services	Medai	30 Nov 2023
Preshnee Chetty	Manager, Design Engineering Network Engineering and Design	#Thetty	30/11/2023

ANNEXURE A: AFFIDAVIT RETURNABLE

Affidavit Confirming Employment of Resource

I,	(full names),
ID Number:	
hereby confirm that I am currently employed at:	
	(Tendering Company Name).
I solemnly declare that all the information contained h	nerein is true.
Signature of Employee:	
Sworn to/Affirmed before me at	
on this the day of	(month & year).
Commissioner of Oaths/Justice of Peace:	
(Commissioner's details with signature and date)	

No	Project Name	Project Category (Related Projects Only)	Scope	Project Value	Project Size (Leasable Area m²)	Client	Client Contact Details (Contact Person and Contact number)	Client Contract Number
EG	XXXXXXX	Architectural Project;	Residential Building Renovation	R350 000 (planed)	250m²	JOE SOAP DEVELOPERS	+27 XX XXX XXXX	XXXXXXXXXX

DECLARATION: I hereby confirm that the tools and equipment list above is a true reflection of the tools and equipment owned or hired by my Company. I will also ensure that all tools and equipment will be enough to cater for multiple full teams.

Signature of Managing Director / Chief Executive Officer / Owner*	Date:	
Company Managing Director / Chief Executive Officer / Owner* Name:	Tendering	
(*underline which is applicable)	Company:	