

TERMS OF REFERENCE

Supply and Distribution of Incentives



NACOSA

PROJECT	Supply and Distribution of incentives for the Global Fund AYP Programme		
REFERENCE	CFP-02-AYP-08-2023	DATE	29 August 2023
SUMMARY	NACOSA seeks the services of a company to supply and distribute incentives to beneficiaries participating in the My Journey Programme. The incentives will form one part of the retention strategy and distributed to the implementing organisations nationally.		
QUESTIONS	Questions can be addressed by email only to Queries@nacosa.org.za with the reference in the subject line. Questions may be submitted on or before 15 September 2023		
BRIEFING SESSION	There will be no briefing session.		
DEADLINE	13h00 on Tuesday, 26 September 2023		
DOCUMENTS	<ol style="list-style-type: none">1. Terms of Reference2. Annex 1: Bidding Form3. Annex 2: Branding4. Annex 3: Pricing template5. Global Fund Code of Conduct for Suppliers		

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1. INTRODUCTION

NACOSA is a network of over 1,500 civil society organisations working together to turn the tide on HIV, AIDS and TB in South Africa. NACOSA promotes dialogue, builds capacity with accredited training, mentoring and technical assistance and channels resources to support service delivery on the ground, particularly among key populations and women and girls.

As a principal recipient of the Global Fund and in partnership with USAID and PEPFAR and the Departments of Health, Education and Social Development, NACOSA works at all levels – from international agencies and national government, right through to sub-district services and small community groups. NACOSA acts as a bridge between people and health and social services.

2. BACKGROUND

NACOSA is responsible for delivering comprehensive age appropriate biomedical behavioural and structural services to Adolescent Young People (AYP), aged 10-24 years, to prevent HIV transmission. The main programme element is for ALL beneficiaries to be reached with the core service package. In this period the programme aims to incentivise 36,951 AYP in communities of:

- Mitchells Plain sub-district of the City of Cape Town District (Western Cape);
- Klipfontein sub-district of the City of Cape Town District (Western Cape);
- Tshwane 1 sub-district of Tshwane District (Gauteng);
- Sol Plaatje Sub-district of the Frances Baard District (Northern Cape);
- Fetakgomo-Greater Tubatse sub-district of the Greater Sekhukhune (Limpopo);
- Dihlabeng sub-district of Thabo Mofutsanyane (Free State);
- Nyandeni sub-district of Oliver Tambo District (Eastern Cape);
- Nelson Mandela C sub-district of Nelson Mandela Bay Metro (Eastern Cape);
- Rustenburg sub-district of Bojanala Platinum (North- West);
- Govan Mbeki sub-district of the Gert Sibande District (Mpumalanga);
- Mbombela sub-district of the Ehlanzeni District (Mpumalanga);
- uMhlatuze sub-district of the King Cetshwayo District (KwaZulu- Natal);
- AbaQulusi sub-district of Zululand (KwaZulu- Natal)

To be most effective, the Programme requires AYP to fully participate in the programme to ensure maximum benefit however, attracting and retaining AYP on the programme has been found to be a challenge.

Figure 1 demonstrates five different strategies aimed at enhancing retention of AYP reached via the programme. Incentives are one of the core strategies.

Figure 1: Types of Retention Strategies



3. SPECIFICATIONS

NACOSA requires a service provider to supply and deliver **6000** Orphans Vulnerable Children (OVC) Packs, **15 622** Health Packs and **6137** Male Sexual Partner (MSP) health packs. A combination of the packs will need to be delivered to NACOSA’s partner organisations across South Africa. The contents of each of the packs are listed in Table 1 ,2 and 3 below.

Table 1. List of OVC Pack

ITEM NO.	ITEM DESCRIPTION
1	Face cloth (30cm x 30cm AB Collection)
2	Bar of soap (non-perfumed 100gr)
3	Toothpaste (125ml Close up deep action)
4	Toothbrush (Colgate, standard head, medium)
Quantity required: 6000 All of the products should be packaged together in a large clear zip-lock bag	

Table 2. List of health Pack

ITEM NO.	ITEM DESCRIPTION
1	Face cloth (30cm x 30cm AB Collection)
2	Bar of soap (non-perfumed 100gr)
3	Roll-on deodorant (Mum 100ml fragrance free, antiperspirant)
4	Body lotion: Vaseline intensive care, 100mls
5	Plastic Comb/ brush
6	Toothbrush (Colgate, standard head, medium)
7	Toothpaste (125ml Close up deep action)
Quantity required: 15 622 All of the products should be packaged together in a large clear zip-lock bag	

Table 3. List of MSP health Pack

ITEM NO.	ITEM DESCRIPTION
1	Face cloth (30cm x 30cm AB Collection)
2	Bar of soap (non-perfumed 100gr)
3	Roll-on deodorant (Mum 100ml fragrance free, antiperspirant)
4	Body lotion: Vaseline intensive care, 100mls
5	Toothbrush (Colgate, standard head, medium)
6	Toothpaste (125ml Close up deep action)
7	White Bucket Cap (for Males), <i>Bucket Cap Material: Cotton</i> <i>Size: Large/ One size fit all – 59cm</i> <i>Embroidered Eyelets</i> <i>The branded message must be in the front centre of the bucket cap</i> <i>Branded message = I know my status</i> <i>Branding type: Stick on</i> <i>Branding must be written in RED</i> <i>NACOSA logo (in NACOSA colours)</i> <i>(The bucket caps must be branded using bold headings font in accordance to the branding guidelines provided in Annex 2),</i>
Quantity required: 6137	
All of these products should be packaged together in a large clear zip-lock bag	

NB. No substitutions will be allowed for items were a specific brand name and specification is used.

4. BIDDING REQUIREMENTS

The successful bidder should have:

- Legal status recognised to work in South Africa, enabling the organisation to perform the above-mentioned tasks.
- Demonstrated ability to deliver quality products at a reasonable cost and per delivery schedule.
- Good administration and project management ability.
- The bidder must provide at least 3 relevant contactable references for providing similar goods. The references should include the name of the customer, the nature of the goods/services that were provided and the contact's name, telephone number and email address of the reference.
- Details of the courier company that will be used supported by at least one (1) reference from courier company confirming the quality of the business relationship with the bidder. The

reference should include the name of the company, contact name, telephone number and email address of the reference.

Only submissions that meet the technical specifications in all aspects as stipulated in these terms of reference will be considered.

Delivery of Incentives

The incentives must be delivered as per the delivery schedule in **Annex 1**, but for it to be effectively and efficiently stored, items will need to be boxed. The bidder should provide specific information on how the goods will be packaged for delivery to ensure that adequate plans can be made for storage. Bidders to provide the dimensions of the box sizes and how many units can fit into each box.

Branding

In terms of the branding for items listed under specifications, the standardised programme branding and full colour logo must be visible on each item. Branding guidelines are provided as **Annex 2**.

5. PROJECT PLANNING

Bidders may choose to bid for one geographic area or all geographic areas. This should be clearly specified in the bidder's proposal. Also, bidders are required to submit their bid providing a project plan that includes the following components:

- Clearly explain how each stock item will be sourced.
- Clearly explain what the lead time is for the ordering and arrival of each stock item.
- Clearly explain the lead time for the completion of branding.
- Proof that your company has adequate capacity to handle the volumes of items in this tender.
- Clearly explain the approach to delivery to site – use of couriers, name of courier company(ies) that have been previously used.
- Clearly specify the box size – how many units can be stored in each box and the weight. This will inform storage capacity at the site where it will be delivered.
- Very clear timeline on the delivery of the items to the sites specified. The timelines provided in the bidding process will be used as the basis for contracting. Bidders should provide realistic timelines as the contract will have penalty clauses for late delivery.

6. PRICING INSTRUCTIONS

Bidders are required to provide detailed pricing for each service to be provided using the template in **Annex 3** and adhere to the following instructions:

- The tendered total of the prices should be inclusive of (if any) all rates and taxes, **excluding** Value Added Tax (VAT); in South African Rand currency
- Provide fixed rates and prices for the duration of the contract that are not subject to adjustment unless otherwise agreed upon by both the bidder and NACOSA.
- All prices tendered must include all expenses, disbursements and costs (e.g. transport, accommodation etc.) that may be required for the execution of the tenderer's obligations in terms of the Contract, and shall cover the cost of all general risks, liabilities and obligations set forth or implied in the Contract as well as overhead charges and profit (in the event that the tender is successful). All prices tendered will be final and binding.
- The services offered should conform to NACOSA's specifications.

See **Annex 1** for a list of sites where the incentives should be delivered and for a breakdown of the quantity needed per site.

7. SUBMISSION OF BIDS

Bidders may choose to bid for one geographic area or all geographic areas. This should be clearly specified in the bidder’s proposal. Interested companies should submit their bid with the following documents.

All submissions must in the format of Annex 1 – Bidding Form, any deviations from this format will invalidate the bid.

DOCUMENTS

	ITEM	<input checked="" type="checkbox"/>
1.	Completed Invitation to Bid Form	
2.	Company Profile	
3.	PIN for Tax clearance certificate verification (<i>verification will be done with SARS eFiling</i>)	
4.	Valid B-BBEE Certification	
	<ul style="list-style-type: none"> • Copy of a certificate from a SANAS accredited Verification Agency OR • A signed Exempt Micro Enterprise (EME) affidavit with the required information¹ OR • A signed Qualifying Small Enterprise (QSE) affidavit with the required information². Any EME or QSE is only required to obtain an affidavit on an annual basis, confirming: <ul style="list-style-type: none"> – Annual Total Revenue of R10 Million or less for EME or between R10 Million and R50 Million for QSE. – Level of Black Ownership <p>ANY MISREPRESENTATION IN TERMS OF THE ABOVE CONSTITUTES A CRIMINAL OFFENCE AS SET OUT IN THE B-BBEE ACT AS AMENDED.</p>	
5.	Completed and Signed Declaration of Interest	
6.	Signed Code of Conduct for Suppliers of services related to Global Fund financing (sign each page): https://www.nacosa.org.za/2017/03/14/code-of-conduct-for-suppliers	
7.	Annex 3: Pricing template	
8.	Project Plan	
9.	Reference letters	
10.	Supporting documents applicable for a Company or CC :	
	<ul style="list-style-type: none"> • Certified copy of Company Registration Document that reflect Company Name, Registration number, date of registration and list of active Directors or Members. • Certified copy of ID documents of the Directors or Members. • Most recent year’s financial statements showing comparative figures. • Confirmation of Banking Details not older than 3 months, by means of a stamped letter from the bank or bank statement. 	
11.	Supporting documents for a Sole Proprietorship :	

¹ http://www.thedtic.gov.za/wp-content/uploads/BEE_Affidavit-EME-Gen.pdf

² http://www.thedtic.gov.za/wp-content/uploads/BEE_Affidavit-QSE-Gen.pdf

	<ul style="list-style-type: none"> • Certified copy of ID documents of the Owner • Most recent year’s financial statements showing comparative figures • Confirmation of Banking Details not older than 3 months, by means of a stamped letter from the bank or bank statement. 	
12.	Samples	

Sample of Products

The samples of each item, as per the specifications, must be addressed to NACOSA’s office address: **NACOSA**, 3rd Floor, East Office Tower, Canal Walk, Century Boulevard, Century City, 7441. The package must be addressed for attention to NACOSA Supply Chain Management with the reference number and the bidders name.

8. EVALUATION CRITERIA

Only submissions that meet the technical specifications in all aspects as stipulated in this term of reference will be considered. Evaluation will be split into 3 stages:

EVALUATION STAGE 1: CORRECTNESS AND COMPLETENESS

Bidders must provide the above documentation as specified. NACOSA reserves the right to reject any tender submission found to be incomplete or illegible. Non-submission of the following documents will lead to immediate disqualification:

- Tax Compliance Certificate
- Samples
- Detailed quotation and project plan
- Declaration of interest

EVALUATION STAGE 2: TECHNICAL EVALUATION

Once the proposals have been evaluated on Correctness and Completeness, an evaluation panel will allocate points (on a points scale specified per function) according to the criteria set out in the functionality table below.

Bidders must obtain a minimum of 70 percent out of 100 to be shortlisted. Shortlisted bidders will be evaluated on Price & B-BBEE.

FUNCTION	RATING	WEIGHTING
INDUSTRY EXPERIENCE		25%
Demonstrable organizational maturity and stability shown by organization’s age. NB This is the operational entity delivering on these terms of reference.	<p>The organisation has been trading for a number of years.</p> <p>1 point: 0 - 1 year</p> <p>2 points: 2-3 years</p> <p>3 points: 3-4 years</p> <p>4 points: 4- 5 years</p> <p>5 points: > 5 years</p>	25%
KNOWLEDGE AND SKILLS		20%

FUNCTION	RATING	WEIGHTING
<p>Bidder’s proposal portraying clear understanding and meeting the scope of requirements and includes:</p> <ul style="list-style-type: none"> • Detailed price quotation with project plan • Sample quality • Defined value-adds provided by the bidder <p>Compliance of product with specifications</p>	<p>Scoring criteria:</p> <p>Unacceptable: Insufficient information provided. Proposal does not meet the requirements (1 point)</p> <p>Poor: Considerable reservations on bidders’ relevant abilities and understanding of requirements (2 points)</p> <p>Average: Average demonstration of relevant ability, understanding of requirements and ability to provide realistic timelines (3 points)</p> <p>Good: Satisfactory and above average level of understanding, relevant ability to meet requirements and ability to provide realistic and acceptable timelines (4 points)</p> <p>Excellent: Exceptional demonstration of relevant ability and understanding of requirements with value added benefits (5 points)</p>	<p>20%</p>
CAPACITY TO DELIVER		15%
<p>Delivery Schedule</p> <ul style="list-style-type: none"> • The bidding organization must provide a realistic and acceptable timeline that provides detail on how long it shall take to deliver all items to the specified destinations. 	<p>1 point: Clear timeline given with the ability to deliver within five (5) weeks or later</p> <p>2 points: Clear timeline given with the ability to deliver within four (4) weeks</p> <p>3 points: Clear timeline given with the ability to deliver within three (3) weeks</p> <p>4 points: Clear timeline given with the ability to deliver within two (2) weeks</p>	<p>15%</p>
CONTACTABLE REFERENCES		40%
<p>Contactable references: provide reference letters from recent or existing clients not older than 5 years clearly detailing services provided on the clients’</p>	<p>0 points: no reference letters</p> <p>1 point: 1 reference letter</p> <p>2 points: 2 reference letters</p> <p>3 points: 3 reference letters</p>	<p>25%</p>

FUNCTION	RATING	WEIGHTING
letterhead with contact details including email.	4 points: > 3 reference letters	
Demonstrated relationship with a courier company to support the delivery plan to all sites <ul style="list-style-type: none"> <i>Contactable/ verifiable references, in a letter format, must include tender/project details, telephone or cell phone numbers, email address and contact names.</i> 	0 Points = No 5 Points = Yes	15%
MAXIMUM ACHIEVABLE POINTS		100%

EVALUATION STAGE 3: PRICE

Bidders whose quotations meet the specifications as detailed in this Terms of Reference will be evaluated on price. Bids that do not quote on all of the required items will be excluded from the process. Also, bidders who do not submit a valid B-BBEE certificate or valid affidavit will be regarded as non-compliant and thus score zero (0) points for Broad-Based Black Economic Empowerment.

Preference Point system applicable to this bid is 80/20 (PPS)

A maximum of 80 points is allocated for price on the following basis:

CRITERIA	NUMBER OF POINTS
Price	80
B-BBEE	20
Total Points	100

Price points calculation formula as follows:

The calculation for price points will be conducted as follows:

$$PS = P \left[\frac{1 - (Pt - Pmin)}{Pmin} \right]$$

Where:

PS = Points scored for comparative price of tender/offer under consideration

P = Maximum points

Pt = Comparative price of tender/offer under consideration

Pmin = Comparative price of lowest acceptable tender/offer. Points scored will be rounded-off to the nearest 2 decimal places.

B-BBEE points calculation as follows:

B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

9. TIMEFRAMES

Please be advised the dates below are indicative and subject to change.

ACTION	RESPONSIBLE	DATE
Deadline for Submission of questions	Service Provider	15 September 2023
Responses to questions	NACOSA	18 September 2023
Proposal submissions	Service Provider	26 September 2023
Successful bidder appointed	NACOSA	31 October 2023

10. TERMS AND CONDITIONS

Invitation not an offer

This tender serves an invitation to facilitate a requirement-based decision and not an offer to do business with NACOSA.

Bid Validity

The prices quoted shall remain firm for a period of at least 90 days after the closing date of this tender.

Language

The tender submission prepared by the bidder including correspondences and documents relating to the tender shall be written in the English language.

Preparation Costs

The bidder shall be responsible for all its costs incurred in preparing, submitting and presenting any response to this bid and all other costs incurred by it throughout the bidding process.

Due Diligence

NACOSA reserves the right to conduct due diligence on the prospective bidder prior to final award of the contract. This may include site visits, requests for additional information and presentations.

Discretion

NACOSA reserves the right to accept or reject any tender and to cancel the tendering process and reject all tenders at any time, whether before or after the closing date of the tender without attracting any liability. Also, NACOSA is not bound to accept the lowest price(s) quotation and may at its discretion award the tender to more than one bidder