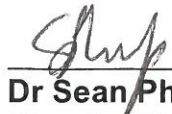


Steps in Commissioning an Evaluation by DPME

Step No	SCM step	Activity	Documentation	Timing
1.		Evaluation approved in National Evaluation Plan	Approved National Evaluation Plan	November
2.		Evaluation Steering Committee (ESC) established	Draft TORs for ESC	January
3.		Evaluation Steering Committee starts drawing up TORs and approves TORs for the Steering Committee.	Approved TORs for Evaluation Steering Committee Minutes of ESC	January/ February Week 1
4.	L	Request for proposal – SCM issues reference number within 1 working day.		Week 1
5.		CFO approves Bid Specification Committee (BSC) – minimum of 3 – through signing off the ESC TORs	ESC TORs (SCM A2.3a if changes needed)	Week 1
6.	K	Evaluation Steering Committee meets as Bid Specification Committee (BSC) and approves TORs. At the meeting all members must sign confidentiality forms and form SCM A2.3b as members of the BSC. CFO signs SCM 2.3b. All ESC present sign supply chain code of conduct.	Confidentiality Forms Minutes of SC Approved TORs SCM 2.3b Supply Chain Code of Conduct	Week 2
7.		Suitable members of evaluation panel selected by Evaluation Steering Committee based on the competence grouping they fall under	List of evaluation panel service providers to invite	Week 2
8.	I	CFO approves bid documents including dates (SCM 2.3c) Call sent out by SCM including appropriate PPFA documents (90/10 if over R1m, 80/20 if under R1m)	SCM2.3c Copies of email to evaluation panel members	Week 2 (2 days after ESC approves TORs and list of SPs)
9.	G	Compulsory briefing of those invited to bid (date in TORs) – aim for at least 6.	Minutes and attendance register	Week 3 (5 days after call)
10.		Bids submitted to SCM including original tax clearance and BBEE certificate (unless previously submitted and still valid) CFO approves additional Evaluation Committee Members if required (SCM 2.3d)	Bids opened only after closing SCM 2.3d if required	Week 5-6 (2-3 weeks after briefing depending on complexity)
11.	C	SCM compiles list of bidders and compliance checklist and enters PPFA data for those passing the minimum quality threshold (SCM G3.1)	Bid documents	Week 5-6 (immediate)
12.	E D	ESC meets as Bid Evaluation Committee (BEC). Presentations by service providers followed by selection. Participants sign confidentiality documents if not previously signed, and individuals sign and complete scoresheets. SCM enters scores into spreadsheet and then prints the scoresheets which are signed by the BEC members.	Signed confidentiality forms Minutes Attendance register Completed spreadsheet SCM G3 Signed printouts from the spreadsheet	Week 6-7 (3 days after submission date)

Step No	SCM step	Activity	Documentation	Timing
13.	C A	SCM checks any outstanding documents (hopefully none outstanding at that point)		Hopefully none
14.		If you don't want to appoint the obvious winner, SCM compiles submission re bid process to CFO for approval (SCM A2.4). (BEC members to sign submission if scoresheets not signed in step 12)		Within 3 days of BEC meeting
15.	A	SCM informs the successful bidder and informs all panel members on the award (without price information until SLA signed)	Letter of award	Week 6-7 (2 days after selection)
16.		Inception briefing meeting of ESC with successful bidder to discuss methodology and provide additional information to enrich the proposal (date included in TORs so SP aware).	Minutes	Week 7-8 (week following award)
17.		Draft SLA submitted by ERU to successful bidder. Includes revised TORs based on inception briefing. Bidder responds with comments.	Draft SLA	Week 8
18.		Successful service provider (SP) submits revised proposal as well as inception report indicating changes made		Week 8 (allow 5 days from briefing meeting)
19.		ESC meets to approve inception report and changes to methodology/ proposal. Meeting either: (a) Approves inception report and changes to proposal, or (b) Requests further changes, after which it meets again to approve (c) Decides that it is not confident that the SP is capable of undertaking the work the inception report is not approved and no SLA will be signed..The project is cancelled.	Inception report Revised proposal Revised deliverables Minutes Attendance register	Week 7 or 8 (2 days after submission)
		If ESC satisfied with changes and wishes to proceed		
20.		SLA signed (by Head ERU; also DDG OME if >R1m; CFO, SP)	Final SLA	Week 8
		Request for purchase order made by ERU to accompany the SLA (Head ERU or DDG OME sign). Purchase order issued including purchase order number directly to the company by SCM, copied to ERU applicant.	Purchase request Purchase Order	Week 8 (day SLA signed)
21.		Once the Inception Report is approved, the SP issues first invoice to SCM in the first instance (usually for 10%).. Budget manager (and if necessary Head ERU) signs invoice.	Invoice 1 Payment request	Week 8 or 9 (immediately purchase order issued)
22.		SP paid		5 days from receipt of approved invoice
23.		Work on the evaluation commences		

Step No	SCM step	Activity	Documentation	Timing
24.		Subsequent invoices handled as in 19-21.		
25.		After final invoice is paid ERU completes supplier satisfaction form.	Supplier satisfaction form	



Dr Sean Phillips
Director General

The Presidency: Performance Monitoring and Evaluation

Date: 11/12/2012