### MICROSOFT CRM SOFTWARE DEVELOPMENT SYSTEM AND MAINTENANCE SUPPORT FOR A PERIOD OF 36 MONTHS RFB40111

#### DEVELOPMENT THROUGH PARTNERSHIP

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<tr>
<th><strong>BID/RFQ NUMBER:</strong></th>
<th>RFB40111</th>
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</thead>
<tbody>
<tr>
<td><strong>COMPULSORY BRIEFING:</strong></td>
<td>12 JANUARY 2016</td>
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<tr>
<td><strong>CLOSING DATE:</strong></td>
<td>31 JANUARY 2016</td>
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<td><strong>CLOSING TIME:</strong></td>
<td>11:00 AM</td>
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<td><strong>BID VALIDITY PERIOD:</strong></td>
<td>90 days (commencing from the RFB Closing Date)</td>
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#### DESCRIPTION OF BID:
MICROSOFT CRM SOFTWARE DEVELOPMENT AND MAINTENANCE SUPPORT FOR A PERIOD OF 36 MONTHS

#### BID DOCUMENTS DELIVERY ADDRESS:
SABS Campus; Block N & R; 2 Dr Lategan Road; Groenkloof; Pretoria; 0001

For Attention: Mr Ulizwi Mngoma

NB: Bidders must insert the bids into the Tender Box situated at Reception, which is accessible from 08:00 to 16:30 during weekdays.

<table>
<thead>
<tr>
<th><strong>NAME OF BIDDER</strong></th>
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<tr>
<td><strong>CONTACT PERSON</strong></td>
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<td><strong>EMAIL ADDRESS</strong></td>
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<td><strong>TELEPHONE NUMBER</strong></td>
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<tr>
<td><strong>FAX NUMBER</strong></td>
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<td><strong>BIDDER’S STAMP</strong></td>
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<tr>
<th><strong>BID PRICE</strong></th>
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CONTENT

PART 1: THE TENDER

Part 1.1: Tendering procedures
1.1.1 Tender notice and invitation to bid (SBD1)

Part 1.2: Returnable documents
1.2.1 Checklist of returnable documents and schedules
1.2.2 Compulsory Questionnaire
1.2.3 Returnable schedules and documents

PART 2: THE CONTRACT

Part 2.1: Agreements and Contract data (To be signed with the winning bidder)
2.1.1 Form of offer and acceptance
2.1.2 Contract data
   1. The Contract (General and Special Conditions of Contract)
   2. Schedule of Deviations

Part 2.2: Scope of work
2.2 Scope of work

Part 2.3: Pricing data
2.3.1 Pricing Instruction
2.3.2 Pricing schedule
INVITATION TO BID

The cidb is a schedule 3A public entity established in terms of cidb Act, 38 of 2000, to provide leadership to stakeholders and to stimulate sustainable growth, reform and improvement of the construction sector for effective delivery and the industry’s enhanced role in the country’s economy. Experienced and Interested service providers are hereby invited to bid for the following:

<table>
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<tr>
<th>Bid No</th>
<th>RFB40111</th>
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<tbody>
<tr>
<td>Bid Description</td>
<td>MICROSOFT CRM SOFTWARE DEVELOPMENT SYSTEM AND MAINTENANCE SUPPORT FOR A PERIOD OF 36 MONTHS</td>
</tr>
</tbody>
</table>

Compulsory Clarification Meeting
Date: 12 JANUARY 2016
Time: 11:00
Venue: cidb Head Office, SABS Campus Block N&R, 2 Dr Lategan Road, Groenkloof, Pretoria

Evaluation Method
Two-staged evaluation [1. Functionality; 2. Price and BEE (80/10)]

Functionality Evaluation Criteria
Functionality will be evaluated and scored out of 100 points.
Bidders shall score a minimum of 70 evaluation points on functionality in order to move on to the next stage where they will be evaluated on Price and B-BBEE

<table>
<thead>
<tr>
<th>Quality criteria</th>
<th>Subcriteria</th>
<th>Maximum number of points</th>
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</thead>
<tbody>
<tr>
<td>METHODOLOGY</td>
<td>Approach Paper (Please provide a detailed project plan emphasising on the project roll over and lead times.) REFER TO TABLE B</td>
<td>40</td>
</tr>
<tr>
<td></td>
<td>Submit proposed SLA for the solution (turnaround times)</td>
<td>15</td>
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<tr>
<td>TENDERER’S EXPERIENCE</td>
<td>Experience in dealing with Corporate and/or Public Sector clients clearly demonstrating CRM and SharePoint development. (Please provide company profile demonstrating the company’s experience)</td>
<td>20</td>
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<tr>
<td></td>
<td>A minimum of 10 years is required in order to get maximum number of points</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>&lt;10 years = 0 points</td>
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<tr>
<td></td>
<td>A sliding scale of 5 points per contactable reference will be used to award points based on positive feedback. (Provide at least three(3) contactable clients)</td>
<td>15</td>
</tr>
<tr>
<td>KEY PERSONNEL EXPERIENCE</td>
<td>Experience of key personnel in information technology projects of a similar nature. (please provide CV’s illustrating the key personnel’s experience)</td>
<td>15</td>
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<td></td>
<td>A minimum of five (5) years’ experience in Key Accounts Management.</td>
<td>5</td>
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<td>&lt;5 years = 0 points</td>
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<tr>
<td></td>
<td>A minimum of five (5) years’ experience as a Developer.</td>
<td>5</td>
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<td>&lt;5 years = 0 points</td>
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<tr>
<td></td>
<td>A minimum of five (5) years’ experience as a Database administrator.</td>
<td>5</td>
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<td>&lt;5 years = 0 points</td>
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<td>PRESENTATIONS</td>
<td>Presentations to cidb will be done by shortlisted bidders at their premises and the cidb team will evaluate both the site and presentation against the information provided by the bidders in their tender document.</td>
<td>10</td>
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<tr>
<td>Maximum possible score for quality (M&lt;sub&gt;s&lt;/sub&gt;)</td>
<td>100</td>
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B-BBEE
Failure to submit BBBEE certificate and the accompanying fully completed and signed Standard Bidding Document (SBD 6.1) will result in the bidder not qualifying for claiming for preferential points.

Pre-qualification Criteria
In order to be eligible for evaluation bidders must:
1. Submit all compulsory returnable schedules and valid returnable documents

Enquiries
Name: Mr Ulizwi Mngoma
Email: ulizwm@cidb.org.za
Tel: 012 482 7368
Fax: 086 686 9142

Bid Closing
Date: 31 January 2016
Time: 11:00 am
Venue: cidb Head Office; SABS Campus Block M and R; 2 Dr Lategan Road; Groenkloof
NOTE
Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, shall not be considered.
For verification, cidb reserves the right to conduct site visits and interview officials whose CVs have been submitted as part of this bid.
Late, Faxed or emailed bids or part thereof, shall not be considered.
CHECKLIST OF RETURNABLE SCHEDULES AND DOCUMENTS

Please adhere to the following instructions

- Tick in the relevant block below, the documents and schedules that form part of your response
- Ensure that the following documents are completed and signed where applicable:
- Use the prescribed sequence in attaching the annexes that complete the Bid Document
- Should all of these documents not be included, the bidder may be disqualified on the basis of non-compliance/ non-responsiveness

YES | NO
---|---

THE BID / REQUEST FOR QUOTATION RETURNABLE SCHEDULE OR DOCUMENT

- Invitation to Bid
- SBD2: Valid and original Tax Clearance Certificate
- Pricing schedule as per proposal
- SBD4: Declaration of Interest form
- SBD6.1: Preference Claim Forms in terms of Preferential Procurement Regulations AND accredited and Valid BEE certificates. SBD6.1 must be completed when claiming for BEE points.
- SBD8: Declaration of Bidder’s Past Supply Chain Practices
- SBD9: Certificate of Independent Bid Determination
- Record of Addenda issued to bidders before the bid closing date (To be completed only if cidb issued addenda)
- Annexure A: Certified copies (Copy with original stamp) of your CIPC company registration documents listing all members with percentages, in case of a CC or Pty
- Annexure B: Certified copies of South African Identity Documents or Valid Passports of Members. Directors / owner (In a case of a sole proprietor or Partnership)
- Annexure C: Certified copies (Copy with original stamp) of all latest share certificates, in case of a company
- Annexure D: A partnership letter/ Partnership agreement (In case of a Partnership)
- Annexure E: A Joint Venture Agreement in case of a Joint Venture
- Annexure F: List of traceable references of previous and present clients, (Company name, department, branch, contact person with office telephone number, website and email address)
- Annexure G: Relevant Academic Qualifications, CV’s of key personnel and Company Profile

YES | NO
---|---

THE CONTRACT

- Pricing Data (Pricing Instruction and Pricing Schedule)
- Scope of Work (with Special Declarations)
- Annexure G: General Condition of Contract (must be downloaded from cidb website: http://www.cidb.org.za/Tenders/Pages/Useful-Documents.aspx

For cidb Witness

Bidder Witness
RETURNABLE DOCUMENTS AND SCHEDULES

CERTIFICATE OF AUTHORITY FOR SIGNATORY

Indicate the status of the tenderer by ticking the appropriate box hereunder. The tenderer must complete the certificate set out below for the relevant category, and attach their Registration Certificates for Companies, Close Corporations and Partnerships, or Agreements and Powers of Attorney for Joint Ventures, or ID documents to the page provided at the end of this form.

<table>
<thead>
<tr>
<th>(I) COMPANY</th>
<th>(II) CLOSE CORPORATION</th>
<th>(III) PARTNERSHIP</th>
<th>(IV) JOINT VENTURE</th>
<th>(V) SOLE PROPRIETOR</th>
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(I) CERTIFICATE FOR COMPANY

I, ......................................................chairperson of the Board of Directors of ............................................ hereby confirm that by resolution of the Board (Copy attached) taken on ........... 20......, Mr/Ms acting in the capacity of, was authorized to sign all documents in connection with the tender for Contract No............... and any contract resulting from it, on behalf of the company.

Chairman:

As Witnesses: 1. _________________________________

2. _________________________________

Date: _________________________________

(II) CERTIFICATE FOR CLOSE CORPORATION

We, the undersigned, being the key members in the business trading as ..........................................................hereby authorize Mr./Ms ............................................................ acting in the capacity of, to sign all documents in connection with the tender for Contract No ............... and any contract resulting from it, on our behalf.

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<th>NAME</th>
<th>ADDRESS</th>
<th>SIGNATURE</th>
<th>DATE</th>
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Note: This certificate is to be completed and signed by all of the key members upon whom rests the direction of the affairs of the Close Corporation as a whole.
(III) CERTIFICATE FOR PARTNERSHIP

We, the undersigned, being the key partners in the business trading as hereby authorize Mr./Ms…………………………… acting in the capacity of …………………………… to sign all documents in connection with the tender for Contract No ……………………………. and any contract resulting from it, on our behalf.

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<th>NAME</th>
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Note: This certificate is to be completed and signed by all of the key partners upon whom rests the direction of the affairs of the Partnership as a whole.

(IV) CERTIFICATE FOR JOINT VENTURE

We, the undersigned, are submitting this tender offer in Joint Venture and hereby authorize Mr/Ms …………………………… authorized signatory of the company, acting in the capacity of lead partner, to sign all documents in connection with the tender offer for Contract No ……………………………. and any contract resulting from it, on our behalf. This authorization is evidenced by the attached power of attorney signed by legally authorized signatories of all the partners to the Joint Venture.

<table>
<thead>
<tr>
<th>NAME OF FIRM</th>
<th>ADDRESS</th>
<th>AUTHORIZING SIGNATURE, NAME AND CAPACITY</th>
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Note: This certificate/Agreement is to be completed and signed by all of the key partners upon whom rests the direction of the affairs of the Partnership as a whole.

(V) CERTIFICATE FOR SOLE PROPRIETOR

I, ___________________________________, hereby confirm that I am the sole owner of the business trading as ________________________

Signature of Sole owner:
As Witnesses:
1. ______________________
2. ______________________
**RECORD OF ADDENDA TO TENDER DOCUMENTS**

We confirm that the following communications received from the Employer before the submission of this tender offer, amending the tender documents, have been taken into account in this tender offer:

<table>
<thead>
<tr>
<th>Date</th>
<th>Title or Details</th>
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SIGNATURE: ……………………………………………………..  DATE: ………………..
(of person authorized to sign on behalf of the Tenderer)
TAX CLEARANCE CERTIFICATE

TAX CLEARANCE CERTIFICATE REQUIREMENTS

It is a condition of bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

2 In order to meet this requirement bidders are required to complete in full the attached form TCC 001 “Application for a Tax Clearance Certificate” and submit it to any SARS branch office nationally. The Tax Clearance Certificate requirements are also applicable to foreign bidders/individuals who wish to submit bids.

SARS shall furnish the bidder with a Tax Clearance Certificate that shall be valid for a period of one (1) year from the date of approval.

3 The original Tax Clearance Certificate must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate shall result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate shall not be acceptable.

4 In bids where Consortia / Joint Ventures / subcontractors are involved, each party must submit a separate Tax Clearance Certificate.

5 Copies of the TCC 001 “Application for a Tax Clearance Certificate” form are available from any SARS branch office nationally or on the website www.sars.gov.za.

6 Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers shall need to register with SARS as eFilers through the website www.sars.gov.za.
ATTACH ORIGINAL AND VALID TAX CLEARANCE CERTIFICATE ON THIS PAGE
**Purpose**

Select the applicable option ......................................................... Tenders  Good standing

If "Good standing", please state the purpose of this application

---

**Particulars of applicant**

Name/Legal name  
(Initials & Surname or registered name)

Trading name  
(if applicable)

ID/Passport no  
Company/Close Corp. registered no

Income Tax ref no  
PAYE ref no 7

VAT registration no 4

SDL ref no L

Customs code  
UIF ref no U

Telephone no  
E-mail address

Physical address

Postal address

---

**Particulars of representative (Public Officer/Trustee/Partner)**

Surname

First names

ID/Passport no  
Income Tax ref no

Telephone no  
E-mail address

Physical address

---

For club  Witness

Bidder  Witness
Particulars of tender (If applicable)
Tender number: 
Estimated Tender amount: R
Expected duration of the tender: 

Particulars of the 3 largest contracts previously awarded

<table>
<thead>
<tr>
<th>Date started</th>
<th>Date finalised</th>
<th>Principal</th>
<th>Contact person</th>
<th>Telephone number</th>
<th>Amount</th>
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Audit
Are you currently aware of any Audit investigation against you/the company? 

IF "YES" provide details

Appointment of representative/agent (Power of Attorney)
I the undersigned confirm that I require a Tax Clearance Certificate in respect of Tenders or Goodstanding.
I hereby authorise and instruct: to apply to and receive from SARS the applicable Tax Clearance Certificate on my/our behalf.

Signature of representative/agent: 
Date: CCYY-MM-DD

Declaration
I declare that the information furnished in this application as well as any supporting documents is true and correct in every respect.

Signature of applicant/Public Officer: 
Date: CCYY-MM-DD

Name of applicant/Public Officer: 

Notes:
1. It is a serious offence to make a false declaration.
   (a) fails or neglects to furnish, file or submit any return or document as and when required by or under this Act; or
   (b) without just cause shown by him, refuses or neglects to
      (i) furnish, produce or make available any information, documents or things;
      (ii) reply to or answer truly and fully, any questions put to him …
As and when required in terms of this Act. shall be guilty of an offence …
2. SARS shall, under no circumstances, issue a Tax Clearance Certificate unless this form is completed in full.
3. Your Tax Clearance Certificate shall only be issued on presentation of your South African Identity Document or Passport (Foreigners only) as applicable.

For club Witness Bidder Witness
DECLARATION OF INTEREST

Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

1. the bidder is employed by the state; and/or

1.2 the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(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 adjudication of the bid.

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

2.1 Full Name of bidder or his or her representative: …………………………………………………………
2.2 Identity Number: ………………
2.3 Position occupied in the Company (director, trustee, shareholder²): ………………………………………
2.4 Company Registration Number: …………………………………………………………………………………
2.5 Tax Reference Number: ………
2.6 VAT Registration Number: ………
2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.
2.7 Are you or any person connected with the bidder presently employed by the state? YES / NO
2.7.1 If so, furnish the following particulars:
Name of person / director / trustee / shareholder/ member: …………………………………………………
Name of state institution at which you or the person connected to the bidder is employed:
………………………………………………………………………………………………………………………
Position occupied in the state institution: ………………………………………………………………………
Any other particulars: ……………………………………………………………………………………………
2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? YES / NO
2.7.2.1 If yes, did you attached proof of such authority to the bid document? YES / NO
(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.
2.7.2.2 If no, furnish reasons for non-submission of such proof:
…………………………………………………………………………………………………………………………

2.8 Did you or your spouse, or any of the company’s directors /trustees /shareholders /members YES / NO or their spouses conduct business with the state in the previous twelve months?
2.8.1 If so, furnish particulars:
…………………………………………………………………………………………………………………………

²"Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

²"State” means –
(a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
(b) any municipality or municipal entity;
(c) provincial legislature;
(d) national Assembly or the national Council of provinces; or
(e) Parliament.

Do you, or any person connected with the bidder, have any relationship (family, friend, other) YES/NO with a person employed by the state and who may be involved with the evaluation and/ or adjudication of
2.9.1 If so, furnish particulars.

……………………………………………………………………………………………………
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2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) YES/NO

between any other bidder and any person employed by the state who may be involved with the evaluation and/or adjudication of this bid?

2.10.1 If so, furnish particulars.

……………………………………………………………………………………………………
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2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest YES/NO

in any other related companies whether or not they are bidding for this contract?

2.11.1 If so, furnish particulars:

……………………………………………………………………………………………………
……………………………………………………………………………………………………
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3 Full details of directors / trustees / members / shareholders.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Identity Number</th>
<th>Personal Reference Number</th>
<th>Tax Number</th>
<th>State Employee Number</th>
<th>Employee Persal Number</th>
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4 DECLARATION

I, THE UNDERSIGNED (NAME)________________________________________________________CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

_________________________________________  ______________________________
Signature                                      Date

______________________________  ______________________________
Position                                      Name of bidder

For club  Witness

Bidder  Witness
PPPFA CLAIM FORM

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2011

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:
- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R1 000 000 (all applicable taxes included).

1.2 The value of this bid is estimated to exceed R1 000 000 (all applicable taxes included) and therefore the 90/10 system shall be applicable.

1.3 Preference points for this bid shall be awarded for:
(a) Price; and
(b) B-BBEE Status Level of Contribution.

1.3.1 The maximum points for this bid are allocated as follows:

<table>
<thead>
<tr>
<th>POINTS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>90</td>
<td>PRICE</td>
</tr>
<tr>
<td>10</td>
<td>B-BBEE STATUS LEVEL OF CONTRIBUTION</td>
</tr>
</tbody>
</table>

Total points for Price and B-BBEE must not exceed 100

1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

2.1 “all applicable taxes” includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

2.2 “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad Based Black Economic Empowerment Act;

2.3 “B-BBEE status level of contributor” means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

2.4 “bid” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;

2.5 “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

2.6 “comparative price” means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;

2.7 “consortium or joint venture” means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;

2.8 “contract” means the agreement that results from the acceptance of a bid by an organ of state;

2.9 “EME” means any enterprise with an annual total revenue of R5 million or less.

2.10 “Firm price” means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
2.11 “functionality” means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;

2.12 “non-firm prices” means all prices other than “firm” prices;

2.13 “person” includes a juristic person;

2.14 “rand value” means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;

2.15 “sub-contract” means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;

2.16 “total revenue” bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the Government Gazette on 9 February 2007;

2.17 “trust” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and

2.18 “trustee” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

3. ADJUDICATION USING A POINT SYSTEM

3.1 The bidder obtaining the highest number of total points will be awarded the contract.

3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts.

3.3 Points scored must be rounded off to the nearest 2 decimal places.

3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.

3.5 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.

3.6 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

4. POINTS AWARDED FOR PRICE

4.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

\[
P_{s} = 80 \left( 1 - \frac{P_{t} - P_{\text{min}}}{P_{\text{min}}} \right) \quad \text{or} \quad P_{s} = 90 \left( 1 - \frac{P_{t} - P_{\text{min}}}{P_{\text{min}}} \right)
\]

Where

\[
P_{s} = \text{Points scored for comparative price of bid under consideration}
\]

\[
P_{t} = \text{Comparative price of bid under consideration}
\]

\[
P_{\text{min}} = \text{Comparative price of lowest acceptable bid}
\]
Points awarded for B-BBEE Status Level of Contribution

5.1 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

<table>
<thead>
<tr>
<th>B-BBEE Status Level of Contributor</th>
<th>Number of points (90/10 system)</th>
<th>Number of points (80/20 system)</th>
<th>Bidder’s Score (Mark with an X)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>9</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>8</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>12</td>
<td></td>
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<tr>
<td>5</td>
<td>4</td>
<td>8</td>
<td></td>
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<tr>
<td>6</td>
<td>3</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>2</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Non-compliant contributor</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

5.2 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA’s approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.

5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.

5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.

5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

6. BID DECLARATION

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

7.1 B-BBEE Status Level of Contribution: .............................. = .............................. (maximum of 10 or 20 points)

(Parts claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

8. SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

8.1.1 If yes, indicate:

(i) what percentage of the contract will be subcontracted? .................................................. %

(ii) the name of the sub-contractor? ..........................................................................................

(iii) the B-BBEE status level of the sub-contractor? .................................................................

(iv) whether the sub-contractor is an EME? YES / NO (delete which is not applicable)
9 DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm ____________________________

9.2 VAT registration number ____________________________

9.3 Company registration number ____________________________

9.4 TYPE OF COMPANY/ FIRM

☐ Partnership/Joint Venture / Consortium
☐ One person business/sole propriety
☐ Close corporation
☐ Company
☐ (Pty) Limited
[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES
____________________________________________________________________________________________________
____________________________________________________________________________________________________

9.6 COMPANY CLASSIFICATION [TICK APPLICABLE BOX]
☐ Manufacturer
☐ Supplier
☐ Professional service provider
☐ Other service providers, e.g. transporter, etc.

9.7 Total number of years the company/firm has been in business? ____________________________

9.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

(i) The information furnished is true and correct;

(ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.

(iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;

(iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

(a) disqualify the person from the bidding process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and forward the matter for criminal prosecution

WITNESSES:

1. ____________________________

2. ____________________________

DATE: ____________________________

ADDRESS:

____________________________________

____________________________________

____________________________________
[The tenderers BEE Verification Certificate must be inserted here]
# DECLARATION OF BIDDER’S PAST SCM PRACTICES

1. This Standard Bidding Document must form part of all bids invited.

2. It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

3. The bid of any bidder may be disregarded if that bidder, or any of its directors have:
   a. abused the institution’s supply chain management system;
   b. committed fraud or any other improper conduct in relation to such system; or
   c. failed to perform on any previous contract.

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Is the bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <a href="#">audi alteram partem</a> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury’s website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>4.1.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2</td>
<td>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury’s website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>4.2.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.3</td>
<td>Was the bidder or any of its directors 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?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>4.3.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4</td>
<td>Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>4.4.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

# CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)………………………………………………………..
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

……………………………………………………………………………………………………………………………………………………………………
Signature                                      Date
……………………………………………………………………………………………………………………………………………………………………
Position                                      Name of Bidder
CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This Standard Bidding Document (SBD) must form part of all bids¹ 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).² Collusive bidding is a per se prohibition meaning that it cannot be justified under any grounds.

3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
   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 that contract.

4 This SBD 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 Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.
CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

**Study of grade 1 contractors for cidb**, do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: ____________________________________________

(Name of Bidding Company)

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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 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.
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 the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.................................................................
Signature
.................................................................
Date

.................................................................
Position
.................................................................
Name of Bidder

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

Js914w 2
PERFORMANCE RECORD IN SIMILAR WORK

PLEASE FURNISH US WITH AT LEAST FIVE REFERENCES IN THE BELOW TABLE AS THERE ARE POINTS ALLOCATED FOR EACH REFERENCE

<table>
<thead>
<tr>
<th>EMPLOYER: CONTACT PERSON AND TELEPHONE NUMBER</th>
<th>NATURE OF SERVICE</th>
<th>CONTRACT VALUE (INCLUSIVE of VAT)</th>
<th>DATE COMPLETED OR EXPECTED TO BE COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**SIGNATURE:** ..............................................………….....……...  **DATE:** ...................................
(of person authorized to sign on behalf of the Tenderer)
THE CONTRACT

NOTE:
THE CONTRACT WILL BE ENTERED INTO WITH THE WINNING BIDDER.
THE OFFER IS SUBJECT TO THE SUBMISSION OF THIS BID TO THE CIDB.

CERTIFICATE OF INCORPORATION

REGISTRATION CERTIFICATE / AGREEMENT / ID DOCUMENT (in a case of a Sole Proprietor)

[Important note to Tenderer: Registration Certificates for Companies, Close Corporations and Partnerships, or Agreements and Powers of Attorney for Joint Ventures, or ID documents for Sole Proprietors, all as referred to in the List of Compulsory Returnable Schedules and Documents, must be inserted here]
COMPANY PROFILE (PLEASE ATTACH YOUR COMPANY PROFILE HERE)
SCOPE OF SERVICES / TERMS OF REFERENCE

1. Assignment Objective

The objective for this assignment is to appoint a professional service provider to enhance the existing Construction Registers Service software and to provide maintenance services. The Construction Registers Service system comprises the national Register of Contractors (RoC) and the iTender-Register of Projects (RoP).

The scope of system enhancements relate to improving the functionality on the Registers, support for increased registration outputs, improving quality of registration processes and other development centred on the Construction Registers Service such as best practice assessment schemes. The assignment is for a three year period. The Registers system is built on the Microsoft CRM 2011 version and uses K2 Business Process software and SharePoint 2010. The assignment will include development of an online contractor applications process.

2. Client’s / employer’s objectives

The cidb is a Schedule 3A public entity under National Department of Public Works with a mandate to:

- Provide strategic leadership to construction industry stakeholders developing effective partnership for growth, reform and improvement of the construction sector;
- Promote sustainable growth of the construction industry and the sustainable participation of the emerging sector in the industry;
- Promote improved performance and best practice of public and private sector clients, contractor and other participants in the construction delivery process;
- Promote procurement and delivery management, the uniform application of policy throughout all spheres of government, uniform and ethical standards including a code of conduct;
- Establish the registration of projects and contractors and other suppliers, to systematically regulate and monitor the performance of the industry and its stakeholders for sustainable growth, delivery and empowerment and for improved performance and capability;
- Promote a regulatory and developmental framework that builds the construction delivery capability for South Africa’s social and economic growth; and delivers to globally competitive standards.

The CIDB Act provided for the establishment of the Register of Contractors and the Register of Projects. It is mandatory on the public sector to apply the Registers in public sector procurement. The private sector is also required to register their projects with the cidb above certain thresholds.

The Registers were implemented in June 2004 and serve as an integral component of the public sector procurement regime. Public sector clients advertise their construction tenders through the cidb website. Contractors registered with the cidb receive tender notifications via sms and email. The public sector may only award contracts to registered contractors.

Applications are processed through the cidb provincial offices and at the cidb head office in Pretoria. The cidb is required to process applications within 21 working days. The rules for registration are prescribed through the CIDB Act (38 of 2000) and the Construction Industry Development Regulations, 2013 as amended. There are nine grading levels across a range of classes of work e.g. General Building (GB) and Civil Engineering (CE). When public sector clients evaluate tenders they use the cidb website to confirm the grading designation levels of contractors.
3. Description of the services

The scope of system enhancements relate to improving the functionality on the Registers systems for increased production outputs and developing related software for other cidb prescripts centred on the Registers Service. The Registers system is built on the Microsoft CRM 2011 version and uses K2 Business Process software and SharePoint 2010.

4. Extent of the services

The requirement is for a service provider to:

- Enhance the existing registration software and related systems;
- Provide maintenance and support to the current registration software systems i.e. Register of Projects (RoP) and Register of Contractors (RoC)
  - Ensure system uptime 24/7
  - Ensure that backups are completed and tested.
  - Provide in-house resources
- Develop and maintain the Best Practice Schemes (comprising the Best Practice Contractor Recognition Scheme and the Best Practice Project Assessment Scheme);
- Maintain the Contractor Development Programme Monitoring and Evaluation (M & E) tool;
- Maintain the cidb API (for integration of client system with the cidb Register of Contractors and the i-Tender Register of Projects);
- Maintain the cidb website;
- Maintain the quarterly monitor automated reporting tool;
- Develop and Maintain an Online Registration service;
- Maintain the Integration with Pastel ;
- Develop and maintain the Compliance Monitor ;
- Develop a new national Register that will be introduced viz. the Register of Professional Service Providers (RoPSP)
- Enhance the Construction Registers Service based on amendments to the cidb Regulations as and when the Regulations are amended
- Develop a customer satisfaction feedback system integrating email, sms and web site feedback into management reports on satisfaction levels

In addition to the above, the service provider will be required to provide maintenance services for the registration applications in the cidb’s current environment. These applications are server based applications, interacting with various internal and external stakeholders through GUI, web based portals and interfaces (API’s, web services) and other “off the shelf” applications such as Pastel.

The service provider must provide resources with the specific skills required to execute the assignments which will be provided as an on-going maintenance and enhancement work packages on various projects or service requests for the duration of the contract. Both parties (cidb and the service provider must work together to deliver the projects successfully).

This assignment will require the specialist technical resources to provide the following skills: project management, business analysis, database management, custom development, systems configuration and integration management for a period of three years on specific technologies including Microsoft CRM, Scanner Vision and K2 Business Process software or any recommended business workflow software.

A guaranteed systems uptime and support turnaround time is required with specific disaster recovery plans. In the event of an unforeseen outage after delivery, and as agreed prior to award of the contract through a negotiation process, penalties will be applied in terms of the maintenance contract.

All custom built applications built for the cidb will remain the property of the cidb and all source code is to be provided to the cidb upon release of any application or new version.
As a statement of policy, cidb will adopt the most relevant business-related hardware and software technology as soon as it is commercially available and when such technology is needed. This is to be done in accordance with public sector procurement regulations.

During all work packages, fraud prevention and detection in the registrations process should be a key consideration in terms of the solutions provided.

5. Brief

The Registers applications are server based, interacting with various internal and external stakeholders through GUI, web based portals and interfaces (API’s, web services) and other “off the shelf” applications such as Pastel.

The efficiency of the CRM-Pastel integration is critical for the overall performance and integrity of the systems. The cidb finance department processes registration fees received from contractors and using the reconciliation of data between CRM and Pastel. Financial transactions are initiated on the CRM system when contractors apply for registration. There are different types of registration fees with the relevant invoices automatically raised in Pastel. There are also refund processes involved. It is required that the service provider is competent in Pastel integration.

The service provider must provide resources with the specific skills required to execute the assignments which will be provided as on-going maintenance and enhancement work packages on various projects or service requests for the duration of the contract.

The service provider must have a Microsoft Gold Level Partner Status.

All custom built applications built for the cidb will remain the property of the cidb and all source code is to be provided to the cidb upon release of any application or new version.

As a statement of policy, cidb will adopt the most relevant business-related hardware and software technology as soon as it is commercially available and when such technology is needed. This is to be done in accordance with public sector procurement regulations.

The cidb's Construction Industry Performance (CIP) Programme imports data from the CRM system into custom developed reporting systems for data analysis and reporting. It is required that the service provider is competent in data migration and data integration across different systems. The service provider must also be competent in report writing.

Skills transfer and capacity building during the project must be given a priority to ensure the skills of the internal resources are increased through the delivery of the solution. During all work packages, fraud prevention and detection in the registrations process should be a key consideration in terms of the solutions provided.

5.1 Current Status of the Construction Registers System

A service provider was appointed to customize Microsoft CRM and integrate it with the business process application, K2, together with a scanning solution, Scanner Vision. The development of the current Registers system commenced in February 2011 and deployed on 30 July 2012. The cidb seeks a service provider to assume the functions for systems development enhancements and systems maintenance.

The cidb has its head office in Pretoria and nine provincial offices. Registrations processing takes place at all of these centres. The entry level applications are processed at the provincial offices while the more complex applications are processed at the head office. The key focus areas for the project are included below.

- Better access to information inside the organization
• Increased communication
• Improved transparency
• Reduced risk of fraud and corruption
• Increased efficiency and productivity
• Reduced dependency on Service Providers
• An increased focus on Security of the systems
• Improved data validation mechanisms
• Improved User Interfaces
• Increased auditability
• Decreased complexity
• The solution must be enterprise wide
• Improved financial integration
• Electronic document management
• Increased skills of the staff within the organisation

5.2 The Environment

The diagram below is a visual representation of the MPLS environment within which the solutions operate. The successful tenderer will be provided with additional information during initial phases of the project.

The following is a list of software currently available at the cidb for use in this project.

<table>
<thead>
<tr>
<th>Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server 2008 or later, including 2008 R2 Server, Windows Server 2012 and HyperV</td>
</tr>
<tr>
<td>Windows 7, 8 and 10</td>
</tr>
<tr>
<td>Microsoft SQL Server</td>
</tr>
<tr>
<td>Microsoft Exchange Server 2010/2013</td>
</tr>
<tr>
<td>Microsoft SharePoint 2010</td>
</tr>
<tr>
<td>Microsoft Project Professional</td>
</tr>
</tbody>
</table>
Microsoft Office Professional
Microsoft Visio Professional
Microsoft CRM 2011
K2 Professional
Nashua Scanner Vision software

5.3 Technologies
The following table describes which technologies are foreseen to provide which functionalities, it is important to note the combination of technologies which will provide the various functions.

<table>
<thead>
<tr>
<th>Technology</th>
<th>LoB Application</th>
<th>Web content management Server</th>
<th>Data Base Server</th>
<th>Active Directory</th>
<th>Office 2010</th>
<th>Exchange</th>
<th>DPM</th>
<th>Windows Server</th>
<th>3rd Party Scanning app</th>
<th>Custom Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Management</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Workflow management</td>
<td>✔</td>
<td>✔</td>
<td></td>
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<tr>
<td>Data Management</td>
<td>✔</td>
<td>✔</td>
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<td></td>
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<tr>
<td>Content management</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Document Management</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Financial management [deposits]</td>
<td>✔</td>
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<td></td>
</tr>
<tr>
<td>User Interface</td>
<td>✔</td>
<td>✔</td>
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<td></td>
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<tr>
<td>Security</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Identity and Access</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Reporting</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Service Interface [e.g. API, etc.]</td>
<td>✔</td>
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<tr>
<td>Communications</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Quality management</td>
<td>✔</td>
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<tr>
<td>Auditing &amp; logs</td>
<td>✔</td>
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<tr>
<td>Backup and restore</td>
<td>✔</td>
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<td></td>
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<tr>
<td>MS office integration</td>
<td>✔</td>
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<tr>
<td>Search</td>
<td>✔</td>
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<tr>
<td>Business Intelligence</td>
<td>✔</td>
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<tr>
<td>Relationship management</td>
<td>✔</td>
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<tr>
<td>Scalability</td>
<td>✔</td>
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<tr>
<td>Multiple access methods</td>
<td>✔</td>
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<tr>
<td>Performance management</td>
<td>✔</td>
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<tr>
<td>Familiar Interface</td>
<td>✔</td>
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</tbody>
</table>

The cidb requires the tenderer to provide and maintain systems which allow the operational implementation of the business rules and processes. It is expected that these applications will
continuously endeavour to reduce fraud and corruption during their lifespan. The detailed requirements matrix is provided as an indication of the requirements.

5.4 Reporting Requirements
- Operational
  - Maintenance, with specific escalation rules and SLA reporting
  - User activities
  - Exception reports
- Management / Analytical
  - Reporting should interrogate the systems and back ends
  - The systems should allow for compilation of reports according to management and business users who may seek to interpret the information based on their requirements
  - Reporting should allow for a scheduler to allow for setup of reports with automatic generation
  - Senior management dashboards
  - Reporting should allow for automated escalation reporting to senior management

5.5 Disaster Recovery (DR)
The following DR activities will be required:
- Disaster recovery plan documented in line with the cidb disaster recovery plan
- Full setup guide on preparing servers and applications
- Location of stored information and data architecture
- List of contact persons for emergencies
- Backups should be compatible to Veeam Backup and Replication V8 and above using LTO4/5
- Backups completed daily, weekly and monthly to disk.

5.6 Maintenance Services
The following are expected to be the minimum service requirements to be documented in the service level agreement
- 24/7/365 availability for external facing systems
- Line of business applications must have high availability
- Business hours include hours from 07h30 to 17h00
- Support services will not include travel expenses unless otherwise agreed upon
- Environment
  - Windows 7 64bit and 32bit, Windows 8, Windows 10
  - Windows Server 2008 R2 Server, Windows server 2012 and HyperV
  - Physical Location: Groenkloof Pretoria [onsite support]
  - Other support areas: Currently one office per province [Remote support]
  - Data centre in Isando (hosting)
  - Business Continuity in Germiston (Continuity)

5.7 Comprehensive Technical Support:
- Timely availability of highly trained experts who provide quality answers
- Access to information-rich resources
- Communication which keeps cidb apprised of product and company news.
- Support of users of the applications
- Telephone support, onsite support and online support where appropriate
- Product updates.
- Notification of Events which may support the knowledge of users and technical staff
- Only days which have been used will be invoiced
- Scheduled events, changes or new releases that can cause a service outage or have an impact on performance will be scheduled after business hours.
- Ensure new versions are communicated in advance.
5.8 Service Levels & Penalties
- System availability (Web modules): greater than 95% availability (24x7) inclusive of business and non-business hours with specific DR plans to recover within agreed timeframes
- Systems availability (Graphic User Interfaces): greater than 95% availability (9x5) availability during business hours
- Respond to and resolve user problems within two hours after the issue is logged, with the resolution of the problem or the response time provided to the user
- Non-availability of the systems must not exceed 2 consecutive business hours twice in any given month or a penalty will be enforced.
  - A penalty of 10 percent or as agreed in the SLA and contract will apply in the event any of the conditions of performance set out are not met [subject to terms and conditions which exclude the external environment]. This will be agreed upon prior to acceptance of contracts.

5.9 Solution Documentation
The following documentation is the minimum requirement; further information may be requested to be documented. These documents should be maintained during the contract.
- User guides and Training guides
- Technical specification requirements
- User specification requirements
- Detailed design plans
- Detailed solution architecture

6. Additional Work Packages
Additional work packages may be requested from time to time and these may be required to be delivered during the contract period. It is noted that these will be negotiated and the successful tenderer will be required to quote on these prior to work commencing:

6.1 Intranet portals:
  - It is expected that development work will be required on the intranet site of the organization, the current functionality is limited and future functionality will include:
    - Enterprise Content Management
    - Forms Driven Business Processes
    - Business Intelligence
    - Search functionality
    - Custom Workflows
    - Provision of a simple, familiar, and consistent user experience across applications, portals or sites

6.2 Additional registration processes:
  - It is expected that technology in place such as the Call Centre and other solutions will be integrated with the various solutions. This appointment will include this integration which will be detailed at a later stage.

7. Resources to be Made Available by the Cidb
The cidb will provide the resources (meeting rooms, cidb business process owners, office space for onsite requirements) that may be required by the service provider in the performance of its function as agreed during the stages.

8. Key Success Factors
The following areas should be considered during submission of the tenderers proposal as the initial success factors.
8.1 Business
- Enhancements delivered within schedule and to the desired quality.
- The appropriate identified business users have the motivation, knowledge, skills and resources to use the solution according to its intended purposes and design.
- The enhancements must be approved by the cidb IT and relevant business unit.
- Business should be able to make changes to business processes without impact to the architecture
- The application must help business achieve their target, in delivering a registration service within the allotted 21 working days.
- Enhancements must be cost effective
- The enhancements must reduce maintenance requirements on the environment for continual business improvements
- Correct project management and governance followed during the life cycle of the enhancement projects
- Application must be able to provide quality data for reporting from a MIS's perspective. (internal and external)
- Application must aid in driving quality control
- Effective training to the user
- All documents approved and signed off by the Business.
- All the necessary stakeholders needs to be included through the lifecycle

8.2 Technology
- The solution already deployed is operational according to the business and technical requirements defined.
- The architecture and infrastructure deployed can be enhanced to support the growing demands of the organization both in terms of functionality and breadth of usage.
- Applications deployed must ensure accountability and responsibility through audit trails
- Functionality and integration currently in place should not be lost or impacted and may be improved
- Security for the application must incorporate prevention mechanisms
- Security shortfalls should be reported to address the threats to the solution

8.3 Operational
- At the end of the project cidb should have the necessary skills and knowledge to manage and maintain the solution on a day to day basis.
- Acceptable response time from system
- The ability to proactively manage the registration system
- Business administration on the application must be available
- Enhanced capabilities which reduce internal user input requirements and empower staff and customers

8.4 Solution
- An improved and well maintained service-based system that allows cidb to open up the provision of different parts of the system to 3rd parties.
- A paperless system that enables all required information for registration to be gathered at the beginning and make that information available for all stages of the process from when the application is received from a contractor until the output which is the activation of the application
- An intelligent system that allows different business units of cidb to produce reports, manage performance and gather information to make informed decisions.
- A flexible system that automates and enhances parts of the business process, enables workflow and rapid modifications should the process change.
- A reliable system that will conduct data validation and provide additional quality assurance.
- A business-oriented system; that allows cidb to easily amend required business rules. This includes information about legislative requirements, finance management and others

9. Particular/Generic specifications
- A bidder who fails to attend compulsory briefing session will be disqualified automatically.
- Bidders must be willing to give cidb representatives access to their business premises for inspection / due diligence review.
- Shortlisted bidders must be prepared to make a presentation to a panel of cidb representatives.
- The quoted price should be all inclusive (Vat, supply and delivery costs to cidb Head Offices or to any venue in and around Gauteng as determined by the cidb representative).
- Reimbursable cost will be quoted for separately and approved by the client as and when required.
- Travelling to meetings and delivery of goods will not be reimbursed.

10. Approvals
Approval of all assignments/projects is by a signature of the contract manager or assigned project manager from the cidb.

Production schedules for each project/assignment will be accepted by form of signature by the contract manager or assigned project manager from the Registrations unit before commencement of any project/assignment.

11. Procurement
There will be a two-stage evaluation process for this RFB. The initial evaluation will be on quality; thereafter, bidders who score a minimum of 70 points will be evaluated on Price and BEE

Below is the procedure for the evaluation of responsive bidders

"Functionality" means the measurement according to predetermined norms of a service or commodity designed to be practical and useful, working or operating, taking into account quality, reliability, viability and durability of a service or commodity.

The need to invite and evaluate bids on the basis of functionality depends on the nature of the required commodity or service. When functionality is utilised as an evaluation criterion, below must be adhered to.

Quality shall be scored by not less than three evaluators in accordance with the criteria and maximum scores as depicted in the table below:

<table>
<thead>
<tr>
<th>Quality criteria</th>
<th>Subcriteria</th>
<th>Maximum number of points</th>
</tr>
</thead>
<tbody>
<tr>
<td>METHODOLOGY</td>
<td>Approach Paper (Please provide a detailed project plan emphasising on the project roll over and lead times.) REFER TO TABLE B</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Submit proposed SLA for the solution(turnaround times)</td>
<td>15</td>
</tr>
<tr>
<td>TENDERER’S EXPERIENCE</td>
<td>Experience in dealing with Corporate and/or Public Sector clients clearly demonstrating CRM and SharePoint development. (Please provide company profile demonstrating the company’s experience)</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>A minimum of 10 years is required in order to get maximum number of points &lt;10 years =0 points</td>
<td></td>
</tr>
<tr>
<td></td>
<td>A sliding scale of 5 points per contactable reference will be used to award points based on positive feedback. (Provide at least three(3) contactable clients)</td>
<td>15</td>
</tr>
<tr>
<td>KEY PERSONNEL EXPERIENCE</td>
<td>Experience of key personnel in information technology projects of a similar nature. (please provide CV’s illustrating the key personnel’s experience)</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>A minimum of five (5) years’ experience in Key Accounts Management. &lt;5 years=0points</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>A minimum of five (5) years’ experience as a Developer. &lt;5 years=0points</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>A minimum of five(5) years’ experience as a Database</td>
<td>5</td>
</tr>
</tbody>
</table>
Presentations to cidb will be done by shortlisted bidders at their premises and the cidb team will evaluate both the site and presentation against the information provided by the bidders in their tender document.

**Maximum possible score for quality (M_s)**

<table>
<thead>
<tr>
<th></th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PRESENTATIONS</strong></td>
<td></td>
</tr>
<tr>
<td>Presentations to cidb</td>
<td></td>
</tr>
</tbody>
</table>

The minimum evaluation criteria for functionality qualifying score is **70 points**.

Only the qualifying bids will be evaluated in terms of the 90/10 preference points systems, where the 90 points is used for price only and 10 points is used for BBBEE status level contribution score card.

Based on the firm bidder price provided, the following formula will be used to award points on price evaluation.

\[
P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}}\right) \quad \text{OR} \quad P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}}\right)
\]

Where

- \(P_s\) = Points scored for price of bid under consideration
- \(P_t\) = Rand value of bid under consideration
- \(P_{min}\) = Rand value of lowest acceptable bid

a) 90 where the financial value inclusive of VAT of all responsive tenders received have a value in excess of R1 million.

12. **Planning and programming**

Service provider will be duly briefed before commencing work on projects and/or assignments, each project/assignment will be discussed and delivery time lines set accordingly.

13. **Format of communications**

Communications will be via consultative meetings, telephonic and e-mail. All necessary conclusions must be confirmed with an e-mail specifying the agreed way-forward.

14. **Key personnel**

A list of team members dedicated to the cidb must be provided, with all contact details and their responsibility and roles in the contract. At least one emergency contact person’s details must be provided. This is the contact person to be reached as and when necessary outside office hours.

15. **Management meetings**

Meetings will be convened at the cidb office and at a different convenient venue when necessary.

16. **Forms for contract administration**

Forms of contract administration are detailed in the Standard Bidding Document 7.1/7.2.

17. **Electronic payments**

A Tax Invoice must be submitted after delivery of goods or rendering of services. The settlement of invoice will be effected after the approval of quality and delivery by the contract or assigned project manager from the communications unit. Invoices are paid 30 days from receipt thereof.

18. **Payment certificates**

Refer to sub-paragraph 16 above.

19. **Use of documents by the employer**
All work produced for the cidb remains the property (IP) of the cidb and shall not be used by the service provider for any other purpose; and shall not be issued to any other persons not in the employ of the cidb.

20. **Property provided for the Service provider’s use**
Supporting material e.g. copy, available images/visuals and Corporate Identity manual will be provided.

21. **Proof of compliance with the law**
The bidder must submit a valid and original Tax Clearance Certificate as issued by the South African Revenue Services.
ANNEXES

Annexure A – Description of the software systems to be enhanced / developed
This annexure provides a description of the software systems to be developed, in addition to the software development for the registration systems described in this Terms of Reference. The description below is an indicative scope of the work to be performed.

A1) Construction Registers Service
The Construction Registers Service is described earlier in this document. Enhancements to the Construction Registers Service system are required. The system includes the iTender-Register of Project and the Register of Contractors. Enhancements relate to user requirements arising out of business process improvements and improved reporting. Enhancements also arise out of amendments to the registration criteria.

A2) BEST PRACTICE SCHEMES
The CIDB Act (Act 38 of 2000) requires that the Board must, within a reasonable period after the establishment of the register of contractors, establish a Best Practice Contractor Recognition Scheme which:

- Enables organs of state to manage risk on complex contracting strategies; and
- Promotes contractor development in relation to best practice standards and guidelines developed by the Board.

The Act also requires that the Board must establish a Best Practice Project Assessment Scheme based on the best practices identified by the Board. All construction contracts above a prescribed tender value will then be subject to an assessment of compliance with best practice standards and guidelines published by the Board.

The Best Practice Schemes are being developed in partnership with the construction industry and include, but are not limited to:
- The Standard for Assessment and Recognition of Competencies of Contractors
- Requirements for Contractor Performance Reports
- Standard for cidb Construction Management Systems
- Standard for Indirect Targeting for Enterprise Development
- Requirements for Green Building Certification
- Standard for Constructions Skills Development

Software customisation will be required for the best practice assessment schemes and as agreed to, between the cidb and service provider, in work packages with specific time frames during the contract.
### TABLE B: Scoring for the Approach Paper

<table>
<thead>
<tr>
<th>Scoring (evaluator to score between 0 – 40)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor Score between 0 – 10</td>
<td>The technical approach, methodology and/or workplan is poor / is unlikely to satisfy project objectives or requirements. The tenderer has misunderstood certain aspects of the scope of work and does not deal with the critical aspects of the project. The activity schedule omits important tasks or the timing of the activities and correlation among them are inconsistent with the approach paper. There is lack of clarity and logic in the sequencing</td>
</tr>
<tr>
<td>Satisfactory Score between 11 – 20</td>
<td>The approach is generic and not tailored to address the specific project objectives and requirements. The approach does not adequately deal with the critical characteristics of the project. All key activities are included in the activity schedule, but are not detailed. There are minor inconsistencies between timing, project deliverables and the proposed approach.</td>
</tr>
<tr>
<td>Good Score between 21 - 30</td>
<td>The approach is specifically tailored to address the specific project objectives and requirements and is sufficiently flexible to accommodate changes that may occur during execution. The work plan fits the approach paper well; all important activities are indicated in the activity schedule and their timing and sequencing is appropriate and consistent with project objectives and requirements. There is a fair degree of detail that facilitates understanding of the proposed work plan</td>
</tr>
<tr>
<td>Very good Score between 31 - 40</td>
<td>Besides meeting the “good“ rating, the important issues are approached in an innovative and efficient way, indicating that the tenderer has outstanding knowledge of state-of-the-art approaches. The approach paper details ways to improve the project outcomes and the quality of the outputs. The sequencing and timing of activities are very well defined, indicating that the tenderer has optimized the use of resources and the work plan permits flexibility to accommodate contingencies.</td>
</tr>
</tbody>
</table>
22. Pricing Instruction and Pricing schedule

Pricing Instructions

1. The Tenderer must price ALL items contained in the Pricing Schedule.
2. Rates are to include all costs with **no unspecified cost to arise**.
3. Yearly increases in the maintenance cost must be clearly indicated.
4. Payment will be made on a time charge and reimbursable cost price basis for the services rendered, and may be invoiced monthly (if applicable).
5. Interim payments will be made monthly against proven progress in terms of the agreed monthly work plan and signed off-time sheets (if applicable).
6. Payment will only be made on the basis of valid tax invoices provided.
7. Travel expenses may only be claimed in respect of the cost of transportation outside Gauteng.
8. Below is the pricing schedule to be completed as the breakdown of the bidder’s offer.

2.3 Pricing Schedule

The price tendered shall be based on the services provided by the Service Provider as stipulated in the Terms of Reference. The items and related quantities listed below are an estimate projected for 36 months from date of awarding of the contract.

The assignment is for a period of three years and involves systems development. The Registers software systems are based on the Microsoft CRM platform and the K2 process management tool. An indicative level of development and maintenance functions are included below:

<table>
<thead>
<tr>
<th>DESCRIPTION OF SERVICE</th>
<th>NO OF HOURS PER MONTH</th>
<th>HOURLY RATE INCL. VAT</th>
<th>YEAR 1 PRICE INCL. VAT</th>
<th>YEAR 2 PRICE INCL. VAT</th>
<th>YEAR 3 PRICE INCL. VAT</th>
<th>YEAR 1 + 2 + 3 TOTAL PRICE INCLUDINC VAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>28 Hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Systems Development</td>
<td>100 Hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance</td>
<td>72 Hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total No of hours per month</strong></td>
<td>200 Hours</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

***Unused hours on any particular month will be carried forward and used later.

***Hours are inclusive of disbursement costs in travelling to and from cidb Offices in Groenkloof, Pretoria. Any further disbursement costs must be agreed to between cidb and the service provider before costs are incurred. Disbursements may not exceed 5% of the total contract value.