cooperative governance
Department:
Cooperative Governance
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

Tender Ref #:	**COGTA (T) 02/2026**	**Tender Description:**	**PROVISION OF ARCHIVING AND OFFSITE STORAGE FACILITY FOR THE RECORDS OF THE DEPARTMENT OF COOPERATIVE GOVERNANCE FOR A PERIOD OF 36 MONTHS.**

PART A – BID DETAILS

1. The Department of Cooperative Governance (hereunder referred to as the Department or DCOG) invites prospective bidders for the provision of an archive and secured offsite storage facility for the records of the Department of Cooperative Governance (DCOG) for a period of 36 months.

2. The Department of Cooperative Governance (DCoG) is mandated to develop and monitor the implementation of national policy and legislation aimed at transforming and strengthening key institutions and mechanisms of governance in national, provincial and local government to fulfil their developmental role; develop, promote and monitor mechanisms, systems and structures to enable integrated service delivery and implementation within government; and promote sustainable development by providing support to and exercising oversight of provincial and local government.

PART B –ADMINISTRATIVE REQUIREMENTS

1. BID DOCUMENTS

Only bids that comply with all administrative requirements will be evaluated further onto the Mandatory Requirement stage. Failure to submit the documents listed below will render your bid as disqualified.

SCM ADMINISTRATIVE COMPLIANCE		
#	**Criteria**	**Yes / No**
1.1	Supplier is registered on the National Treasury Central Suppliers Database (CSD) on or before the bid closing date.	
1.2	SBD 1 Fully ,completed,signed and submitted.	
1.3	SBD 3.2 Fully completed, signed and submitted.	
1.4	SBD 4 Fully completed, signed and submitted.	

2. VERIFICATION OF INFORMATION PROVIDED

No bids will be considered from:

1. Individuals in the service of the State.
2. Organisations with directors (whether remunerated or not) in the service of the State.

This clause does not apply to bidders that are government departments/entities.

NB*: The Department may request the bidder to provide information to engage banks, credit rating agencies and the relevant institutions to obtain information on credit records, criminal records, and pending court cases.*

3. MANDATORY REQUIREMENTS

Failure to submit the documents listed below will render your bid null and void and will not be considered or will be disqualified.

Mandatory Requirement		
#	**Criteria**	**Yes / No**
3.1	Summary of Bidder Experience (Annexure A) attached.	
3.2	Proposed project team (Annexure B) attached.	
3.3	Detailed proposal and project execution plan submitted	
3.4	Pricing information (Cost Breakdown – Annexure C) attached.	
3.5	National Archives and Records Service of South Africa (NARSSA) letter of compliance (for offsite storage facility)	

N/B: Only bids that comply with the mandatory requirements will be evaluated further.

PART C – DETAILED REQUIREMENTS

1. Objective and Purpose of the Assignment

The DCOG seeks the services of a Service Provider for provision of archiving and off-site storage of documents.

The project will ensure that information under the control of DCOG is managed effectively and efficiently throughout its life cycle. It will also ensure that records are kept:

- in such a way that they can readily be retrieved when required.
- for a period agreed with DCOG; and
- in a secured, climate-controlled environment, that is NARSSA compliant.

2. Introduction and background

The National Archives and Records Services Act 43, of 1996, as amended requires that governmental bodies should apply best records management practices as prescribed by the Act and preserve records of enduring value by decongesting registries and storage areas through movement of records from active to semi-active and non-active storage areas as well as implement a systematic disposal programme to allow the flow of information and better management of the records. The Department of Cooperative Governance (DCOG) as a public body is subject to the provisions of the above legislation.

3. Problem Statement

DCOG has a large number of records of which a bulk should legally be retained. The department has a responsibility of ensuring that its records are stored and managed in a manner that will preserve them for as long as they are needed. It also must ensure that during their lifecycle they are safe, accounted for, retrievable and not damaged.

Currently, DCOG have limited storage facility which does not comply with climate control as prescribed by the National Archives and Records Service of South Africa (NARSSA). The assessment that was conducted with the NARSSA also confirms DCOG does not meet the minimum storage requirements. The department has also considered digitising the records instead of acquiring an archive facility. However, the law requires the department to archive the original physical records that have archival value and must be retained for a longer period.

Additionally, following a comprehensive cost analysis conducted, it has been established that digitisation of records presents a significantly higher financial burden compared to traditional archiving methods. Consequently, archiving has been identified as the more cost-effective approach for managing the department's records. It is based on these challenges and legislative requirements that DCOG has considered an off-site storage as a solution to archive records of archival value and those that may be needed as part of business requirements.

4. Detailed Scope of the assignment

The prospective Service Provider shall upon being appointed and signing of a contract; be expected to provide a comprehensive and reliable off-site storage facilities, records management and retrieval programme.

- ✓ To provide off-site storage for 10 000 D1 boxes (427mm x 330mm x 250mm) which includes pricing for full 36-month period (handling, packaging, indexing, transport, and storage fees). The price should include both the initial take on costs as well as the monthly costs. An estimated additional 2000 D1 archive boxes and lids will be transferred to offsite storage warehouse in the period of three years of the contract.
- ✓ Project/ Execution Plan and Management should address the following elements: A clear project scope, schedules, costing, deliverables, planned work timeframes, logistics, milestones in stages, resources and output.

Project Management:

- ✓ Appoint a dedicated project manager to oversee the entire relocation project.
- ✓ Maintain open communication channels with the client for updates, questions, and concerns.

- ✓ Account for each record that has been received from current storage facility of DCOG;
- ✓ Tracking of boxes: Physical documents should have bar-coded with electronic data description fields, for tracking, control, retrieval, and access.
- ✓ Supply of Stationary: Supply DCOG with standard D1 boxes.
- ✓ Collection of boxes: The boxes will be transported from where DCOG is located to the off-site storage facility.
- ✓ A list of dedicated personnel from Registry will be submitted to the service provider for request of the records and it will be updated when the need arise, for security of the records and control purpose.
- ✓ To provide skill transfer in relation to the understanding of how departmental records are indexed. That should include how they can be searched.
- ✓ Detailed indexing: A complete detailed list of documents indexed that in line with department standard or NARSSA standard template and stored in the off –site storage facility, to be updated upon collection and emailed to DCOG.
- ✓ Control system should be in place for Request and Returning of boxes to off-site storage.

PHASE ONE

4.1 **Initial Records Intake Exercise**

- ✓ Develop the Initial Records Intake Plan with clear responsibilities and timelines. The Initial Records Intake Exercise must cover the following:
  - Time Frames (including capturing of files onto the Service Provider's system);
  - The Plan must make provision for records to be captured into the system of service provider as and when they are being received.
  - Enable access to the records, as and when required by DCOG, during the intake exercise.
- ✓ The initial transfer of records must be completed within 6 months after the SLA signed, and it will entail;
- ✓ Collection, uploading of files/boxes and transporting them from the current Records Management storages of the Department to the service provider's premises/offsite storage.
- ✓ Replace any damaged boxes.

Receive an inventory of the boxes completed from the client on a monthly basis.

- Pack, label, and transport the newly received boxes to the new offsite storage facility.
- Unpack and integrate the new boxes into the existing storage system.
- Maintain a detailed inventory of all boxes, including those received monthly.

ONGOING PHASE

4.2 Records Transportation, Storage, Maintenance, Retrieval Services, and Support services

1. Records Transportation Services

- ✓ Collect files from DCOG Offices as outlined in the bid specification
- ✓ Collection must be done during the week.

NB: The time interval may change during the contract.

- ✓ The Service Provider shall deliver records to DCOG Main Registry as and when necessary.
- ✓ Main Registry of the department must be able to acknowledge receipt of files at file level.
- ✓ Secure and safe transport as per NARSSA Requirements must be used always.
- ✓ Deliver files as and when required by DCOG.

- ✓ The files collected from offsite storage will be delivered to Main Registry area of the department for processing, after which they will be collected by the service provider for storage in the warehouse.

2. Storage

- ✓ Provide secure off-site storage for files that meet the standards prescribed in the:

- ✓ Checklist for Offsite Storage Facilities, **Annexure 20**: Protecting Records against various Perils, Part 5 of the NARSSA Records Management Policy Manual (Version of October 2007) and all other applicable requirements from the National Archives and Records Services of South Africa (NARSSA).

- ✓ The service provider must be able to produce letter of compliance of the offsite storage facility as per NARSSA requirements.

The detailed standards outlined in the above-mentioned documents cover the following categories:

- Security Measures;
- Disaster Prevention and Management;
- Facility Design and Location;
- Records Transportation Vehicles;
- Internal Policies and Procedures;
- Storage Capabilities;
- Physical Care Services;
- Customer Care Services.

- **Security and Confidentiality:**

✓ Ensure the highest level of security and confidentiality for all files and documents during transportation and storage. Secure transport using GPS-tracked vehicles, vetted drivers, and continuous custody of records.

✓ Implement access controls, surveillance, and alarm systems at the new facility to safeguard the contents of the boxes.

3. Records Management Services

- **Initial Services:**

New box provision when required;

- Packaging;
- Data Entry;
- Indexing;

Boxes must be captured into the system of the appointed service provider within the first six months of signing the service level agreement.

✓ Filing and Refiling in the Warehouse – once a file has been retrieved, re-boxed and handed over to the service provider, it must be re-traceable within 72 hours.

- File Locating and Retrieval Services:

Locating:

✓ Have track and trace capabilities and be able to file and draw files when required.

Retrieval:

1. Retrieval for Special Projects – must be done at a box level for scanning, destruction, quality assurance and other similar projects.
2. Retrieval for day-to-day operations must be done at file level;
3. Retrieval must be done within the following time frames:
4. 2 working days (48 hours) after receiving file request from DcoG.
5. Bulk retrievals will also be required according to the project time lines which will be agreed upon.

Management of files

- System must use bar codes.
- Boxes must be full at all times
- System must record details of loose documents contained in the boxes – Details must be recorded per box.

✓ Media Products:

Service Provider will provide **boxes and file stickers** as and when necessary.

- D1 boxes (427mm x 330mm x 250mm) with Lids;
- Loose correspondence boxes – the box wallets must fit into the normal size box;

- **NB:** Samples of the boxes must be part of the presentation during the site visit inspection.

4. Support Services

- ✓ Inventory list of department records stored at an offsite storage
- ✓ Dedicated official provided by the service provider to handle all enquiries from the department.
- ✓ Contract Exceptions (incidents of non-compliance to SLA) – service provider to note and report on any discrepancies during the collection of records, including incidents of actual records collected not matching with what they were requested to collect.

5. Post Contract termination services

- ✓ Service provider must package and transport all records stored from their storage to the new specified location after the contract has reached its term end.
- ✓ An updated inventory list of all the records must also be submitted to the Department.

5. Deliverables and time frames

The following deliverables will be expected during the period of the contract:

5.1 The successful bidder is required to provide off-site storage for 10000 D1 boxes (427mm x 330mm x 250mm) which includes pricing for full 36 months period (handling, packaging, indexing, transport, and storage fees as per annexure A). The price should include both the initial take on costs as well as the monthly costs.

5.2 An estimated additional 2000 D1 archive boxes and lids will be transferred to offsite storage warehouse in the period of three years of the contract.

Conditions

- ✓ Ensure that all 10000 initial D1 boxes are safely and securely relocated to the new facility.
- ✓ Safely transport and integrate an additional 2000 boxes over 36 months.
- ✓ Security and Confidentiality:
    - Ensure the highest level of security and confidentiality for all files and documents during transportation and storage.
- ✓ Implement access controls, surveillance, and alarm systems at the new facility to safeguard the contents of the boxes.
- ✓ Records management services required, amongst other things includes, on-site document management and storage, retrieval, image processing, data protection, backup and paper management, document management, labelling and indexing of boxes as well as document disposal.
- ✓ Services Retrieval: DcoG shall be entitled at its sole discretion, to require retrieval of records to take place either by way of:
    - Hand delivery of required files
    - Transmission of files by electronic.
    - Turn-around time for delivery must be 48 hours depending on the urgency

- ✓ Storage: Collected documents for storage need to be stored in line with NARSSA requirement at offsite storage facility and placed within filing racks on shelves in such a manner that it will be easily retrieved when required. File/documents always need to be well preserved and carefully handled and maintained to ensure no damage or destruction of such information. All files and boxes that have noticeable damage because of regular handling need to be replaced to prevent any further damage.
- ✓ A proposed approach to managing records; clear outline of how records will be transferred from one storage to the other and maintenance thereof.
- ✓ Regular Reports:
    - Provide regular monthly/quarterly progress reports to the client throughout the 36-month project duration.
    - Quarterly and Annual reporting of statistics related to the status and movements of records to and from off-site storage facility as and when required.

6. Skills, Knowledge and Experience Requirements:

The Service Provider must demonstrate that they have competent and adequately resourced project team with the required qualifications, experience, and expertise to deliver secure, compliant, and efficient records management and off-site storage services.
The project team should have at least:

- Project Manager
- Records Management Specialist
- Storage Facility Supervisor

7. Roles and Responsibilities for DcoG and other stakeholder if any:

- ✓ DCoG is the custodian and owner of all records and is responsible for strategic direction and oversight of the off-site storage project.
- ✓ The Service Provider is responsible for the operational execution of secure storage and records management services.
- ✓ DCoG Supply Chain Management is responsible for facilitating the procurement process ensuring compliance with PFMA and Treasury Regulations.

8. Communication and Reporting

- Clear communication lines shall be maintained between all parties through designated Liaison Officers upon signing of SLA, who shall serve as the primary point of contact. All communication shall follow formal reporting structures, supported by documented records.
- The Service Provider shall submit structured reports (monthly, quarterly, and annually) and comply with SLA reporting requirements. Regular meetings shall be held to monitor performance, ensure compliance, and address operational matters

Communication shall be conducted through:

- ✓ Official email correspondence (primary)
- ✓ Scheduled meetings (physical or virtual)
- ✓ Formal written reports
- ✓ Phone or verbal communication allowed for urgent matters
- ✓ Must be followed by written confirmation (email)

9. Monitoring and Evaluation

To ensure the successful execution of the project, a robust monitoring and evaluation framework will be implemented:

- ✓ Reporting Protocols: The successful bidder will be required to submit structured reports (monthly/ quarterly/annually) detailing activities, achievements, and any deviations from the project plan.
- ✓ Site Inspections and Audits: The department will conduct annual inspections of the offsite storage facility and audit the handling of records to verify compliance with legal and procedural requirements.

10. Bid Documents Submission Format

Package 1: The following should be submitted – :

- SBDs 1, 4, and 6.1.
- National Treasury Central Suppliers Database (CSD) report, not older than 30 days (www.csd.gov.za).
- **Proposal Format** – Bidders must include a detailed work-plan/methodology, and the implementation plan as per proposal in their bid.

NB: No pricing information must be included in package 1

Package 2: Pricing information.

- Separate envelope. Price proposals must include 15% VAT and must be fully inclusive to deliver all goods, services and outputs indicated in the terms of reference.
- *SBD 3.2 (Pricing Schedule)*
- Proposed cost breakdown on the last page of the ToR (Annexure C)

PART D – FUNCTIONAL EVALUATION – TO BE EVALUATED BY THE BEC

Each Bid Evaluation Committee (BEC) member will evaluate acceptable bids based on the proposals and bid documents submitted. The scoring system to be utilized will be from **0 – 4** as per the functional evaluation below

The **Score obtained for each criterion** will be calculated by multiplying the score awarded by a BEC member by the weight for that criterion. The **overall score for a BEC member** will be expressed as a percentage (Total weighted score divided by the maximum possible score, then multiplied by 100). The **overall score obtained by a bidder** will be the average of overall scores awarded by BEC Members (rounded to the nearest whole number). Only Bidders that received **the indicated minimum overall scores** will proceed to Part E – Price Evaluation and Award.

Where functional evaluation is conducted in stages, bidders must meet the minimum overall score for a particular stage to proceed to the next stage and only bidders that met the minimum overall scores for all stages will proceed to Part E – Price Evaluation

The Bid Evaluation Committee may:

- Evaluate and score bids based on the bid documents and proposals submitted; or

The final evaluation and scoring of bids will be based on the proposals submitted, as well as on information provided by bidders during bid presentations (if applicable). Presentations can be used to summarise and clarify bids and may not substantially depart from the proposals submitted.

1. FUNCTIONAL EVALUATION STAGE 1

EVALUATION OF THE PROPOSAL AND PROJECT EXECUTION PLAN

(Bidders must obtain a minimum of qualifying score of 60% on functional evaluation stage 1 to be able to proceed to functional evaluation stage 2)

1.1	**COMPANY'S EXPERIENCE** • Service Providers should have experience in providing offsite storage and document management services. • Letters from contactable references indicating that similar project was executed should be attached.	**Weight**	**5**
Evaluation			**Score**
Bidder has less than 2 years in providing offsite storage and document management services			0
Bidder has 2 – 3 years in providing offsite storage and document management services			1
Bidder has 4 – 6 years in providing offsite storage and document management services			2
Bidder has 7 - 10 years in providing offsite storage and document management services			3
Bidder has more than 10 years in providing offsite storage and document management services			4

1.2	**PROJECT MANAGER** Service provider should have a dedicated Project manager who has a qualification in Project Management at NQF level 6 or higher, with at least two (2) years' experience in managing a project of similar nature, with the required skills in: - Project Planning and Execution - Communication and Governance - Risk management and problem-solving - Security and Risk Management - Compliance and Standards	**Weight**	**5**
Description			**Score**
Project manager has none of the skills listed above			0
Project manager has one (1) or two (2) of the skills listed above			1
Project manager has three (3) skills listed above			2
Project manager has four (4) of the skills listed above			3
Project manager has five (5) of the skills listed above			4

1.3	**RECORDS MANAGEMENT SPECIALIST** Service provider should have a dedicated records management specialist with a qualification in Records Management or Information Science at NQF level 7 or higher with at least two (2) experience in: - Indexing of records - Retrieval and tracking records - Knowledge of managing records throughout its life cycle - Inventory creation - Knowledge of retention schedules	**Weight**	**5**
Description			**Score**
Records Management Specialist has none of the skills listed above			0
Records Management Specialist has one (1) or two (2) of the skills listed above			1

Records Management Specialist has three (3) of the skills listed above	2
Records Management Specialist has four (4) of the skills listed above	3
Records Management Specialist has five (5) or more of the skills listed above	4

1.4	**PROJECT EXECUTION PLAN** • Project execution plan should outline how the service provider will address the following elements: a) A clear project scope, b) schedules, c) costing, d) deliverables, e) planned work timeframes, f) logistics, g) milestones in stages, h) resources i) output.	**Weight**	**5**
Evaluation			**Score**
Project execution plan meets none of the elements listed above			0
Project execution plan meets 1-3 elements listed above			1
Project execution plan meets 4-6 elements listed above			2
Project execution plan meets 7- 8 elements listed above			3
Project execution plan meets all 9 elements listed above			4

1.5	**RECORDS LOCATION** • The bidder's storage facilities should be located within hundred (100) kilometres (km) radius from the DCOG Head Office at 87 Hamilton Street, Arcadia, Pretoria. • Bidders must provide a proof of storage location: letter from the municipality (not older than three (3) months before the closing of the bid or lease agreement or title deed must be attached.	**Weight**	**4**
Evaluation			**Score**
• Storage facility located more (100) km radius from 87 Hamilton Street, Arcadia, Pretoria.			0
• Storage facility located between 80-100 km radius from 87 Hamilton Street, Arcadia, Pretoria			1
• Storage facility located between (79 to 60) km radius from 87 Hamilton Street, Arcadia, Pretoria			2
• Storage facility located between (59 to 40) km radius from 87 Hamilton Street, Arcadia, Pretoria			3
• Storage facility located between (0 to 20) km radius from 87 Hamilton Street, Arcadia, Pretoria			4

2. FUNCTIONAL EVALUATION STAGE 2

Functional Evaluation Stage 2 assesses the bidder's operational capability to provide secure, compliant, and sustainable storage services for records management.

Only bidders that meet all the requirements of this checklist will be considered for further evaluation. Bidders must achieve 100% compliance with this checklist.

A site inspection will be conducted in accordance with the table provided below. Bidders will be informed regarding the date and time of the site visit inspection.

No.	Evaluation Criteria	Yes/No	Comments
1.	24-hour monitored security at facility		
2.	Access control and authorised entry procedures		
3.	Secure loading and unloading area		
4.	Facility has adequate fire detection system		
5.	Automatic fire suppression system installed		
6.	Portable fire extinguishers installed and maintained		
7.	Disaster preparedness and recovery plan		
8.	Evidence of sound building construction suitable for records storage		
9.	Environmental controls to minimise damage to records (lighting/ventilation)		
10.	Shelving elevated at least 150 mm from floor		
11.	Facility climatically controlled		
12.	No internal water-pipe risk to records, or mitigation controls in place		
13.	Secure records transport vehicles available		
14.	Vehicles fitted with tracking (GPS)		
15.	Documented chain of custody (signed receipt and dispatch records)		
16.	Confidentiality agreements signed by staff		
17.	Adequate storage capacity for current DCoG records		
18.	Capacity for future growth of DCoG records		
19.	Temperature and humidity control for paper records		
20.	Racking and shelving specifically designed for records storage		
21.	Use of suitable archival-quality storage boxes or containers		
22.	Facility is clean and free from dust, pests and contaminants		

NB: All the elements specified above are mandatory. Bidders who do not meet all the elements will be disqualified and will not be evaluated further.

PART E – PRICE EVALUATION AND AWARD– TO BE EVALUATED BY THE BEC

a. Only bids that meet all administrative requirements and the minimum functional requirements will be evaluated in terms of the provisions of the Preferential Procurement Policy Framework Act and related regulations – see attached bid documents. The evaluation method (80/20) and preference points allocation applicable to this bid are indicated in the attached SBD 6.1.

- Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

The Specific goals allocated points in terms of this tender	Number of points allocated (80/20 System)	Number of points claimed (80/20 system) To be completed by the tenderer.
Women Ownership (51% or more) **a) 0%** **b) 1%-10%** **c) 11%-25%** **d) 26% - 50%** **e) 51%-100%**	**5** a) = 0 b) = 1 c) = 2 d) = 3 e) = 5	
Youth Ownership (51% or more) **a) 0%** **b) 1%-10%** **c) 11%-25%** **d) 26% - 50%** **e) 51%-100%**	**7** a) = 0 b) = 1 c) = 3 d) = 5 e) = 7	
Disability Ownership (51% or more) **a) 0%** **b) 1%-10%** **c) 11%-25%** **d) 26% - 50%** **e) 51%-100%**	**8** a) = 0 b) = 2 c) = 4 d) = 6 e) = 8	

b. The below documents must be submitted as POE in order to claim points for specific goals:
   - Disability Ownership – Doctor`s Certificate or SAPS Sworn Affidavit
   - Ownership (Certificate issued by CIPC)

PART F – SPECIAL CONDITIONS AND CONTRACT MANAGEMENT

1. SPECIAL CONDITIONS APPLICABLE TO THIS BID

1.1. The Department may, at its sole discretion, cancel this bid.

1.2. The period of thirty days (30 days) referred to in the General Conditions of Contract paragraph 27.2 applies. If the service provider is found to have engaged in fraudulent activities or caused the Department to incur irregular expenditure, the Department reserves the right to cancel the bid and any subsequent SLA with immediate effect. Repercussions for the conduct of the Service Provider referred to above may include blacklisting of the Service Provider thus preventing them from doing business with government for 10 years.

1.3. The Department may, at its discretion, require that each employee of appointed service providers, each contractor or other participants, sign a code of conduct to promote ethical behaviour. The Department may, at its sole discretion, prohibit any person found to be in breach of such code of conduct from further participation or involvement in the project.

1.4. Additional conditions for an applicant who would like to apply as a Consortium / Joint Venture. It is recognised that applicants may wish to form consortia or joint ventures to respond to this bid. The following guidelines apply:

- Bidders are prohibited from being part of more than one consortium / joint venture and to submit an individual bid and a bid as part of a consortium / joint venture.
- One of the members shall be nominated by the others as authorised to be the lead applicant and this authorisation shall be included in the agreement entered between the consortium members.
- The lead applicant in the Consortium or Joint Venture must satisfy all the administrative requirements contained in the ToR and submit all the relevant documents necessary to meet the minimum requirements of the applications.
- Other members of a consortium or a joint venture must comply with the requirements in line with Service Provider Funding Policy prescripts for the respective Service Provider categories.
- The consortium/joint venture submission must be signed-off by each institution/organisation to be legally binding on all consortium members.
- The lead applicant shall be the only authorised party to make legal statements, communicate with the department, and receive instructions for and on behalf of all the members of the consortium.
- The lead applicant shall be held responsible for the delivery of services and meeting conditions outlined in this bid.
- A copy of the agreement entered into and signed by all members of the consortium or joint venture shall be submitted with the consortium proposal indicating the respective responsibilities of each party.
- Indicate how the joint venture/ consortium will be managed in case of a dispute arising during the programme's implementation period (Provide a contingency plan of managing any possible conflicts).

2. CONTRACT MANAGEMENT

2.1. The successful bidder will be expected to enter into a service level agreement (SLA) with the Department of Cooperative Governance. The National Treasury General Conditions of Contract (GCC) will form part of the SLA to be concluded between DCOG and the successful bidder.

2.2. The SLA will include project assignments that will address each of the project deliverables. The SLA may further establish a Project Steering Committee to manage, monitor and oversee the project such as:

- Ensure that services are rendered timeously;
- render a quality assurance function; and
- ensure that the project remains within the allocated budget.

2.3. The SLA will include a detailed payment schedule. Payments will therefore only be approved and processed based on the achievement of deliverables as per the implementation plan and/or project plan and related performed project tasks.

2.4. If the parties (the Department and the appointed service provider) are unable to reach agreement on the special conditions of contract (SLA) after 14 calendar days of the date on which the bid award is communicated to the service provider, then the Department reserves the right to cancel the award to the service provider and to appoint another service provider.

2.5. Bidders should note that:

- All information related to this bid, or information provided to the service provider after the award of this bid, must be treated as confidential and may not be disclosed in any way to third parties without the explicit written consent of DCOG.
- All rights, title and ownership of any Intellectual Property developed by or for the Service Provider or DCOG independently and outside of execution/production of the Deliverables related to this bid and provided during this project ("Background IP") shall remain the sole property of the party providing the Background IP.
- To the extent that the Service Provider utilises any of its Background IP in connection with the Deliverables, such Background IP shall remain the property of the Service Provider and DCOG shall acquire no right or interest therein. Service Provider shall grant DCOG a non-exclusive, royalty-free, non-transferable licence to use such Background IP strictly for purposes of making beneficial use of the Deliverables into which such Background IP has been incorporated.
- All Intellectual Property rights in Bespoke Deliverables are or will be vested in and owned by DCOG unless specifically agreed otherwise in writing. The Service Provider agrees that it shall not, under any circumstances, question or dispute the rights and ownership of DCOG in and to the Bespoke Deliverables. DCOG shall grant the Service Provider a non-exclusive, royalty free, non-transferable licence to use the Bespoke Deliverables to perform its obligations under this project.
- The Service Provider may not publish or sell, in whole or in part, any Bespoke Deliverables emanating from this project without the explicit written consent of DCOG.
- The Copyright of any Bespoke Deliverables shall vest in DCOG.

2.6. No amendments to the SLA or any variation, waiver, relaxation or suspension of any of the provisions thereof shall have any force or effect, unless reduced to writing and signed by both parties.

ANNEXURE A: BIDDER EXPERIENCE SUMMARY

Contracting party (Company/entity name)	Project title and description	Start date	End date	Budget

Bidders must ensure that their proposals contain details of how the projects listed above are relevant to the objectives.
Bidders must attach reference letters and/or contactable references for projects listed above.
Bidders must not deviate from this table as prescribed above.

ANNEXURE B: PROJECT TEAM SUMMARY

Role	Surname, Name	RSA ID Number	Highest Qualification	Current Employer	Total Year of Experience	Total Year of Experience in similar projects
Executive Manager/ Team Leader/ Project manager						
Team member 1 (records management specialist)						
Team member 2 (IT specialist)						
Team member 3						
Team member 4						

Attach detailed CV as well as confirmation of availability for each person listed above.
Attach copies of qualifications for each person listed above,
Information obtained from the CSD report will be used to verify the criminal records and credit status of directors/owners of the supplier, where applicable.
Bidder must not deviate from this table as prescribed above.

ANNEXURE C: COST BREAKDOWN INFORMATION

INDEXING AND STORAGE QUOTATION

Detailed Index and packing:

Service provider should provide a detailed index monthly for all documents taken for off-site. The following table it's an example for specification of indexing and packaging which should be highlighted on the quotation according to quantity.

1. **Initial Costs**

Item	Quantity	Cost (Excl. Vat)	Vat (Where Applicable)	Cost (Inc. Vat)
Supply D1 Storage Boxes & Lids	10000			
Supply of File Labels	4000			
Supply of Box Labels	10000			
Supply of Index Pads	10000			
Pack and Index - Per Box	10000			
Box Collection	10000			
Data Capture – Per Line	10000			
Scanning of barcodes of the boxes	10000			
New Box Location Labelling Fee	10000			

Barcode Labels	10000			
Box Location Handling Fee	1			
Delivery Fee	1			
Detailed Index	1			
Total Initial Cost (Including VAT)				

2. Monthly Costs

Item	**Quantity**	**Cost (Excl. Vat)**	**Vat (Where Applicable)**	**Cost (Inclusive. Vat)**
Storage of current boxes	10 000			
Storage of additional Boxes	2 000			
Total Initial Cost (Including VAT)				

3. Variable Costs

Item	Quantity	Cost (Excl. Vat)	Vat (Where Applicable)	Cost (Incl. Vat)
Supply D1 Storage Box & Lid	1			
Supply of File Label	1			
Supply of Box Label	1			
Supply of Index Pad	1			
Pack and Index - Per Box	1			
Box Collection	1			
Data Capture – Per Line	1			
Scanning of barcodes of the box	1			
New Box Location Labelling Fee	1			
Barcode Label	1			
Box Location Handling Fee	1			
Delivery Fee	1			
Detailed Index	1			
Total Initial Cost (Including VAT)				

TOTAL OVERALL COST: (Pricing 1 - 3)

Item no.	Item	Total Cost (Including VAT)
1.	Initial Costs	
2.	Monthly Costs (12 000 boxes) (10 000 + 2000)	
3.	Variable Costs	
Total Cost (Including VAT)		

Note:
Bidders must not deviate from this table as prescribed above.
Failure to cost any of the above services will result in the disqualification of the bidder.