

REQUEST FOR QUOTATION (RFQ) FOR A RISK MANAGEMENT WORKSHOP, RISK MATURITY ASSESSMENT AND COMBINED ASSURANCE REVIEW SERVICES

Reference Number	IZIKO_RFQ_FIN_RISK 12/06/2026
Description	FOR A RISK MANAGEMENT WORKSHOP, RISK MATURITY ASSESSMENT AND COMBINED ASSURANCE REVIEW SERVICES
Address	Iziko South African Museum 25 Queen Victoria Street Cape Town 8001
Attention	Kagiso Themba
Advert Date	19 June 2026
Closing Date and Time for Submission	30 June 2026 11h00am
Method of Delivery	Quotes / Proposals, and accompanying documentation, must be email SCM scm@iziko.org.za ; kthemba@iziko.org.za
Technical Enquiries	Fahrnaaz Johadien fjohadien@iziko.org.za
Name of Company	
CSD Supplier Number (MA Number)	
B-BBEE Status Level of Contribution	
Quote Price (Incl. VAT)	
Signature	

BIDDER’S DISCLOSURE (SBD 4)

1. PURPOSE OF THE FORM (SBD 4)

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. BIDDER’S DECLARATION

2.1. Is the bidder, or any of its directors / trustees / shareholder / members / partners or any person having a controlling interest in the enterprise, employed by the state?

YES/NO

2.1.1. If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State Institution

2.2. Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution?

YES/NO

2.2.1. If so, furnish particulars:

.....

2.3. Does the bidder or any of its directors / trustees / shareholders / members / partners or

any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

2.3.1. If so, furnish particulars:

.....
.....

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

3. DECLARATION

I, the undersigned, (name) .. in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1. I have read and I understand the contents of this disclosure;
- 3.2. I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3. 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 consortium will not be construed as collusive bidding.
- 3.4. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5. 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.
- 3.6. There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7. 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder (Company Name)¹

² 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.

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

- 1.1. The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
 - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2. To be completed by the organ of state

The applicable preference point system for this tender is the **80/20** preference point system.

- 1.3. Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price: and
- (b) Specific Goals

1.4. To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5. 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.
- 1.6. The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“The Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1. THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20 or 90/10

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) \text{ or } P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where:

P_s =Points scored for price of tender under consideration

P_t =Price of tender under consideration

P_{min} =Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

80/20 or 90/10

$$P_s = 80 \left(1 - \frac{P_t - P_{max}}{P_{max}} \right) \text{ or } P_s = 90 \left(1 - \frac{P_t - P_{max}}{P_{max}} \right)$$

Where:

P_s =Points scored for price of tender under consideration

P_t =Price of tender under consideration

P_{max} =Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/documentation stated in the conditions of this tender;
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of –
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Evidence	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of	<ul style="list-style-type: none"> Proof of B-BBEE certificate; Company Registration Certification Identification Documentation. CSD report 		

<p>Race: Black persons (ownership)*</p> <p>50% or more black ownership = 20 points</p> <p>Less than 50% black ownership = 10 points</p> <p>0% black ownership = 0 points</p>			
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DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm:

4.4. Company Registration number:

4.5. TYPE OF COMPANY/FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I 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 paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering 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) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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
- (e) forward the matter for criminal prosecution, if deemed necessary

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:.....

REQUEST FOR QUOTATION (RFQ) FOR A RISK MANAGEMENT WORKSHOP, RISK MATURITY ASSESSMENT AND COMBINED ASSURANCE REVIEW SERVICES

1. BACKGROUND IZIKO

Iziko Museums of South Africa (Iziko) is a schedule 3A public entity and non-profit organisation, partly subsidised by the National Department of Sport, Arts & Culture (DSAC), bringing together 11 national museums and a Social History Centre situated in the Western Cape under a single governance and leadership structure. Iziko was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and is required to comply with the Public Finance Management Act (PFMA), 1999 (Act No. 1 of 1999, as amended) and its concomitant Regulations.

2. DESCRIPTION

Iziko Museums of South Africa invites qualified, experienced and suitably qualified service provider to facilitate a two-day risk management workshop and provide technical support to finalise Iziko's risk management and combined assurance documents.

Iziko operates within a public finance, governance and service delivery environment that requires effective risk management, oversight, accountability and assurance. Risk management must support strategic planning, operational decision-making, performance delivery, compliance, financial sustainability, asset stewardship, heritage preservation and governance reporting.

The assignment must be practical, simplified and output-focused. Bidders must understand that the required output is not only workshop facilitation, but a completed risk management and combined assurance pack that can be used by management, EXCO, the Audit and Risk Committee and Council.

3. SCOPE OF WORKS

The service provider must conduct an independent assessment of Iziko's current risk tolerance and risk management maturity level and provide a practical improvement roadmap.

The appointed service provider will be required to provide a risk management intervention comprising preparation, workshop facilitation, risk document review and finalisation, independent maturity and tolerance assessment, combined assurance review and close-out reporting. The required services are as follows:

3.1. Inception and preparation

- Conduct an inception meeting with Iziko to confirm the project plan, workshop objectives, timelines, information requirements, reporting lines and deliverables.
- Review documents provided by Iziko, including strategic, operational, risk, assurance, audit and governance information relevant to the assignment.

- Prepare the workshop agenda, facilitation approach, templates and presentation material for the two-day risk management workshop.

3.2. Two-day risk management workshop

The service provider must facilitate a two-day risk management workshop for Iziko management and relevant officials. The date will be finalised after the procurement process and appointment of the service provider.

- confirmation of Iziko's strategic and operational risk context;
- review and validation of strategic risks and key operational risks;
- assessment of risk causes, consequences, likelihood, impact, existing controls and residual exposure;
- review of risk appetite and tolerance considerations;
- identification of risk treatment actions, owners, timelines and reporting requirements;
- alignment of risks to Iziko's Strategic Plan, Annual Performance Plan, governance obligations and operating environment;
- combined assurance principles and the role of management, risk management, compliance, internal audit, external audit and governance structures; and
- practical guidance on maintaining risk registers and reporting risk information after the assignment.

3.3. Review and finalisation of risk-related documents

The service provider must review, update and finalise the risk-related documents listed below, where provided by Iziko. The final documents must be clear, editable, internally consistent and suitable for governance review:

- Risk Management Policy;
- Risk Management Strategy and/or Risk Implementation Plan;
- Risk Management Methodology and Risk Rating Criteria;
- Strategic Risk Register;
- Operational Risk Registers;
- Risk Appetite and Risk Tolerance Statement;
- Risk Heat Map;
- Risk Reporting Templates and/or Governance Risk Dashboard;
- Risk Committee or relevant governance Terms of Reference, where applicable; and
- any related risk governance documents provided by Iziko.

3.3. Independent risk tolerance and risk maturity assessment

The service provider must conduct an independent assessment of Iziko’s risk tolerance and risk management maturity level. This assessment must be based on the workshop outcomes, document review, interviews or consultations where required, and a recognised risk maturity model, framework or methodology.

- mapping of key strategic risks to assurance providers;
- consideration of first line assurance by management;
- consideration of second line assurance by risk management, compliance, finance, SCM, HR, ICT and other oversight functions;
- consideration of third line assurance by internal audit;
- consideration of external assurance by external audit, DSAC or other oversight bodies where relevant;
- identification of assurance gaps, duplication and areas requiring stronger monitoring;
- alignment of the assurance plan to strategic risks, audit outcomes, compliance obligations and governance reporting; and
- preparation of a combined assurance matrix and/or plan suitable for submission to management and governance structures.

3.4 Council, Audit and Risk Committee and management reporting support

The service provider must provide presentation material and technical support for reporting the outputs of the assignment to EXCO, the Audit and Risk Committee, Council or any designated governance structure, where required by Iziko.

4. Expected Outputs and Deliverables

Deliverable	Minimum requirement
Inception note and project plan	Confirmed project plan, timelines, document request list, workshop agenda and roles and responsibilities.
Two-day risk management workshop	Facilitation of a practical two-day workshop with relevant Iziko participants, including workshop material, attendance register and facilitation notes.
Updated Strategic Risk Register	Reviewed and updated strategic risk register aligned to Iziko’s strategic objectives, APP context, key institutional risks, controls, residual ratings, owners and actions.
Updated Operational Risk Registers	Updated operational risk registers or consolidated operational risk inputs aligned to directorates/functions and relevant operational risk exposures.
Risk methodology and rating criteria	Reviewed methodology and risk rating criteria, including likelihood, impact, control effectiveness and residual risk treatment logic.
Risk Appetite and Tolerance Statement	Draft or updated institutional risk appetite and tolerance statement that is practical, understandable and aligned to Iziko’s mandate and operating environment.
Independent Risk Tolerance and Maturity Assessment Report	Independent assessment of current risk tolerance and risk maturity level, including maturity rating, gaps, target maturity level and improvement roadmap.

Deliverable	Minimum requirement
Combined Assurance Framework and Plan	Reviewed and updated Combined Assurance Framework and Plan, including an assurance matrix linked to key strategic risks and assurance providers.
Risk Heat Map and Governance Dashboard	Risk heat map and dashboard/reporting template for management, Audit and Risk Committee and Council reporting.
Workshop Outcome and Close-Out Report	Report summarising work performed, workshop outcomes, key observations, updated documents, unresolved matters, recommendations and implementation priorities.
Governance presentation material	Presentation pack for EXCO, Audit and Risk Committee and/or Council, where required by Iziko.
Risk Heat Map and Governance Dashboard	Risk heat map and dashboard/reporting template for management, Audit and Risk Committee and Council reporting
Workshop Outcome and Close-Out Report	Report summarising work performed, workshop outcomes, key observations, updated documents, unresolved matters, recommendations and implementation priorities
Governance presentation material	Presentation pack for EXCO, Audit and Risk Committee and/or Council, where required by Iziko.

5. PROJECT CHARTER

The successful service provider will be required to sign a project charter before commencement of the assignment. The project charter must define the project objectives, scope, methodology, timelines, deliverables, roles and responsibilities, reporting protocols, information access requirements, confidentiality obligations, quality assurance arrangements and the process for approving final deliverables.

6. REQUIRED EXPERTISE AND CAPACITY

- Enterprise risk management advisory and workshop facilitation experience.
- Public sector, public entity or regulated environment experience.
- Experience in reviewing and finalising risk registers, risk methodology, risk appetite and risk tolerance documentation.
- Experience in risk maturity assessments or independent risk governance assessments.
- Experience in combined assurance framework, combined assurance plan or assurance mapping work.
- Ability to produce governance-ready reports and presentation material for management, Audit and Risk Committee and Council structures.
- Ability to simplify technical risk management concepts for practical implementation by management.

7. ADMINISTRATIVE DOCUMENT

Service Providers must submit all documents as outlined in Table below:

1	Central Supplier Database Report – with supplier number and company details (www.csd.gov.za) and Tax Status Verification Pin together with tax registration number
2	Detailed pricing structure on your company letterhead: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement, and escalations, if applicable, etc.
3	A Valid B-BBEE Certificate or Sworn Affidavit to determine the Service provider's status level.
4	Signed Request for Quotation (RFQ) Document
5	Valid Tax Certificate and/or Tax Pin
6	SBD 4 and SBD 6.1 documentation included in this RFQ
7	CVs and qualifications/certifications of key personnel assigned to the project.
8	Evidence of similar completed assignments : Minimum 3 References
9	Independence and conflict-of-interest declaration.

Note: Failure to supply any of the administrative documents stipulated may lead to the quote not being considered.

8. MANDATORY REQUIREMENTS

Requirement	Evidence required
CSD and tax compliance	CSD report and valid tax pin.
Completed and signed bid documents	Signed RFQ, SBD 4 and SBD 6.1.
Company profile and methodology	Company profile and methodology addressing the scope of this RFQ.
Key personnel	CVs of the proposed engagement lead and key personnel assigned to the project.
Independence	Signed declaration of no conflict with Iziko, officials, Council members, SCM personnel or any matter that may impair independence.

9. EVALUATION CRITERIA

No.	Functionality criterion	Weight
1	Company experience in enterprise risk management, risk workshop facilitation, risk governance reviews, risk maturity assessment and/or combined assurance assignments.	25
2	Technical methodology and implementation approach for the two-day workshop, document review and finalisation, risk maturity assessment, risk tolerance assessment and combined assurance review.	35
3	Key personnel qualifications and experience, including the engagement lead and specialists responsible for ERM, risk maturity assessment and combined assurance.	30
4	Quality of proposed deliverable management, reporting, simplification of outputs, project plan and governance-readiness of final documents.	10
Total		100

10. DETAILED SCORING AND GUIDELINES

Criterion	Maximum points	Scoring guidance
Company experience	25	<p>25 points: The bidder provides evidence of at least three relevant assignments completed within the last five years. Assignments must be directly aligned to the scope and must include at least three of the following: ERM workshop facilitation, strategic / operational risk register review, risk governance documentation, risk maturity assessment, risk appetite / tolerance work, combined assurance framework review, or governance reporting support. Evidence must clearly indicate the client, period, nature of work, deliverables and relevance to the RFQ.</p> <p>18 points: The bidder provides evidence of two relevant assignments completed within the last five years and sufficiently aligned to the scope.</p> <p>10 points: The bidder provides evidence of one relevant assignment, or experience that is only partially aligned to the required scope. 0 points: No relevant experience is demonstrated, or no supporting evidence is provided.</p>
Technical methodology and approach	35	<p>This criterion will be evaluated against the measurable sub-components below. The proposal must explain how the bidder will perform the assignment, not merely repeat the RFQ requirements:</p> <p>2.1 Work plan and implementation schedule (7)</p> <p>7 points: Provides a clear work plan showing activities, timelines, responsible personnel and deliverables for the full assignment, including preparation, two-day workshop, document review, risk register finalisation, maturity / tolerance assessment, combined assurance review and final reporting.</p> <p>4 points: Provides a work plan covering most activities, but with limited detail on timelines, responsibilities or deliverables.</p> <p>2 points: Provides a high-level or generic work plan.</p> <p>0 points: No credible work plan provided.</p> <p>2.2 Two-day workshop agenda and facilitation process (7)</p> <p>7 points: Provides a proposed two-day workshop agenda and facilitation process showing workshop objectives, participants, topics, risk identification / review process, risk rating process, treatment planning and expected workshop outputs.</p> <p>4 points: Provides a workshop agenda, but the facilitation process or expected outputs are not sufficiently clear.</p> <p>2 points: Provides a generic workshop outline with limited</p>

Criterion	Maximum points	Scoring guidance
		<p>relevance to the assignment.</p> <p>0 points: No workshop agenda or facilitation process provided.</p> <p>2.3 Risk register and risk governance output templates (7)</p> <p>7 points: Provides sample templates or examples for key outputs, including a risk register, risk treatment plan, risk appetite / tolerance schedule, risk maturity assessment report and governance reporting format.</p> <p>4 points: Provides some relevant templates, but not for all key outputs.</p> <p>2 points: Provides generic or incomplete templates.</p> <p>0 points: No relevant templates or sample outputs provided.</p> <p>2.4 Risk maturity and risk appetite / tolerance assessment tool (6)</p> <p>6 points: Provides a clear assessment tool, checklist, scoring matrix or framework showing how risk maturity and risk appetite / tolerance will be assessed, scored and reported.</p> <p>4 points: Provides an assessment approach, but the scoring, evidence requirements or reporting format are not fully clear.</p> <p>2 points: Provides a generic description without a clear assessment tool or scoring basis.</p> <p>0 points: No credible maturity or appetite / tolerance assessment tool provided.</p> <p>2.5 Combined assurance review tool or matrix (4)</p> <p>4 points: Provides a combined assurance review tool, matrix or template showing how assurance providers, key risks, assurance coverage, gaps, duplication and reporting responsibilities will be assessed.</p> <p>2 points: Provides a limited combined assurance approach, but no clear tool or matrix.</p> <p>1 point: Mentions combined assurance only briefly.</p> <p>0 points: No credible combined assurance tool or approach provided.</p> <p>2.6 Quality assurance and final reporting process (4)</p> <p>4 points: Provides a quality assurance process showing review responsibilities, version control, management review points and final sign-off before submission of deliverables.</p>

Criterion	Maximum points	Scoring guidance
		<p>2 points: Provides limited quality assurance or review arrangements.</p> <p>1 point: Mentions quality assurance only generally.</p> <p>0 points: No quality assurance or final reporting process provided.</p> <p>For purposes of scoring this criterion, bidders must submit practical supporting evidence such as proposed agendas, work plans, templates, tools, scoring matrices, sample report formats or similar prior outputs. The Evaluation Committee will score the evidence submitted, not the bidder's general narrative. A proposal that only restates the RFQ scope without providing practical tools, templates or a clear work plan should not receive full scores.</p>
Key personnel	30	<p>This criterion will be scored based on the qualifications, experience and suitability of the individuals proposed to perform the assignment. Bidders must submit CVs and proof of relevant qualifications or professional designations. Points will be awarded based on the proposed personnel, not only the general profile of the bidding firm.</p> <p>The proposed team is suitably qualified and experienced to perform the assignment. The engagement lead holds a directly relevant professional qualification or designation, such as CA(SA), CIA, CRMA, CRM Prac, CRM Prof, RIMS-CRMP, IRM Enterprise Risk Management qualification, CRISC, CGISA / Chartered Governance Professional, or an equivalent risk, audit, accounting or governance designation.</p> <p>30 Points: The engagement lead has at least seven years' senior experience in ERM, internal audit, risk governance, governance reporting, combined assurance or public sector advisory work. The proposed team's CVs demonstrate practical experience in ERM risk assessments, facilitated risk workshops, risk register review, risk treatment planning, governance reporting, Audit and Risk Committee reporting, combined assurance, risk maturity assessment or risk appetite / tolerance work. The proposal clearly identifies each team member, their role, responsibilities, level of involvement and availability for the assignment.</p> <p>22 points: The proposed team is suitably qualified and experienced in most respects, but there are minor gaps in specialist coverage, seniority, role clarity or evidence of direct experience in one of the required areas, such as combined assurance, maturity assessment or risk appetite / tolerance work.</p> <p>15 points: The proposed team has some relevant qualifications and experience, but the evidence is limited or only partially aligned to the assignment. The team may have general audit, compliance, governance or advisory experience, but limited demonstrated</p>

Criterion	Maximum points	Scoring guidance
		ERM-specific experience, workshop facilitation experience or governance reporting experience. 0 points: CVs or proof of qualifications are not submitted, the engagement lead is not clearly identified, or the proposed team does not demonstrate the required qualifications, experience or capability to perform the assignment.
Deliverable management and reporting quality	10	10 points: Proposal provides a clear deliverable tracker, project plan, quality assurance process, governance reporting approach and examples/descriptions of final outputs that will be simple, usable and governance-ready. 6 points: Proposal addresses deliverables and reporting, but lacks detail on quality assurance or governance-readiness and timelines. 3 points: Proposal provides limited deliverable management detail. 0 points: No credible deliverable management or reporting approach.

Bidders must provide documentary evidence for all claims made under functionality. Iziko will not award points for unsupported statements, generic company profiles, or proposal wording that merely repeats the RFQ requirements.

Iziko promotes the concept of “best value” in the award of contracts, as opposed to merely looking for the cheapest price, which does not necessarily provide the best value. Best value incorporates the expertise, experience and technical proposal of the organisation and individuals who will be providing the service and the organisational capacity supporting the project team.

11. PREFERENTIAL POINTS

Proposals will be evaluated on the 80/20 preference points scoring system: that is, 80% of the points awarded will be based on price, as indicated in the table below; and 20% of the points awarded will be based on specific goals, allocated as indicated in the table below:

	Specific goals allocated points	Price
Total maximum points	20	80

Iziko is committed to achieving Government’s transformation objectives in terms of the Preferential Procurement Policy Framework Act.

12. PRICING SCHEDULE

Provide a full cost for the described service, including any incidentals such as travel costs, (including on site hours) equipment, hardware etc. inclusive of VAT/applicable taxes

No	Service component	Pricing requirement	Bidders price
1	Inception and preparation	Fixed fee for inception meeting, project plan, information request, workshop design, agenda and preparation of templates/materials.	R
2	Two-day risk management workshop	Fixed fee for facilitation of a two-day risk management workshop, including preparation, workshop material, attendance register and facilitation notes.	R
3	Review and finalisation of risk management documents	Fixed fee to review, update and finalise the Risk Management Policy, Risk Management Strategy/Implementation Plan, Risk Methodology and Rating Criteria, Strategic Risk Register, Operational Risk Registers, Risk Appetite and Tolerance Statement, Risk Heat Map and Risk Reporting Templates/Governance Dashboard, where provided by Iziko.	R
4	Independent risk tolerance and maturity assessment	Fixed fee for independent assessment of Iziko's risk tolerance and risk maturity level, including maturity rating, gap analysis, target maturity level and improvement roadmap.	R
5	Combined Assurance Framework and Plan review	Fixed fee to review and update the Combined Assurance Framework, Combined Assurance Plan and/or assurance matrix linked to key strategic risks and assurance providers.	R
6	Workshop outcome, close-out report and governance presentation	Fixed fee for final close-out report, implementation roadmap and presentation material for EXCO, Audit and Risk Committee and/or Council.	R
7	Disbursements	Disbursements must be disclosed upfront and capped at [insert percentage, e.g. 5%] of the fixed fee. Disbursements will only be paid if pre-approved in writing by Iziko and supported by documentation.	R
8	Total Cost (Excl. VAT)		R
9	VAT (15%)		R
10	Total Cost (Incl Vat)		R

Pricing Instruction

1. The Total Evaluated Bid Price will be used to calculate price points under the 80/20 preference point system. Only amounts captured on this table will be considered.
2. Bidders must include all workshop preparation, facilitation, document review, document finalisation, meetings, reporting, presentation material, quality review and VAT in the quoted price.
3. Iziko may withhold payment for a deliverable until the deliverable is submitted and accepted as complete by the project manager.
4. Bidders must attach a breakdown of assumptions, resource categories and rates used to prepare their pricing.

Please Note: a formal detailed quotation valid for at least 60 days to be sent with proposal. The pricing schedule above and formal quotation must include all applicable costs and there can be no variation after award has been made.

Please note that the service will be rendered in Cape Town – South Africa.

13. FORMAL CONTRACT

- a) The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider
- b) A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider/s.

14. GENERAL PRINCIPLES

- (a) The lowest or only quotation received will not necessarily be accepted.
- (b) Iziko and its Council reserves the right to accept or reject any quotation in response to the Request to Quote and to withdraw its decision to seek the provision of these services at any time.

15. DECLARATION

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise:

- i) confirms that neither the name of the enterprise or the name of any partner, manager, director, or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;
- ii) confirms that no partner, member, director, or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iii) confirms that I / we are not associated, linked, or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers

or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest; and;

- iv) confirms that the contents of these questionnaire/forms (SBD 4, & 6.1) are within my personal knowledge and are to the best of my belief both true and correct:
- v) accept that, in addition to cancellation of a contract, action may be taken against me should the Declaration prove to be false.

Signed _____ Date _____

Name _____ Position _____

Enterprise name _____

Please note that if the supporting documentation is not provided then the submission will be classified as non-responsive.

1. Disqualification

Please note that if a bid document is not filled in correctly or completely, or complied with the specification, or is delivered/send after the bid closing date and time, or the supplier is not registered on the CSD or supplier has a non-compliant tax status, then unfortunately that bidder maybe disqualified. Please return this document with the supporting documents.

2. Bid Document Submission

Emailed tender documents will be accepted. However, the onus is on the tenderer to ensure that complete email documents have been received by the IZIKO by the due date and time. Please note that any alterations to the tender document other than filling in the tenderer's details and tender price will automatically disqualify the tenderer.