



# LEJWELEPUTSWA DISTRICT MUNICIPALITY

## APPOINTMENT OF A PANEL OF TRANSACTION ADVISORY SERVICES FOR LEJWELEPUTSWA DISTRICT MUNICIPALITY FOR A PERIOD OF 3 YEARS AT A RISK BASIS.

CONTRACT NO: RFP 162/07/2025

### TENDER SUBMITTED BY:

Name of Company

\_\_\_\_\_

Address

\_\_\_\_\_

Telephone Number

\_\_\_\_\_

Tender Amount (Including  
VAT)

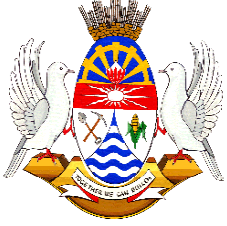
N/A

\_\_\_\_\_

ISSUED BY:	PREPARED BY:
<b>LEJWELEPUTSWA DISTRICT MUNICIPALITY</b>  Physical Address: Corner Jan Hofmeyer and Tempest Road Welkom 9460  Postal Address: P.O. Box 2163 Welkom 9460  Telephone: 057 391 8906 Facsimile: 086 547 8092	<b>TECHNICAL DEPARTMENT</b>  <b>LEJWELEPUTSWA DISTRICT MUNICIPALITY</b> Physical Address: Corner Jan Hofmeyer and Tempest Road Welkom 9460  Contact Person: Brian Lehlekiso Contact No.: 081 047 8265

**CLOSING DATE: 08 AUGUST 2025**

**CLOSING TIME: 12:00 pm**



# LEJWELEPUTSWA DISTRICT MUNICIPALITY

## *Office of the District Municipal Manager*

Cnr. Jan Hofmeyer & Tempest Road  
P.O. Box 2163  
WELKOM  
9460  
Tel: (057) 108 5000  
Fax: (057) 353 3382

### **REQUEST FOR PROPOSAL**

### **RFP 162/07/2025: APPOINTMENT OF A PANEL OF TRANSACTION ADVISORY SERVICES FOR LEJWELEPUTSWA DISTRICT MUNICIPALITY FOR A PERIOD OF 3 YEARS AT A RISK BASIS.**

#### **The Following Conditions will apply:**

- This proposal will be evaluated in terms of **compliance** and **functionality** in terms of LDM Preferential Procurement Policy of 2022 and Supply Chain Management Policy, and for this purpose the **MBD1, MBD4, MBD6.1, MBD8 and MBD9** must be scrutinized, completed and submitted together with your proposal. **Non-adherence to this request will lead to disqualification.**
- In order to claim preference points for specific goals. **1. B-BBEE** (10) a valid original or certified B-BBEE status level verification certificate (SANAS accredited) or a sworn affidavit completed on the DTI format must be submitted to validate the claim. **2. Locality** (10) The tenderer shall submit a Municipal Billing Clearance Certificate/municipal rates and service charges statement (not in arrears for more than 90 days), if renting a lease agreement and owner's copy of up-to-date municipal rates and service charges (not in arrears for more than 90 days). Should the tenderer not be based in the Lejweleputswa District Municipality, he shall submit a Municipal Billing Clearance Certificate issued by the municipality in which he/she is based.
- A valid SARS Tax Clearance Certificate and the tax compliance status pin to be submitted. It is the responsibility of the bidder to ensure that the company's Tax Status remains **compliant** at **ALL** times.
- The National Treasury Central Supplier Database Summary report must be submitted.
- The validity period for submission must be **90 days** from the closing date.
- A tender offer not satisfying the stated eligibility criteria will be eliminated.
- Tenders that are deposited in the incorrect tender box or delivered at any other venue will not be considered.

**NB:** No proposals will be considered from the person in the service of the state.  
No late proposals will be considered.

**Enquiries:** Technical matters – **Mr. LB Lehlekiso** ([brian@lejwe.co.za](mailto:brian@lejwe.co.za))  
: SCM matters – **Mr. M Macholo** ([malemoha@lejwe.co.za](mailto:malemoha@lejwe.co.za))

Completed tenders in a **sealed** envelope endorsed "**APPOINTMENT OF A PANEL OF TRANSACTION ADVISORY SERVICES FOR LEJWELEPUTSWA DISTRICT MUNICIPALITY FOR A PERIOD OF 3 YEARS AT A RISK BASIS.**", must be placed in the Tender Box Corner Jan Hofmeyer and Tempest Road, Welkom, 9460 or posted to PO Box 2163, Welkom, 9460 on or before **Friday, 08 August 2025 at 12:00 pm.**

Tender documents will only be obtained from the **e-tender portal.**

**Mr. ML MAKHETHA**  
**DISTRICT MUNICIPAL MANAGER**

# INVITATION TO BID – MBD 1

## PART A

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE LEJWELEPUTSWA DISTRICT MUNICIPALITY					
BID NUMBER:	<b>RFP NO. 162-07-2025</b>	CLOSING DATE:	<b>08/08/2025</b>	CLOSING TIME:	<b>12:00</b>
DESCRIPTION	<b>APPOINTMENT OF A PANEL OF TRANSACTION ADVISORY SERVICES FOR LEJWELEPUTSWA DISTRICT MUNICIPALITY FOR A PERIOD OF 3 YEARS AT A RISK BASIS.</b>				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).					

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT **Corner Jan Hofmeyer and Tempest Road, Welkom, 9460**

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	Yes <input type="checkbox"/> No <input type="checkbox"/>		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		Yes No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	Yes No  [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		Yes No  [IF YES, ANSWER PART B:3 ]
TOTAL NUMBER OF ITEMS OFFERED			TOTAL BID PRICE		R N/A
SIGNATURE OF BIDDER	.....		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL INFORMATION MAY BE DIRECTED TO:		
DEPARTMENT	FINANCE		DEPARTMENT	TECHNICAL SERVICES	
CONTACT PERSON	Mr. M Macholo		CONTACT PERSON	Mr. Brian Lehlekiso	
E-MAIL ADDRESS	<a href="mailto:malemoha@lejwe.co.za">malemoha@lejwe.co.za</a>		E-MAIL ADDRESS	<a href="mailto:brian@lejwe.co.za">brian@lejwe.co.za</a>	

**PART B**  
**TERMS AND CONDITIONS FOR BIDDING**

**1. BID SUBMISSION:**

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR ONLINE**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

**2. TAX COMPLIANCE REQUIREMENTS**

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE [WWW.SARS.GOV.ZA](http://WWW.SARS.GOV.ZA).
- 2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3.
- 2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

**3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

- 3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO
- 3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
- 3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
- 3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO
- 3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO

**IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.**

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**  
**NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.**

<b>SIGNATURE</b>		<b>NAME (PRINT)</b>	
<b>CAPACITY</b>		<b>DATE</b>	
<b>NAME OF FIRM</b>			

#### DECLARATION OF INTEREST – MBD 4

1. No bid will be accepted from persons in the service of the state.
2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make any offer or offers in terms of this invitation to bid. In view of possible allegations of favoritism, should the resulting bid, or part thereof be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorized representative declare their position in relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest.
3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

3.1	Full Name of Bidder/ Representative	
3.2	Identity Number	
3.3	Position Held in Company E.g. Director	
3.4	Company Registration Number	
3.5	Tax Reference Number	
3.6	VAT Registration Number	

3.7	The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.		
3.8	Are you presently in the service of the State?	Yes	No
3.8.1	If so, furnish particulars		
3.9	Have you been in the service of the state for the past twelve months?	Yes	No
3.9.1	If so, furnish particulars		
3.10	Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid?	Yes	No
3.10.1	If so, furnish particulars		

3.11	Are you aware of any relationship (family, friend, other) between bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid?	Yes	No
3.11.1	If so, furnish particulars		
3.12	Are any of the company's director, managers, principle shareholders or stakeholders in service of the state:	Yes	No
3.12.1	If so, furnish particulars		
3.13	Are any spouse, child or parent of the company's director's trustees, managers, principle shareholders or stakeholders in service of the state?	Yes	No
3.13.1	If so, furnish particulars		
3.14	Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract?	Yes	No
3.14.1	If so, furnish particulars		

4. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	State Employee Number

\*MSCM Regulations: "in the service of the state" means to be –

- (a) A member of –
  - (i) any municipal council:
  - (ii) any provincial legislature: or
  - (iii) the national Assembly or the national Council of provinces:
- (b) a member of the board of directors of any municipal entity
- (c) an official of any municipality or municipal entity
- (d) an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act 1999 (Act N° 1 of 1999):
- (e) a member of the accounting authority of any national or provincial public entity: or
- (f) An employee of Parliament or a provincial legislature

## 5. DECLARATION

I, the undersigned (name) \_\_\_\_\_,

certify that the information furnished in paragraph 3 is correct.

I accept that the State may act against should this declaration prove to be false.

SIGNATURE		NAME (PRINT)	
CAPACITY		DATE	
NAME OF FIRM			

**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**

- a) The applicable preference point system for this tender is the **90/10** preference point system. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

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	90
SPECIFIC GOALS – B-BBEE	5
SPECIFIC GOALS – LOCALITY	5
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)} \end{array}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = 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:

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right) & \text{or} & Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right) \end{array}$$

Where

- Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration  
Pmax = 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	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
B-BBEE	5	10		
Locality	5	10		

#### **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
- ☐ Close corporation
- ☐ 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:** .....

.....

.....

.....

## 8. DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES – MBD 8

1. This Municipal Bidding Document must form part of the bids invited.
2. It serves as a declaration to be used by municipalities and municipal entities 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 rejected if that bidder or any of its directors have:
  - (a) abused the municipality's / municipal entity's supply chain management system or committed an improper conduct in relation to such system;
  - (b) been convicted for fraud or corruption during the past five (5) years;
  - (c) wilfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five (5) years, or
  - (d) been listed in the Register for Tender Defaulters in terms of Section 29 of the Prevention and Combating of Corrupt Activities Act (No. 12 of 2004)
4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid:

Item	Question	Response	
4.1	Is the bidder or any of its directors listed on the National Treasury's database as a company or person prohibited from doing business with the public sector?  <b>(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied)</b>	<b>YES</b> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/>
4.1.1	If so, furnish particulars		
4.2	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 Corrupt Activities Act (No. 12 of 2004)?  <b>(To access this Register enter the National Treasury's website <a href="http://www.treasury.gov.za">www.treasury.gov.za</a>, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number 012-3265445)</b>	<b>YES</b> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/>
4.2.1	If so, furnish particulars		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five (5) years?	<b>YES</b> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/>
4.3.1	If so, furnish particulars		

4.4	Does the bidder or any of its directors owe any municipal rates and taxed or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity that is in arrears for more than three (3) months?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
4.4.1	If so, furnish particulars		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of the State terminated during the past five (5) years on account of failure to perform on or comply with the contract?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
4.5.1	If so, furnish particulars		

### CERTIFICATION

I, THE UNDERSIGNED (Name) .....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS CORRECT.

I ACCEPT THAT THE STATE MAY ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

<b>SIGNATURE</b>		<b>NAME (PRINT)</b>	
<b>CAPACITY</b>		<b>DATE</b>	
<b>NAME OF FIRM</b>			

## **9. CERTIFICATE OF INDEPENDENT BID DETERMINATION – MBD 9**

- 1 This Municipal Bidding Document (MBD) must form part of all bids 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). Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
  - a. take all reasonable steps to prevent such abuse;
  - b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
  - c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.
- 4 This MBD 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 (MBD 9) must be completed and submitted with the bid:

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

**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:

---

(Bid Number and Description)

in response to the invitation for the bid made by:

---

(Name of Municipality / Municipal Entity)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: \_\_\_\_\_ that:

(Name of Bidder)

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 consortium<sup>3</sup> 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.

**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.**

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		NAME (PRINT)	
CAPACITY		DATE	
NAME OF FIRM			

## PROOF OF GOOD STANDING WITH MUNICIPAL ACCOUNTS

The tenderer is to affix to this page either:

- 1) Proof that they are not in arrears for more than 90 days with municipal rates and taxes and municipal service charges. The latest municipal account is to be attached. **Attach latest municipal account statement behind this page. The statement must not be older than three months from the close of this tender.**; or
- 2) Signed copy of the lease agreement if the tenderer is currently leasing premises and not responsible paying municipal accounts **together with a letter from the landlord** (not older than three months) stating that no levies are in arrears (*only if applicable*); or

Note:

- Failure to affix such documentation as prescribed to this page shall result in this tender not being further considered for the award of the contract.
- Should this tender be considered for award of the contract, based on proof of submission and should proof of such submission be found to be invalid, erroneous or inaccurate, this tender will no longer be considered for the award of the contract.
- Statement must not be older than three months from the closing date of this tender.

I, \_\_\_\_\_  
(Full name in block letters) the undersigned, certify that the information furnished on this declaration form is correct and that I / we have no undisputed commitments for municipal services towards a municipality in respect of which payment is overdue for more than 90 days (30 days if the tender price exceeds R10 Million).

SIGNATURE		NAME (PRINT)	
CAPACITY		DATE	
NAME OF FIRM			

## 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.

A Company	B Partnership	C Joint Venture	D Sole Proprietor	E Close Corporation

### A. Certificate for Company

I, ....., chairperson

of the board 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 this tender for RFP No. 131/02/2023 and any contract resulting from it on behalf of the company.

#### As witnesses:

1. ....

Chairman: .....

2. ....

Date: .....

### B. 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 this tender For RFP NO. 131/02/2023 and any contract resulting from it on our behalf.

Name	Address	Signature	Date

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

**C. 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 this tender for Contract No. 12/2021 and any contract resulting from it on our behalf.

This authorisation is evidenced by the attached power of attorney signed by legally authorized signatories of all the partners to the Joint Venture.

Name of Firm	Address	Authorising Name and Capacity	Authorising Signature
Lead Partner:			

**D. Certificate for Sole Proprietor**

I, ..... , hereby confirm that I am

the sole owner of the business trading as .....

**As witnesses:**

1. ....

Sole Owner: .....

2. ....

Date: .....

**E. 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 to sign all documents in connection with this tender for RFP NO. 131/02/2023 and any contract resulting from it on our behalf.

Name	Address	Signature	Date

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

## BEE RATING CERTIFICATE

1. Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or certified copies thereof together with their bids, to substantiate their B-BBEE rating claims,
2. Bidders who do not submit B-BBEE Status Level Verification Certificates or are non-compliant contributors to B-BBEE do not qualify for preference points for B-BBEE but will not be disqualified from the bidding process. They will score points out of 90 or 80 for price only and zero (0) points out of 5 or 10 for B-BBEE,
3. A trust, consortium or joint venture must submit a consolidated B-BBEE Status Level Verification Certificate.
4. AOs / AAs must ensure that the B-BBEE Status Level Verification Certificates submitted are issued by the following agencies
  - a. Tenderers other than EMEs
    - i. Verification agencies accredited by SANAS; or
  - b. Tenderers who qualify as EMEs (total revenue of R10 million or less)
    - i. Sworn affidavit signed by the EME representative and attested by a Commissioner of oaths.

**Tenderers are to note that copies of certified documents will not be accepted.**

**Attach a valid BEE Rating Certificate behind this page.**

<b>SIGNATURE</b>		<b>NAME (PRINT)</b>	
<b>CAPACITY</b>		<b>DATE</b>	
<b>NAME OF FIRM</b>			

## BANKING DETAILS

It is the policy of the LEJWELEPUTSWA District Municipality to pay all creditors by means of direct bank transfers. Please complete this information and acquire your banker's confirmation.

ACCOUNT HOLDER	
NAME OF BANK	
ACCOUNT NUMBER	
ACCOUNT TYPE	
BRANCH NAME	
BRANCH CODE	
BRANCH CONTACT PERSON	
PHONE NUMBER	

I/we hereby request and authorize the LEJWELEPUTSWA District Municipality to pay any amounts that may accrue to me/us to the credit of my/our bank account.

I/we further undertake to inform the LEJWELEPUTSWA District Municipality in advance of any change in my/our bank details and accept that this authority may only be cancelled by me/us by giving thirty days' notice by prepaid registered post.

Alternatively, the tenderer may submit a letter/declaration from his bank worded as above, providing the required details and signed by an appropriate Bank Official (attached behind this page).

**FOR BANK USE ONLY**

<p>I/we hereby certify that the details of our clients bank account as indicated above is correct:</p> <p>.....</p> <p>AUTHORIZED SIGNATURE(S)</p>	<p>OFFICIAL DATE STAMP</p>
--	----------------------------

## JOINT VENTURE AGREEMENT

This returnable schedule is to be completed by joint ventures.

We, the undersigned, are submitting this tender offer in joint venture and hereby authorize Mr./Ms. ...., authorized signatory of the company, close corporation or partnership ...., acting in the capacity of lead partner, to sign all documents in connection with the tender offer and any contract resulting from it on our behalf.

NAME OF FIRM	ADDRESS	DULY AUTHORIZED SIGNATORY
Lead Partner		Signature:
		Name:
		Designation:
		Signature:
		Name:
		Designation:
		Signature:
		Name:
		Designation:

### **Note:**

A copy of the Joint Venture Agreement showing clearly the percentage contribution of each partner to the Joint Venture shall be appended to this schedule.

Service providers intending to tender in the form of Joint Ventures/Consortiums must submit the following documentation together with the tender:

- Original and valid tax clearance certificate of all parties of the Joint Venture/Consortium;
- An undertaking duly signed by all parties of the Joint Venture/Consortium indicating their intention to enter into an agreement for the purposes of the contract and;
- A consolidated valid and original or certified copy of their B-BBEE Status level verification certificate obtainable from a verification agency accredited by SANAS or a registered auditor approved by the Independent Regulatory Board of Auditors (IRBA);
- Bank rating of all parties of the Joint Venture/Consortium or the bank rating of the joint venture bank account– if applicable;
- Letter of “Good standing” from the Entity’s Financial Institution (Bank) of all parties of the Joint

Venture/Consortium– if applicable;

- Proof of good standing with municipal accounts of all parties of the Joint Venture/Consortium;
- Declaration of interest of all parties of the Joint Venture/Consortium;
- Declaration of bidder's past supply chain management practices of all parties of the Joint Venture/Consortium;
- Certificate of independent bid determination of all parties of the Joint Venture/Consortium.

Further to the above, the name of the Joint Venture/Consortium must appear on the relevant pages of the document. Failure to comply with these requirements shall lead to disqualification.

<b>SIGNATURE</b>		<b>NAME (PRINT)</b>	
<b>CAPACITY</b>		<b>DATE</b>	
<b>NAME OF FIRM</b>			



## EXPERIENCE OF TENDERER

The following is a statement of work of a similar nature (E.g. Transactional Advisor) successfully executed by myself / ourselves within the past 5 years with a minimum value of R 10 000 000.00:

EMPLOYER: CONTACT PERSON AND TELEPHONE NUMBER	DESCRIPTION OF WORK	VALUE OF WORK (inclusive of VAT)	COMPLETION DATE
(Client)			
(Contact Person)			
(tel.)			
(email)			
(Client)			
(Contact Person)			
(tel.)			
(email)			
(Client)			
(Contact Person)			
(tel.)			
(email)			
(Client)			
(Contact Person)			
(tel.)			
(email)			

Bidders must have specific experience and submit references letters (in a form of written proof/(s) on organization's letterhead including relevant contact person, nature of service, contract amount, commencement date, telephone number, fax number and email addresses) of similar work undertaken.

SIGNATURE: .....  
(of person authorized to sign on behalf of the Tenderer)

DATE: .....

### EXPERIENCE OF TENDERER (Cont.)

The following is a statement of work of a similar nature (E.g. Transactional Advisor) successfully executed by myself / ourselves within the past 5 years with a minimum value of R 10 000 000.00:

EMPLOYER: CONTACT PERSON AND TELEPHONE NUMBER	DESCRIPTION OF WORK	VALUE OF WORK (inclusive of VAT)	COMPLETION DATE
(Client)			
(Contact Person)			
(tel.)			
(email)			
(Client)			
(Contact Person)			
(tel.)			
(email)			
(Client)			
(Contact Person)			
(tel.)			
(email)			
(Client)			
(Contact Person)			
(tel.)			
(email)			

Bidders must have specific experience and submit references letters (in a form of written proof/(s) on organization's letterhead including relevant contact person, nature of service, contract amount, commencement date, telephone number, fax number and email addresses) of similar work undertaken.

SIGNATURE: .....  
(of person authorized to sign on behalf of the Tenderer)

DATE: .....

## REFERENCE LETTERS

Bidders must have **specific experience** (E.g. Transactional Advisor) and submit recent references (in a form of written proof/(s) on organization's letterhead including relevant contact person, nature of service, contract amount, commencement date, telephone number, fax number and email addresses) of similar work undertaken.

Reference Letters must make reference to the nature of the works or services undertaken as well as the total value of the works executed by the bidder.

Reference Letters are to be signed by the referee (either the Director/Manager of the firm/entity or their delegated official) and dated.

**Bidders are to note that appointment letters/purchase orders will not be accepted in lieu of reference letters.**

Clients may further include on such written references their rating of the Bidder according to any of the following criteria:

- i. Turn-around times
- ii. Quality of feedback
- iii. Accessibility and availability
- iv. Reliability
- v. Customer satisfaction

Attach Letters of Reference to this page.

SIGNATURE		NAME (PRINT)	
CAPACITY		DATE	
NAME OF FIRM			

**RECORD OF ADDENDA**

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.

	Date	Title or Details
1.		
2.		
3.		
4.		
5.		

*Attach additional pages if more space is required.*

**Failure to acknowledge any addendum released by LEJWELEPUTSWA District Municipality may result in your tender submission being declared non-responsive.**

<b>SIGNATURE</b>		<b>NAME (PRINT)</b>	
<b>CAPACITY</b>		<b>DATE</b>	
<b>NAME OF FIRM</b>			

## ELIGIBILITY CRITERIA

Tender offers will only be accepted if:

1. The tenderer must be compliant in their tax matters with the South African Revenue Services (SARS).
2. The tenderer or any of its directors/shareholders is not listed on the Register of Tender Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 person prohibited from doing business with the public sector.
3. The tenderer has not:
  - i. abused the Employer's Supply Chain Management System; or
  - ii. failed to perform on any previous contract and has been given a written notice to this effect.
4. The tenderer is registered on the Central Supplier Database.
5. The tenderer is not in arrears for more than 90 days with municipal rates and taxes and municipal service charges. The latest municipal account is to be attached. The statement must not be older than three months from the closing date of this tender. Alternatively, if the tenderer is currently leasing premises and is not responsible for the payment of municipal services, a copy of the Lease Agreement must be attached.
6. A Joint-Venture Agreement, if applicable, is submitted with tender.
7. Tenderers are required to submit a minimum of three written testimonials from clients to substantiate their ability to undertake the required services, proof in providing engineering consultations within the past 5 years with a minimum value of R 10 000 000.00.
8. Tenderers must be registered with CESA (Consulting Engineers South Africa) , Proof of registration must be submitted with the bid submission, and failure to do so will result in disqualification of the bid.
9. The following schedules are fully completed and signed:
  - i. Invitation to bid – MBD 1
  - ii. Declaration of interest – MBD 4
  - iii. Preference points claim form – MBD 6.1
  - iv. Declaration of bidder's past supply chain management practices - MBD 8
  - v. Certificate of independent bid determination – MBD 9
  - vi. Proof of good standing with municipal accounts
  - vii. Authority for signatory
  - viii. Joint venture agreement (if applicable)
  - ix. Record of addenda

## FUNCTIONALITY TEST

Service Providers will be evaluated in terms of functionality as part of the minimum requirements before evaluated on price as follows:

<b>EVALUATION CRITERION FOR FUNCTIONALITY</b>		
<b>Evaluation Criteria</b>	<b>Guidelines</b>	<b>Maximum Points</b>
<b>Experience of Company in execution &amp; management of projects of a similar nature.</b>  <b>Provide reference letters</b>  <b>10 points per reference letter. 5 letters = 50 points.</b>	<p>The bidder's proven competency in rendering a similar service, extensive knowledge of the project proven by the number of years of experience in the industry including history, group structure, operations, logistics and services and number of projects completed.</p> <p>At least 5 detailed references from clients detailing the actual work completed relating to similar projects.</p> <p>The reference letters must be in a company's letterhead and must include the company name, Contactable references and contact numbers, duration of the contract and value of the contract.</p>	50
<b>Capacity and experience of team members</b>  <b>Key Experts Qualifications, Skills and Experience</b>	<p>Expertise, experience / qualifications of Team leader, and support personnel to be assigned to the contract.</p> <p>Key experts required are;            Key expert 1 (Project/Team Leader = 20 points),            Key expert 2 (Civil Engineer = 10 points),            Key expert 3 (Financial Analyst = 10 points),            Key expert 4 (Senior Legal Advisor = 10 points)</p> <p>Provide CV detailing experience and certified copies of qualifications of all key experts required.</p>	50
<b>TOTAL</b>		<b>100</b>
<b>Minimum functionality to be deemed responsive</b>		<b>80</b>

**Note: A bidder/s that scores less than 80 points out of 100 in respect of functionality will be regarded as submitting a non-responsive bid and will be disqualified.**

## COMPANY PROFILE

Bidders are required to submit a Company Profile that records evidence of previous work which substantiate their ability to undertake specific tasks.

The Company Profile must include the following items:

- Company Registration Documents
- Latest Financial Statements
- VAT Registration Certificate
- Proof of Experience in the Industry
- Proof of Locality of Registered Offices
- Letter of Good Standing (COIDA) and proof of good standing with the Unemployment Insurance Fund (UIF) – if applicable
- Quality Management Plan (if any)

Please note that all copies of qualifications must be certified. Copies of certified documents will not be accepted.

**Attach Company Profile to this page.**

SIGNATURE		NAME (PRINT)	
CAPACITY		DATE	
NAME OF FIRM			

## CENTRAL SUPPLIER DATABASE REGISTRATION

<b>Name of Tenderer</b>	
<b>Supplier Number</b>	

**No awards will be made to a tenderer who is not registered on the Central Supplier Database (CSD).**

The establishment of a Central Supplier Database (CSD) will result in one single database to serve as the source of all supplier information for all spheres of government. The purpose of centralizing government's supplier database is to reduce duplication of effort and cost for both supplier and government while enabling electronic procurement processes.

Registration on the Central Supplier Database must be done online via the website:

<https://secure.csd.gov.za/>

<b>SIGNATURE</b>		<b>NAME (PRINT)</b>	
<b>CAPACITY</b>		<b>DATE</b>	
<b>NAME OF FIRM</b>			



## TERMS OF REFERENCE

### **REQUEST FOR PROPOSALS – APPOINTMENT OF A PANEL OF TRANSACTION ADVISORY SERVICES FOR LEJWELEPUTSWA DISTRICT MUNICIPALITY FOR A PERIOD OF 3 YEARS AT A RISK BASIS.**

#### **1. INTRODUCTION**

Lejweleputswa District Municipality is a category C municipality and shares a boundary with North West province to its north-west, Fezile Dabi and Thabo Mofutsanyana District Municipalities to its east, Mangaung Metropolitan and Xhariep District Municipalities to its south, and the Northern Cape Province to its west.

The Lejweleputswa District Municipality (DC 18) is located in the north-western part of the Free State province and is about 32 287 km<sup>2</sup>. The district was formed in the year 2000 and is one of the 4 District Municipalities and the Metropolitan in the province. Lejweleputswa District makes up almost a third of the province, and consists of the following five local municipalities, namely Masilonyana, Tokologo, Tswelopele, Matjhabeng and Nala.

#### **2. BACKGROUND**

Lejweleputswa District Municipality has limited powers and functions and balance sheet. In order for the district municipality to ensure financial sustainability and continue to deliver on its core mandate and achieve its developmental goals, the district municipality needs to explore different funding opportunities enhancing service delivery through improved project finance and infrastructure investment management capabilities and the analysis of overall project finance strategies.

The challenge of small-scale rural municipalities is characterized by insufficient funding which seriously undermines and hampers local economic development and service delivery. Across the country, small-scale rural municipalities are dependent almost entirely on grants from National Treasury, other national departments and provincial departments. In general terms, these municipalities are unable to develop their respective local economies into resilient and dynamic economic nodes.

It is against the above background that Lejweleputswa District Municipality hereby invites bidders to bid for the appointment of transactional advisors (consultants) to plan and raise capital for the implementation of key infrastructure and economic development projects within Lejweleputswa District Municipality for a period of thirty-six (36) months on a risk basis.

The capital raised should be in the form of loan finance, grants, investment and foreign direct investment. This fund is intended for Basic Infrastructure Development in accordance with the Powers and Functions of the District municipality as stipulated in section 84 of the Municipal Structures Act (energy management, water and sanitation services and road infrastructure management), Operations of Mines, Establishment of key Agri-business Projects (Abattoir, Milling Plant, Fresh Produce Market), Property Development (warehousing, commercial and residential), ICT (Document Management System, Shared Services Model, Business Connect, ICT digital hubs, Municipal Health Information Management System and Financial Management System etc.) Solar Plant (far, Waste Management and Recycling Plant, Tannery, Small Scale Mining, Mine Mitigation and rehabilitation programme Herbs and Medicinal Plants, Environment-Related Projects, Urban Renewal Environment Project, Eco-Town Facilitation, Eco-Tourism, Greening and Waste Minimization, Youth Jobs in Waste, Revenue Enhancement Programmes, Call Centre Activation, Human Capital, SMME and Cooperatives Training (Development), climate change and air quality management and any other projects that can

change the Economic Landscape of the Region of Lejweleputswa. For more information or clarity on the projects please do not hesitate to contact the office of the MM.

### **3. PROBLEM STATEMENT**

The unemployment rate within the district is increasing at a higher rate above current fiscal injections, it is currently standing at 48% as at 2018. Therefore, there is a need to fundraise in order to stimulate local economic growth and create jobs for sustainable livelihoods:

- I. **Strategy-Implementation Alignment**
  - a. The long-term vision requires refinement and key projects and budgets need to be better aligned with the vision
  - b. Various projects are implemented in a fragmented manner and require better packaging
  - c. A more decisive strategic and spatial organization framework is needed
- II. **Organizational Flow**
  - a. Better organizational alignment is required towards strategic implementation and impact- oriented performance
  - b. A strategic filter is necessary at the highest management level for credible project conceptualization, packaging and execution
- III. **Investment Mobilization**
  - a. Current levels of urgency and funding are insufficient to achieve the 2030 vision
  - b. Better plugging in of private sector and investment community into the Municipality's vision and projects is required
  - c. A more business-friendly environment and smarter public-private investment is necessary

### **4. OBJECTIVES**

- I. **Improve Alignment between Strategy and Implementation**
  - a. Improve and fast-track project implementation
  - b. Enable better long-term decision making and resource prioritization
  - c. Refine the long-term vision and align key projects and budgets with the vision
  - d. Overcome fragmented project conceptualization and delivery
  - e. Package and prepare projects better
  - f. Establish a more decisive strategic and spatial organizational framework
- II. **Strengthen Organizational Flow**
  - a. Strengthen the strategic leadership and management processes in Lejweleputswa District Municipality
  - b. Improve organizational alignment towards strategic implementation and impact-oriented performance
  - c. Arrange a strategic filtering of projects at the highest management level for credible project conceptualization, packaging and execution
  - d. Strengthen delivery accountability and monitoring according to a long-term strategic project framework
- III. **Mobilize Investment**
  - a. Raise levels of funding to achieve the 2030 vision

- b. Plug-in private sector and investment community into the Municipality's vision and projects
- c. Set up a more business-friendly environment with smarter public-private investment
- d. Improve public-private sector collaboration

## 5. SCOPE OF WORK & DELIVERABLES

- Sourcing of funds and implementation of projects and or programmes for funds sourced
- Assess, review and align the long-term vision, IDP, DDM, SEZ, PPP, BOT, BOOT, SDF and currently identified projects
- Develop a strategic spatial investment framework
- Develop project concept documents
- Prepare and package bankable feasible projects
- Solicit investment and funding
- Strategic facilitation of private sector involvement
- Prepare Expression of Interest documents for implementation of projects
- Establish evaluation criteria, evaluate proposals and advise on selection
- Support contracting and implementation
- Monitor progress and report
- In general, provide:
  - Strategic and technical advice and support to the office of the MM
  - Support decision making processes
  - Draft submissions, reports and prepare presentations
  - Prepare and facilitate working sessions, investment forums, etc.
  - Develop and manage strong professional working relations within the Municipality and with stakeholders
  - Prepare a project charter, plan and programme and regular reporting against objectives
  - Assist in the Procurement, adjudication and appointment of the necessary Implementing Consultants or Contractors, **where needed and necessary**.

## 6. SPECIFIC APPLICABLE TERMS

The following amongst other terms to be negotiated shall apply:

- Any firms so appointed shall at all times be required to comply with all Municipal terms and conditions as applicable from time to time.
- Fees and disbursements shall be paid only for work done and billed on the applicable tariff or percentage sharing to be negotiated with firms. The bidders are expected to comply with the applicable professional fees structure issued by Department of Public Services and administration for professional service providers e.g. ECSA, SAICA, IRBA, CESA, CFA, SAVCA, SAIPA, SETA accreditations, registered tax practitioner and any other related professional bodies in terms of the proposal.
- The appointment will be for a period of thirty-six (36) months from the date of appointment.

- The successful bidder will be expected to enter into a Service Level Agreement AND Memorandum of Understanding with the Municipality. The signing of the service level agreement by both the successful bidder and Municipality is a condition for the appointment to be valid and effective.

## **7. PERIOD**

The T/A (consultant) will be contracted for a period of thirty-six (36) months which may be extended due to the nature of projects and funding models available in the financial market.

## **8. METHODOLOGY AND INSTITUTIONAL ARRANGEMENTS**

- The methodology and work plan must be set up in such a way that it facilitates a common understanding within the Municipality and across all key stakeholders of the opportunities and impediments to growth and development.
- The method of remuneration will be based on the scope of works and requirements of each project.
- An overall service level agreement will be negotiated and agreed between service provider and LDM once a bidder is appointed.
- On project level engagement LDM will issue a transactional advisory request to the service providers.
- The service provider will submit the costing of the implementation plan and timelines for the project.
- Upon approval of the above by LDM, a service level agreement will be drawn on each project.
- It must further mobilize all these actors towards successful participation and achievement of goals, and it must enable rigorous project stage and cycle management. The Institutional set up and arrangements need to be specified and motivated.

## **9. REPORTING**

The T/A (consultant) should be accountable and managed from the Office of the MM. The T/A (consultant) will also have a dotted line alignment and engagement with various other departments affected by the various programmes and projects