



Transport Education Training Authority

Driven by Vision

COMPLIANCE CHECKLIST OF RETURNABLE DOCUMENTS BY THE BIDDER

SCHEDULE 21 – COMPLIANCE CHECKLIST OF RETURNABLE DOCUMENTS

MANDATORY REQUIREMENTS – STAGE 1 EVALUATION

Bidders who fail to meet and of the following mandatory requirements will be disqualified at Pre-Compliance Phase:

NB. Tick with “X” if you comply / not comply / Not Applicable

Criterion	Requirement	Comply	Not Comply	Not Applicable
Invitation to bid (SBD 1)	<ul style="list-style-type: none"> The form must be completed and signed electronically or in black ink. 			
Bid submission	<ul style="list-style-type: none"> Bid documents must be completed in full and all declarations of interest must be signed. For JV or consortium all declarations must be signed by all parties. Only one (1) original copy must be submitted, signed by an authorised representative (s). This is a Two-Envelope System for the Research Proposal / Technical Proposal and Pricing Proposal. The Research Proposal / Technical Proposal MUST be submitted separately from the Price Proposal Schedule and SBD 3.3. form. Price Proposal and SBD 3.3 form must be submitted in separate clearly marked sealed envelope. This envelope must be clearly marked with the bidder’s name and tender description. 			

Criterion	Requirement	Comply	Not Comply	Not Applicable
	<ul style="list-style-type: none"> A second copy of the Research Proposal / Technical Proposal MUST be submitted per a virus free USB and MUST not include the Pricing Proposal and information relating to Pricing. 			
Pricing / Costing Schedule	<ul style="list-style-type: none"> Submit the Pricing/Costing Schedule in separate sealed envelope clearly marked with bidder's name, tender description, and tender number The bidder must fully complete and sign the SBD 3.3 form electronically or in black ink. Failure to submit Pricing Envelope separately will disqualify the bid. 			
Declaration of Interest (SBD 4)	<ul style="list-style-type: none"> The bidder must fully complete and sign the Declaration of interest form electronically or in black ink. For JV or consortium both parties must complete and sign this declaration, per company. 			
SARS Pin / CSD Supplier Number	<ul style="list-style-type: none"> The bidder must submit a SARS Pin with expiry date to assist with verification of Tax Affairs. If a SARS Pin is not submitted provide CSD Supplier Number. In a case of a JV, all companies' Tax Clearance Certificates or SARS pins must be submitted 			
Proposal submission	<ul style="list-style-type: none"> This is a Two-Envelope System for the Technical Proposal and Pricing Proposal. 			
Briefing Session	<ul style="list-style-type: none"> A compulsory briefing session will be scheduled through a video conferencing facility. Details will be shared accordingly. NB. Service providers who fail to attend the compulsory briefing session will be disqualified from the bidding process. 			
Central Supplier Database <u>Registration</u>	<ul style="list-style-type: none"> The bidder must be registered as a supplier with Treasury on www.csd.gov.za. (Please attach proof) 			

NB: All bidders who pass the Pre-Compliance Evaluation will be further evaluated on DNN according to the criteria below:

DEFINITELY NON-NEGOTIABLE REQUIREMENTS (STAGE 2 EVALUATION)

All bidders who pass the Mandatory Requirements will be evaluated on the following DNN Requirements and a bidder who fails to meet any of these requirements will be disqualified from further evaluation of Quality:

Criterion	Requirement	Comply	Not Comply	Not Applicable
Professional Association and Certification	<ul style="list-style-type: none">Provide proof of a valid certificate of registration and affiliation with the relevant regulatory and professional body:<ul style="list-style-type: none">- Financial Sector Conduct Authority (FSCA) for the bidder, Accounts Manager, and the service personnel.			
Bidders Experience	<ul style="list-style-type: none">The bidder must possess a minimum of five (5) years' experience in providing insurance services for property and assets. <p>NB. COMPULSORY: Complete Experience Schedule attached.</p>			
Minimum Number of References	<ul style="list-style-type: none">The bidder must submit a minimum of three (3) references reflected in the Experience Schedule <p>NB. Provide a minimum of three (3) signed references from previously serviced clients not older than five (5) years</p>			
Accounts Manager Experience	<ul style="list-style-type: none">The Accounts Manager must have a minimum of five (5) years in managing and leading a category 1, subcategory 6 products and stakeholder management. <p>NB. COMPULSORY: Complete Experience Schedule attached, linked to the details on the CV.</p>			

NB: All bidders who pass the Pre-Compliance Evaluation will be further evaluated on Quality Evaluation.