

PART A (SBD 1)
INVITATION TO BID INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	E19/2022/2023	CLOSING DATE:	13 JANUARY 2023	CLOSING TIME:	11:00
DESCRIPTION:	TRAINING OF EARLY EDUCATION DEVELOPMENT (EED) OFFICIALS, BOARD MEMBERS AND MATRONS ON ECD CENTRE MANAGEMENT AND ADMINISTRATION BASED ON THE NON-PROFIT ORGANISATION ACT, 1997 (ACT NO 71 OF 1997)				
PERIOD:	THREE YEARS FROM DATE OF APPROVAL				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BID DOCUMENTS MAY BE COURIER TO OR DEPOSITED IN THE BID BOX SITUATED AT: N8 Gateway Office Park Plot 22 C/O Rudolf Greyling & AW Louw Avenue Estoire, BLOEMFONTEIN, 9301 THE BID BOX IS ON THE OUTSIDE AND LEFT FROM THE DOORS AT ENTRANCE 3					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	MS K RAMPAI		CONTACT PERSON	MR. LT TLADI	
TELEPHONE NUMBER	051-4041873		TELEPHONE NUMBER	0660159086/051-4044321	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	K.Rampai@fseducation.gov.za		E-MAIL ADDRESS	LT.Tladi@fseducation.gov.za	
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					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		AND	CENTRAL SUPPLIER DATABASE No:	MAAA.....
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT <input type="checkbox"/> Yes <input type="checkbox"/> No		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> 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]					
1. ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		2. ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3]	
[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]					
*BBBE CERTIFICATE MUST BE VALID AT TIME WHEN BID CLOSE. Please note that there are two types of sworn affidavits namely these for: 1) EME suppliers (where the total annual revenue for the latest financial year was R10 million or less) AND 2) QSE suppliers (where the total annual revenue for the latest financial year is between R10 million and R50 million) Please ensure that you complete and submit the correct sworn affidavit according to your total annual revenue. The department will not take responsibility if information was wrongly declared. See paragraph 20 of the Standard Conditions for consequences on false information.					
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A BRANCH IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> 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 BELOW	

PART B (SBD 1) 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 IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
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 VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7	NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....

.....

.....

STANDARD BID CONDITIONS

1. PRICES SBD 3.1/ PRICING SCHEDULE

- 1.1 Bid prices **must** be all inclusive and no additional and hidden cost will be paid for e.g. delivery, VAT, etc.
- 1.2 Grand total of bid price must be indicated on the relevant **SBD 3.1 form** unless otherwise requested by the Department.
- 1.3 The pricing schedule **must** be completed in pen ink. **Failure to do so will invalidate your offer.**
- 1.4 Grand total price indicated on the SBD 3.1 form must correspond with the total price indicated on the pricing schedule.
- 1.5 Service provider must ensure correct calculations as the department will not take responsibility for incorrect prices.

2. COMPLETION AND SUBMITTING OF BID DOCUMENT

A. STANDARD BID DOCUMENTATION FORMS (SBD) TO BE COMPLETED AND SIGNED

- 2.1 **SBD 1:**
The **SBD 1** (Bid Invitation Form) to be completed in full and signed.
- 2.2 **SBD 4:**
The declaration of interest form (SBD 4) to be completed at all times (if applicable or not) and signed by the bidder. The service providers must declare any relationship with any person employed by the Department as contemplated in the National Treasury Practice Note no 7 of 2009/2010 (SCM – Declaration of Interest). Failure to complete and sign the SBD 4 may disqualify your offer.
- 2.3 **SBD 5:**
The National Industrial Participation Programme (SBD 5) should be completed in cases where it is applicable.
- 2.4 **SBD 6.1:**
The Preference Point Claim form in terms of the Preferential Procurement Regulations 2017: Should be completed and signed by service provider if points are claimed.
- 2.5 **SBD 6.2:**
The Declaration certificate for Local Production and content for designated sectors should be completed and signed if the content of this bid fall in the designated group of local production as identified by National Treasury.

B. CORRECTION FLUID AND CORRECTIONS TO SBD FORMS

- 2.6 Correction fluid (e.g. Tippex) must not be used in bid documents in order to correct mistakes. **Uses of correction fluid (tippex) in the bid document and on the prices are** not acceptable and will invalidate your bid.
- 2.7 Where a bidder wishes to correct a mistake, a single line must be drawn through it and the bidder must place his/her signature and date next to the correction, so that the original entry is still visible and legible.
- 2.8 In the case of alterations/corrections a full signature must be attached above, next to or below the said alteration or correction

C. BID FORMS

- 2.9 The bid forms should not be retyped or redrafted.
- 2.10 Only the bid documents issued by the Department of Education Free State must be used.
- 2.11 Bid documents to be completed in full.
- 2.12 Bidders shall check the numbers of the pages and satisfy themselves that none are missing, duplicated or misprinted. No liability shall be accepted in regard to claims arising from the fact that pages are missing, duplicated or misprinted.

D. SUBMITTING OF BID DOCUMENTATION

- 2.13 Unless specifically provided for in the bid document, no bid transmitted by telegram, telex, facsimile or similar apparatus shall be considered.
- 2.14 The bid must be submitted in a **sealed envelope** before the closing date and time and deposited in the bid-box at:

**Department of Education
Acquisition Management Sub-Directorate
N8 Gateway Office Park
Plot 22
C/O Rudolf Greyling & AW Louw Avenue
Estoire
BLOEMFONTEIN
9301**

THE BID BOX IS ON THE OUTSIDE AND LEFT FROM THE DOORS IN ENTRANCE 3

The bid number and closing date must be clearly indicated on the sealed envelope.

- 2.15 Bidders must ensure that bids are delivered timeously to the correct address.
- 2.16 Companies must ensure that their bid documentation is thoroughly binded. The Department cannot be held responsible for missing pages if your document is not binded.
- 2.17 Bid documents can be **downloaded** from the National Treasury eTender Publication Portal free of charge at the following address:

<http://www.etenders.gov.za>

(Click then on *Opportunities* and choose *Currently Advertised*) -

OR

<http://www.education.fs.gov.za>

(Click on Budget & Procurement and choose bids and then bid documents.)

2.18 LATE BIDS

Bids received after the closing date and time, at the address indicated in the bid document, will not be accepted for consideration and where practicable, be returned unopened to the bidder.

3. FORMS TO CLAIM POINTS FOR B-BBEE (SBD 6.1 FORM)

- 3.1 Where points are claimed for B-BBEE Status Level of Contribution the SBD 6.1 form, to be completed in full and signed by the bidder. A **VALID AND ORIGINAL/ORIGINAL CERTIFIED BBBEE** Status Level Verification Certificate should be attached.
- 3.2 BBBEE Status Level Verification Certificates should be issued by the agencies as stipulated in Par 6.4 of the Standard Conditions.
- 3.3 A **trust, consortium or joint venture** will qualify for points for their B-BBEE status level as an Unincorporated entity, provided that the entity submits their **consolidated B-BBEE status level certificate** as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

4. A NON-COMPULSORY BRIEFING SESSION WILL BE CONDUCTED

Details:

TOWN	VENUE	DATE	TIME
Bloemfontein	Conference Room 1 (Entrance 1) N8 Gateway Office Park C/O Rudolf Greyling & AW Louw Avenue BLOEMFONTEIN	12/12/2022	11:00

5. EVALUATION CRITERIA

5.1 STAGE 1 OF EVALUATION: PRE-QUALIFYING CRITERIA FOR PREFERENTIAL PROCUREMENT

B-BBEE STATUS LEVEL CONTRIBUTION (LEVEL 1-3)

(PRE-EVALUATION CRITERIA FOR PREFERENTIAL PROCUREMENT DEFINED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017: Regulation 4(1)(a))

Only bidders with BBBEE status level of Contribution 1-3 will qualify.

- Bidders are required to submit proof of B-BBEE status level of contributor. Proof includes a valid B-BBEE status level verification certificate or a valid sworn affidavit signed by the EME/QSE representative and attested by Commissioner of oaths.
- A trust, consortium or joint venture must submit a consolidated B-BBEE status level verification certificate.
- A bidder who fails to meet the pre-qualifying criteria stipulated above is an acceptable bid and will be disqualified and not evaluated further.

5.2 STAGE 2 OF EVALUATION: SPECIAL CONDITIONS

- **Proof of accreditation to provide training for module 2 and 3 should be submitted.**

5.3 STAGE 3 OF EVALUATION: FUNCTIONALITY CRITERIA

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



STAGE 3 OF EVALUATION: FUNCTIONALITY CRITERIA

EVALUATION / ADJUDICATION CRITERIA: E19/2022/2023

1. The bid will be evaluated as follows:
 - 1.1 Assessment on Functionality (**Separate from price**): **50** points
 - 1.2 Assessment on price: **80** points
 - 1.3 B-BBEE grading: **20** points
2. The value of this bid is estimated to be less than R50 000 000 and therefore the **80/20** system shall be applicable.

3. PRE-QUALIFICATION REQUIREMENTS/FUNCTIONALITY CRITERIA

All bids will be subject to **Pre-Qualification** and will be required to achieve a minimum of **score minimum of 35 points for functionality** in total to be further evaluated for price.

NB: Bidders who score below *35 Points out of 50 Points* in the assessment of functionality will not be considered.

FUNCTIONAL CATEGORY	MAXIMUM POINTS	MAXIMUM ALLOCATED POINTS/	DOCUMENTARY PROOF IN ORDER TO CLAIM POINTS	COMMENTS/CHECKLIST					
CAPABILITY AND CAPACITY IN SIMILAR TRAINING AND MANAGEMENT SERVICES	Total = 15 Points								
	<u>Signed Appointment letter/purchase order/proof of contractual agreement (Maximum 7 points)</u>		<u>ANNEXURE A 1</u> Signed Appointment letter/proof of contractual agreement/purchase order in the name of the bidder for similar training and management services	<u>APPOINTMENT LETTER/PURCHASE ORDER attached?</u> <table><tr><td>YES</td><td></td><td>NO</td><td></td></tr></table>	YES		NO		
	YES		NO						
1 Letter which stipulate a value of delivery from at least R500 000.00 up to	➔ 1 point	The appointment letter/purchase order should: <ul style="list-style-type: none">• Be signed• Be on the letterhead of the department/company and in case of purchase order the department should be reflected	<u>IS FOLLOWING INDICATED?</u> <table><tr><td>Signed?</td><td>YES</td><td>NO</td></tr><tr><td>On letter head/indication of department/company ordered</td><td>YES</td><td>NO</td></tr></table>	Signed?	YES	NO	On letter head/indication of department/company ordered	YES	NO
Signed?	YES	NO							
On letter head/indication of department/company ordered	YES	NO							

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



education

Department of
Education
FREE STATE PROVINCE

FUNCTIONAL CATEGORY	MAXIMUM POINTS	MAXIMUM ALLOCATED POINTS/	DOCUMENTARY PROOF IN ORDER TO CLAIM POINTS	COMMENTS/CHECKLIST																																											
	<p>R1 Million</p> <p>1 Letter which stipulate a value of delivery above R1 Million to R 2 Million ➔3 points</p> <p>1 Letter which stipulate a value of delivery above R2 Million to R 3 million ➔5 points</p> <p>1 Letter which stipulate a value of delivery of more than R 3 million ➔7 points</p> <p>AND</p> <p>Signed reference letter which stipulate a minimum value of (Maximum 8 points):</p> <p>1 Letter which 1 Letter which stipulate a value of delivery from at least R500 000.00 up to R1 Million ➔1 point</p> <p>1 Letter which stipulate a value of delivery above R1 Million to R 2 Million ➔3 points</p> <p>1 Letter which stipulate a value of delivery above R2 Million to R 3 million ➔5 points</p> <p>1 Letter which stipulate a value of delivery of more than R 3 million ➔8 points</p>		<ul style="list-style-type: none">Should indicate the description/detailsHave contact details <p>The following should reflects on the required documentation</p> <ul style="list-style-type: none">Date of appointment/date of order should be indicatedValue of contract/orderContactable reference <p>ANNEXURE A 2</p> <p>Signed reference letter from referees (corresponded with the appointment letter) for similar training and management services</p> <p>The letter must comply with all the under-mentioned criteria for points to be allocated:</p> <ul style="list-style-type: none">✓ Date of letter should not be older than 5 years✓ Letter should be on official letterhead of institution to whom services were rendered/project was carried out.✓ Quality of service must be stipulated.✓ Value of service must be stipulated <p>The reference letter should be addressed to the company that bid.</p>	<table><tr><td>Description and quantity of goods delivered/service rendered?</td><td><u>YES</u></td><td><u>NO</u></td></tr><tr><td>Contact details</td><td><u>YES</u></td><td><u>NO</u></td></tr><tr><td>Date indicated</td><td><u>YES</u></td><td><u>NO</u></td></tr><tr><td>Value of contract</td><td><u>YES</u></td><td><u>NO</u></td></tr><tr><td>R _____</td><td></td><td></td></tr><tr><td>Contactable reference</td><td><u>YES</u></td><td><u>NO</u></td></tr><tr><td>POINTS SCORED</td><td colspan="2">_____/7</td></tr></table> <p>REFERENCE LETTER attached?</p> <table><tr><td><u>YES</u></td><td></td><td><u>NO</u></td><td></td></tr></table> <table><tr><td></td><td><u>YES</u></td><td><u>NO</u></td></tr><tr><td>Does letter correspond with the appointment letters</td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td>DATE OF LETTER NOT older than 5 years</td><td></td><td></td></tr><tr><td><u>Indicate date:</u></td><td><u>Indicate value</u></td><td></td></tr><tr><td>Date of letter: _____</td><td>R</td><td></td></tr></table>	Description and quantity of goods delivered/service rendered?	<u>YES</u>	<u>NO</u>	Contact details	<u>YES</u>	<u>NO</u>	Date indicated	<u>YES</u>	<u>NO</u>	Value of contract	<u>YES</u>	<u>NO</u>	R _____			Contactable reference	<u>YES</u>	<u>NO</u>	POINTS SCORED	_____/7		<u>YES</u>		<u>NO</u>			<u>YES</u>	<u>NO</u>	Does letter correspond with the appointment letters						DATE OF LETTER NOT older than 5 years			<u>Indicate date:</u>	<u>Indicate value</u>		Date of letter: _____	R	
Description and quantity of goods delivered/service rendered?	<u>YES</u>	<u>NO</u>																																													
Contact details	<u>YES</u>	<u>NO</u>																																													
Date indicated	<u>YES</u>	<u>NO</u>																																													
Value of contract	<u>YES</u>	<u>NO</u>																																													
R _____																																															
Contactable reference	<u>YES</u>	<u>NO</u>																																													
POINTS SCORED	_____/7																																														
<u>YES</u>		<u>NO</u>																																													
	<u>YES</u>	<u>NO</u>																																													
Does letter correspond with the appointment letters																																															
DATE OF LETTER NOT older than 5 years																																															
<u>Indicate date:</u>	<u>Indicate value</u>																																														
Date of letter: _____	R																																														

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



education

Department of
Education
FREE STATE PROVINCE

FUNCTIONAL CATEGORY	MAXIMUM POINTS	MAXIMUM ALLOCATED POINTS/	DOCUMENTARY PROOF IN ORDER TO CLAIM POINTS	COMMENTS/CHECKLIST																							
				<table border="1"> <tr> <td>On OFFICIAL LETTERHEAD of institution to whom services were rendered? Indicate client:</td><td></td><td></td><td></td></tr> <tr> <td>QUALITY Indicated?</td><td></td><td></td><td></td></tr> <tr> <td>Description:</td><td></td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td></td><td>/8</td><td></td></tr> <tr> <td colspan="3">TOTAL POINTS SCORED</td><td>/15</td></tr> </table>	On OFFICIAL LETTERHEAD of institution to whom services were rendered? Indicate client:				QUALITY Indicated?				Description:				POINTS SCORED		/8		TOTAL POINTS SCORED			/15			
On OFFICIAL LETTERHEAD of institution to whom services were rendered? Indicate client:																											
QUALITY Indicated?																											
Description:																											
POINTS SCORED		/8																									
TOTAL POINTS SCORED			/15																								
Structured organogram	→5 points																										
		Structure = 2 Roles and Responsibilities = 3	ANNEXURE B 1) Structured Organogram/reporting structure indicating the: ✓ Proposed Team structure (posts) with reporting lines (2 points) ✓ Role and responsibilities of the team to undertake work to provide effective, efficient and quality service as well as CV's of team (3 points)	STRUCTURED ORGANOGRAM attached? <table border="1"> <tr> <td>YES</td><td></td><td></td><td>NO</td><td></td></tr> </table> <table border="1"> <tr> <td>IS FOLLOWING INDICATED ON ORGANOGRAM?</td><td>YES</td><td>NO</td></tr> <tr> <td>Team structure (posts) with reporting lines (2 points)</td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td></td><td>/2</td></tr> <tr> <td>Role and responsibilities of the team to undertake work to provide effective, efficient and quality service as well as CV's of the team (3 points)</td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td></td><td>/3</td></tr> <tr> <td colspan="2">TOTAL POINTS SCORED</td><td>/5</td></tr> </table>	YES			NO		IS FOLLOWING INDICATED ON ORGANOGRAM?	YES	NO	Team structure (posts) with reporting lines (2 points)			POINTS SCORED		/2	Role and responsibilities of the team to undertake work to provide effective, efficient and quality service as well as CV's of the team (3 points)			POINTS SCORED		/3	TOTAL POINTS SCORED		/5
YES			NO																								
IS FOLLOWING INDICATED ON ORGANOGRAM?	YES	NO																									
Team structure (posts) with reporting lines (2 points)																											
POINTS SCORED		/2																									
Role and responsibilities of the team to undertake work to provide effective, efficient and quality service as well as CV's of the team (3 points)																											
POINTS SCORED		/3																									
TOTAL POINTS SCORED		/5																									

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents

FUNCTIONAL CATEGORY	MAXIMUM POINTS	MAXIMUM ALLOCATED POINTS/	DOCUMENTARY PROOF IN ORDER TO CLAIM POINTS	COMMENTS/CHECKLIST																																		
Detailed delivery strategy/ training plan	→20 points		<div><div><div>ANNEXURE C</div><div>1) Detailed delivery Strategy / methodology/training plan that clearly demonstrates every aspect on how the training will be conducted: <u>ANNEXURE C1</u> ✓ Training program with realistic time frames. (2 points) ✓ Detailed activities/deliverables (3 points) ✓ How the project will be managed (approached on training and how the service provider will ensure uninterrupted service and timely delivery (2 points)</div><div><u>ANNEXURE C2</u> ✓ How support will be given to students (matrons / board members / social workers / subject advisors) (2 points)</div><div><u>ANNEXURE C3</u> ✓ Demonstrate how the (matrons / board members / social workers / subject advisors) will be evaluated/moderated continuously leading to completion of Portfolio of Evidence for attainment of Certificate of Competency. (2 points) ✓ Demonstrate how the assessment of students (matrons / board members / social workers /</div></div><div><div>Annexure C1 = 7</div><div>Annexure C2 = 2</div><div>Annexure C3 = 4</div></div></div> <div><div>DETAILED DELIVERY STRATEGY attached?</div><table><tr><td>YES</td><td></td><td></td><td>NO</td><td></td></tr></table><table><tr><td>IS FOLLOWING INDICATED ON DELIVERY STRATEGY?</td><td>YES</td><td>NO</td></tr><tr><td>Realistic time frames (2 points)</td><td></td><td></td></tr><tr><td>Detailed activities/deliverables (3 points)</td><td></td><td></td></tr><tr><td>POINTS SCORED</td><td colspan="2">___/5</td></tr><tr><td>How the project will be managed and how the service provider will ensure uninterrupted service and timely delivery (2 points)</td><td></td><td></td></tr><tr><td>POINTS SCORED</td><td colspan="2">___/2</td></tr><tr><td>How support will be given to students (2 points)</td><td></td><td></td></tr><tr><td>POINTS SCORED</td><td colspan="2">___/2</td></tr><tr><td>Demonstrate how the (teachers/subject advisors/provincial coordinators) will be evaluated/moderated continuously leading to completion of Portfolio of Evidence for attainment of Certificate of Competency. (2 points)</td><td></td><td></td></tr><tr><td>Demonstrate how the assessment of students will be evaluated/moderated (pre and post-</td><td></td><td></td></tr></table></div>	YES			NO		IS FOLLOWING INDICATED ON DELIVERY STRATEGY?	YES	NO	Realistic time frames (2 points)			Detailed activities/deliverables (3 points)			POINTS SCORED	___/5		How the project will be managed and how the service provider will ensure uninterrupted service and timely delivery (2 points)			POINTS SCORED	___/2		How support will be given to students (2 points)			POINTS SCORED	___/2		Demonstrate how the (teachers/subject advisors/provincial coordinators) will be evaluated/moderated continuously leading to completion of Portfolio of Evidence for attainment of Certificate of Competency. (2 points)			Demonstrate how the assessment of students will be evaluated/moderated (pre and post-		
YES			NO																																			
IS FOLLOWING INDICATED ON DELIVERY STRATEGY?	YES	NO																																				
Realistic time frames (2 points)																																						
Detailed activities/deliverables (3 points)																																						
POINTS SCORED	___/5																																					
How the project will be managed and how the service provider will ensure uninterrupted service and timely delivery (2 points)																																						
POINTS SCORED	___/2																																					
How support will be given to students (2 points)																																						
POINTS SCORED	___/2																																					
Demonstrate how the (teachers/subject advisors/provincial coordinators) will be evaluated/moderated continuously leading to completion of Portfolio of Evidence for attainment of Certificate of Competency. (2 points)																																						
Demonstrate how the assessment of students will be evaluated/moderated (pre and post-																																						

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



education

Department of
Education
FREE STATE PROVINCE

FUNCTIONAL CATEGORY	MAXIMUM POINTS	MAXIMUM ALLOCATED POINTS/	DOCUMENTARY PROOF IN ORDER TO CLAIM POINTS	COMMENTS/CHECKLIST																								
		Annexure C4 = 4	<p>subject advisors) will be evaluated/moderated. (pre- and post-tests) (2 points)</p> <p>ANNEXURE C4</p> <p>✓ Demonstrate ability to provide training on Generally Accepted Accounting Practices (GRAP) at all 19 venues (4 venues per district except Xhariep 3 venues) (2 Points)</p> <p>✓ Demonstrate ability to provide training on Policy Development at all 19 venues (4 venues per district) (2 points)</p> <p>ANNEXURE C5</p> <p>✓ Demonstrate Orientation and graduation arrangements (3 points)</p>	<table border="1"> <tr> <td>tests) (2 points)</td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td colspan="2">___/4</td></tr> <tr> <td>Demonstrate ability to provide training on Generally Accepted Accounting Practices (GRAP) at all 19 venues (4 venues per district except Xhariep has 3 venues) (2 Points)</td><td></td><td></td></tr> <tr> <td>Demonstrate ability to provide training on Policy Development at all 19 venues (4 venues per district except Xhariep 3 venues) (2 points)</td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td colspan="2">___/4</td></tr> <tr> <td>Demonstrate Orientation and graduation arrangements (3 points)</td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td colspan="2">___/3</td></tr> <tr> <td colspan="3">TOTAL POINTS SCORED ___/20</td></tr> </table>	tests) (2 points)			POINTS SCORED	___/4		Demonstrate ability to provide training on Generally Accepted Accounting Practices (GRAP) at all 19 venues (4 venues per district except Xhariep has 3 venues) (2 Points)			Demonstrate ability to provide training on Policy Development at all 19 venues (4 venues per district except Xhariep 3 venues) (2 points)			POINTS SCORED	___/4		Demonstrate Orientation and graduation arrangements (3 points)			POINTS SCORED	___/3		TOTAL POINTS SCORED ___/20		
tests) (2 points)																												
POINTS SCORED	___/4																											
Demonstrate ability to provide training on Generally Accepted Accounting Practices (GRAP) at all 19 venues (4 venues per district except Xhariep has 3 venues) (2 Points)																												
Demonstrate ability to provide training on Policy Development at all 19 venues (4 venues per district except Xhariep 3 venues) (2 points)																												
POINTS SCORED	___/4																											
Demonstrate Orientation and graduation arrangements (3 points)																												
POINTS SCORED	___/3																											
TOTAL POINTS SCORED ___/20																												
	Total = 5 points																											
PROOF OF SOUND FINANCIAL STABILITY TO DELIVER SERVICE	<p>No Financial Statement</p> <p>Unsigned and Non-certified Audited Financial Statement not prepared by a Qualified Accredited Accountant</p>	<p>→ 0 points</p> <p>→ 0 points</p>	<p>ANNEXURE D</p> <p>ORIGINAL/ORIGINAL CERTIFIED Audited financial statement signed off by a registered Chartered accountant</p> <p>or</p> <p>ORIGINAL/ORIGINAL CERTIFIED Audited Financial statement signed by registered accountant</p> <p><i>(The department reserves the right to verify the authenticity and credibility of the Financial Statement that are submitted with this Bid.)</i></p>	<p>FINANCIAL STATEMENTS attached? CIRCLE YES or NO.</p> <table border="1"> <tr> <td>YES</td><td></td><td></td><td>NO</td><td></td></tr> </table> <p>DOES FINANCIAL STATEMENTS COMPLY WITH THE FOLLOWING?</p>	YES			NO																				
YES			NO																									

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents

FUNCTIONAL CATEGORY	MAXIMUM POINTS	MAXIMUM ALLOCATED POINTS/	DOCUMENTARY PROOF IN ORDER TO CLAIM POINTS	COMMENTS/CHECKLIST																																	
	Signed, sound and ORIGINAL/ORIGINALLY CERTIFIED Audited Financial Statement prepared by a Qualified Accredited Accountant/signed agreement letter from credit provider	→ 5 points	<p>Or</p> <p>ORIGINALLY CERTIFIED Signed Agreement letter from credit provider stipulating the credit amount that can be accessible to your company. The credit provider should be registered with NCR.</p> <p>(The department reserves the right to verify the authenticity and credibility of the letter with any other person in the company.)</p>	<table border="1"> <tr> <td>Financial statement</td><td><u>YES</u></td><td><u>NO</u></td></tr> <tr> <td>Signed?</td><td></td><td></td></tr> <tr> <td>Compiled by CA or accountant?</td><td></td><td></td></tr> <tr> <td>Is it originally certified?</td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td colspan="2"></td></tr> </table> <p>OR</p> <table border="1"> <tr> <td>IS LETTER FROM CREDIT PROVIDER ATTACHED?</td><td><u>YES</u></td><td><u>NO</u></td></tr> <tr> <td>IS IT ORIGINALLY CERTIFIED?</td><td></td><td></td></tr> <tr> <td><u>DOES LETTER COMPLY WITH THE FOLLOWING?</u></td><td><u>YES</u></td><td><u>NO</u></td></tr> <tr> <td>IS CREDIT AMOUNT STIPULATED?</td><td></td><td></td></tr> <tr> <td>POINTS SCORED</td><td colspan="2"></td></tr> </table> <table border="1"> <tr> <td>TOTAL POINTS SCORED</td><td colspan="2"><u> </u> /5</td></tr> </table>	Financial statement	<u>YES</u>	<u>NO</u>	Signed?			Compiled by CA or accountant?			Is it originally certified?			POINTS SCORED			IS LETTER FROM CREDIT PROVIDER ATTACHED?	<u>YES</u>	<u>NO</u>	IS IT ORIGINALLY CERTIFIED?			<u>DOES LETTER COMPLY WITH THE FOLLOWING?</u>	<u>YES</u>	<u>NO</u>	IS CREDIT AMOUNT STIPULATED?			POINTS SCORED			TOTAL POINTS SCORED	<u> </u> /5	
Financial statement	<u>YES</u>	<u>NO</u>																																			
Signed?																																					
Compiled by CA or accountant?																																					
Is it originally certified?																																					
POINTS SCORED																																					
IS LETTER FROM CREDIT PROVIDER ATTACHED?	<u>YES</u>	<u>NO</u>																																			
IS IT ORIGINALLY CERTIFIED?																																					
<u>DOES LETTER COMPLY WITH THE FOLLOWING?</u>	<u>YES</u>	<u>NO</u>																																			
IS CREDIT AMOUNT STIPULATED?																																					
POINTS SCORED																																					
TOTAL POINTS SCORED	<u> </u> /5																																				

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



education

Department of
Education
FREE STATE PROVINCE

FUNCTIONAL CATEGORY	MAXIMUM POINTS	MAXIMUM ALLOCATED POINTS/	DOCUMENTARY PROOF IN ORDER TO CLAIM POINTS	COMMENTS/CHECKLIST																																												
FREESTATE BASED	→ 5 points		<p align="center"><u>ANNEXURE E</u></p> <p><u>Municipal/water/electricity account of the bidder's premises</u></p> <ul style="list-style-type: none"> The account must be in the bidders name/Directors' name/s. The account should not be older than 3 months <p>Or</p> <p><u>ORIGINALLY CERTIFIED Lease agreement:</u> In case of lease agreement originally certified copies of invoices/proof of payment by the tenant for the last three months as proof that the landlord has been paid by the tenant.</p>	<table border="1"> <tr> <td>Proof of Residence (Municipal Bill)</td><td><u>YES</u></td><td><u>NO</u></td></tr> <tr> <td>Is Municipal/water/electricity account attached?</td><td></td><td></td></tr> <tr> <td>Not older than 3 months</td><td></td><td></td></tr> <tr> <td>Indicate date: _____</td><td></td><td></td></tr> <tr> <td>Is it in bidder's name?</td><td></td><td></td></tr> <tr> <td>Town/city in FS: _____ Indicate town _____</td><td></td><td></td></tr> <tr> <td><u>POINTS SCORED</u></td><td></td><td></td></tr> </table> <p align="center"><u>OR</u></p> <table border="1"> <tr> <td>Proof of Residence (Lease Agreement)</td><td><u>YES</u></td><td><u>NO</u></td></tr> <tr> <td>Is Lease agreement attached?</td><td></td><td></td></tr> <tr> <td>Is lease agreement originally certified?</td><td></td><td></td></tr> <tr> <td>Is CERTIFIED copies of invoices/proof of payment by tenant for the <u>last three months</u> attached?</td><td></td><td></td></tr> <tr> <td>Is it in bidder's name?</td><td></td><td></td></tr> <tr> <td>Town/city in FS: _____</td><td></td><td></td></tr> <tr> <td><u>POINTS SCORED</u></td><td></td><td></td></tr> </table> <table border="1"> <tr> <td><u>POINTS SCORED</u></td><td align="right"><u>/5</u></td></tr> </table>	Proof of Residence (Municipal Bill)	<u>YES</u>	<u>NO</u>	Is Municipal/water/electricity account attached?			Not older than 3 months			Indicate date: _____			Is it in bidder's name?			Town/city in FS: _____ Indicate town _____			<u>POINTS SCORED</u>			Proof of Residence (Lease Agreement)	<u>YES</u>	<u>NO</u>	Is Lease agreement attached?			Is lease agreement originally certified?			Is CERTIFIED copies of invoices/proof of payment by tenant for the <u>last three months</u> attached?			Is it in bidder's name?			Town/city in FS: _____			<u>POINTS SCORED</u>			<u>POINTS SCORED</u>	<u>/5</u>
Proof of Residence (Municipal Bill)	<u>YES</u>	<u>NO</u>																																														
Is Municipal/water/electricity account attached?																																																
Not older than 3 months																																																
Indicate date: _____																																																
Is it in bidder's name?																																																
Town/city in FS: _____ Indicate town _____																																																
<u>POINTS SCORED</u>																																																
Proof of Residence (Lease Agreement)	<u>YES</u>	<u>NO</u>																																														
Is Lease agreement attached?																																																
Is lease agreement originally certified?																																																
Is CERTIFIED copies of invoices/proof of payment by tenant for the <u>last three months</u> attached?																																																
Is it in bidder's name?																																																
Town/city in FS: _____																																																
<u>POINTS SCORED</u>																																																
<u>POINTS SCORED</u>	<u>/5</u>																																															
POINTS SCORED GRAND TOTAL			_____/50																																													

5.4 STAGE 4: EVALUATION ON PRICE AND PREFERENCE (80/20 preference point system)

- 5.4.1 Bids will be evaluated in terms of the new Preferential Procurement Regulation, 2017 Regulation 3(a)(ii) "if it is unclear which preference point system will be applicable, 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.

The following formula will be used to calculate the points for price:

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

Where

P_s = Points scored for comparative price of bid under consideration

P_t = Comparative price of bid under consideration

P_{\min} = Comparative price of lowest acceptable bid

- 5.4.2 Points will be allocated to a Bidder for attaining their B-BBEE status level of contributor in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

- 5.4.3 Bidders are required to complete the preference claim form (SBD 6.1), and submit a valid **ORIGINAL/ORIGINAL CERTIFIED BBBEE** verification certificate issued by a verification agency accredited by the South African Accreditation System (SANAS) or a valid sworn affidavit (DTI format) signed by the EME/QSE representative and attested by a commissioner of oath or sworn affidavit issued by DTI.
- 5.4.4 Bidders must ensure that the B-BBEE status level verification certificates submitted are issued by the following agencies:
- Tenderers other than EME/QSEs: Verification agencies accredited by SANAS, or
 - Tenderers who qualify as EME/QSEs: Sworn affidavit signed by the EME/QSE representative and attested by a Commissioner of oaths.
- 5.4.5 Verification agencies accredited by SANAS are identifiable by a SANAS logo and a unique BVA number.
- 5.5 **Certificates issued by IRBA and Accounting Officers have been discontinued and will not be considered.**
- 5.6 Only Bidders who have completed and signed the declaration part of the preference claim form and who have submitted a B-BBEE verification certificate issued by a verification agency accredited by the South African Accreditation System (SANAS) or valid sworn affidavit signed by the EME/QSE representative and attested by a Commissioner of oath will be considered for preference points.

- 5.7 Failure on the part of the Bidder to comply with the above paragraphs will be deemed that preference points for B-BBEE status level of contribution are not claimed and will therefore be allocated a zero (0).
- 5.8 In the event that two or more bids have scored equal total points, the contract will be awarded to the Bidder scoring the highest number of preference points for B-BBEE.
- 5.9 However, when functionality is part of the evaluation process and two or more Bidders have scored equal points including equal preference points for B-BBEE, the contract will be awarded to the Bidder scoring the highest for functionality.
Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.
- 5.10 A contract may, on reasonable and justifiable grounds, be awarded to a bid that did not score the highest number of points.

6. JOINT VENTURE AGREEMENT

- 6.1 Where an entity forms a Joint Venture or a Consortium with another entity and/or other entities, such parties must express in the bid proposal and a **joint venture agreement, witnessed by a registered Attorney at Law must be submitted with the bidding document.**
- 6.2 **Failure to submit a Joint Venture agreement that are signed by all the parties in the Joint Venture** will render the bid non-responsive and your offer will be **disqualified.**
- 6.3 Individual entity/ies must be registered on the CSD and after closing and before awarding, register a Joint Venture or a Consortium on the CSD.
- 6.4 It is expected that a joint venture/consortium should open a joint bank account (proof of the bank account should be submitted after awarding) within 30 days after the awarding of the contract.

7. PAYMENT TO SUPPLIERS

Payments will be handled as prescribed by the PFMA and will normally be effected within 30 days of receipt of all the required documentation, which should be correct in every respect.

8. LEGISLATION / LAWS

Bidders must comply with the provisions of Labour Legislation as well as any other relevant legislation or legal requirement.

9. VALIDITY PERIOD OF BID

The period for which offers are to remain valid and binding (in order for the Department to finalize it), is indicated in the bid documents **(120 DAYS)** and is calculated from the closing time on the understanding that offers are to remain in force and binding until the close of business on the last day of the period calculated and if this day falls on a Saturday, Sunday or public holiday, the bid is to remain valid and binding until the close of business on the following working day.

10. QUANTITIES

Where quantities are specified in the bid documents the Department cannot guarantee that they will be ordered as such, as it depends on Departmental needs and availability of funds. The Department is not liable for any damages the contractor might suffer for not ordering specific quantities.
Where quantities are specified, "as required" the quantities will be ordered as and when needed.

11. SPECIFICATION – BIDDERS RESPONSE

Where a specification provides for the bidders response to the different points of specification, **the form must be properly completed.** Where items deviate from the requirement, the deviation must be indicated.

12. QUALIFICATIONS OF BIDDERS

- 12.1 The Accounting Officer does not bind himself/herself to accept either the offer scoring the highest point or any bid and reserves the right to accept or cancel the bid which he/she deems to be in the best interest of the Department even if it implies a waiver by the Accounting Officer of certain bid requirements which the Accounting Officer considers to be of minor importance and not complied with by a bidder.
- 12.2 The department will disqualify any bid from a bidder whose name appears on the national list of restricted bidders/suppliers/persons.
- 12.3 The department may terminate the contract in whole or in part if the supplier and/or representatives of the department, in the judgement of the department, committed or have engaged in corrupt or fraudulent practices during the bidding process or the execution of that contract that benefited that supplier.
- 12.4 The Department reserves the right to allocate a bid to different service providers to ensure the empowering of as many companies as possible.

13. COMPLIANCE TO CONTRACT

- 13.1 The Department may monitor compliance to the contract after adjudication of the bid that include, but need not be limited to, site inspections and the request for documentary proof of compliance with the PFMA and relevant legislation.
- 13.2 Where services are rendered, which involves minimum wages for employees in terms of the sectoral wage determination, the Department reserves the right to request copies of payslips of employees during the period of the contract.

14. JOB CREATION

- 14.1 The bid aims to meet the needs of the Department, while also contributing to, amongst other, economic development and job creation.
- 14.1.1 Indicate how many additional permanent staff members will be employed as a result of winning the bid:

- 14.1.2 Indicate how many temporary staff members will be employed as a result of winning the bid:

- 14.1.3 Indicate whether the service of Free State Citizens will be utilized:

YES ☐ NO ☐ [TICK APPLICABLE BOX]

15. CENTRAL SUPPLIER DATABASE (COMPULSORY)

Please note that bidders should be registered on the Central Supplier Database.

PLEASE SUBMIT A PRINTOUT REPORT OF YOUR COMPANY'S DETAILS AS REFLECTED ON THE CENTRAL SUPPLIER DATABASE.

16. MAXIMUM DELIVERY PERIOD

As indicated in specification.

17. **PENALTIES**

If detected that a preference had been obtained on a fraudulent basis or any specified goals are not attained in the performance of the contract, an organ of state may:

- Recover all costs, losses or damages resulting from the above-mentioned contract.
- Cancel the contract and claim damages.
- Impose a financial penalty, more severe than the theoretical financial preference associated with the claim which was made.
- Restrict the contractor, its shareholders and directors from obtaining business from any organ of state for a period not exceeding 10 years.

18. **SUCCESSFUL BIDDERS**

- The successful bidder/s will be obliged to sign a contract with the Department.
- Companies that are awarded bids must ensure that the income tax number and VAT number (where applicable) are indicated on the Invoice.

19. **AWARDING CONTRACTS TO GOVERNMENT OFFICIALS IS NOT ALLOWED** **A GOVERNMENT EMPLOYEE MAY NOT HAVE A BUSINESS INTEREST IN ANY ENTITY** **CONDUCTING BUSINESS WITH THE PROVINCIAL GOVERNMENT.**

In accordance with Treasury Instruction Note 17 of 2012, an employee of the Free State Provincial Government or a provincial public entity may not have a business interest in any entity conducting business with the Provincial Government.

According to the Public Service Regulations, 2016, an employee may not do business with any organ of state.

The Provincial Government may not award any tender or enter into any contract with an employee in the employment of the State.

All bids received contrary to Treasury Instruction Note 17 of 2012 and the Public Service Regulations, 2016 (Regulation 13) shall be disqualified.

20. **VALID TAX MATTERS**

It is a condition that the Tax matters of the successful bidder/s are in order.

Submit the following documentation:

Submit a **Centralized Supplier Database (CSD) report** which proof valid and compliant tax matters (in case of Joint Venture a CSD print out report for each party in the JV should be submitted).

21. **SUPPLIER DUE DILIGENCE**

The State reserves the right to conduct supplier due diligence prior to final award or at any time during the contract period and this may include pre-announced/non announced site visits. During the due diligence process the information submitted by the bidder will be verified and any misrepresentation thereof may disqualify the bid in whole or parts thereof.

22. **DECLARATIONS**

A bidder must declare that:

- Information provided is true and correct.
- The signatory to the bid document is duly authorized.
- Documentary proof regarding any bid issue will, when required, be submitted to the satisfaction of the State.

23. THE BIDDER MUST COMPLETE THE FOLLOWING:

This is to certify that the above standard conditions have been read and the bidder undertakes to comply herewith for the full duration of the contract/bid. It is further accepted that any deviation from the bid conditions, requirements and specifications as well as false information provided on any form/document may result in the termination of contract prior to expiry.

I _____ in my capacity as _____ of
_____(Company), hereby certifies that I take note and accept the above-mentioned Standard Conditions, Special Conditions of the Contract and the General Conditions of a Contract. I further declare that the information submitted is correct.

SIGNATURE

Contact person of company: _____

Tel. of company: (____)_____

Fax of company: (____)_____

SPECIFICATION

SPECIFICATIONS ON TRAINING OF ELEMENTARY EDUCATION DEVELOPMENT (EED) OFFICIALS, AND BOARD MEMBERS AND MATRONS ON ECD CENTRE MANAGEMENT AND ADMINISTRATION BASED NPO ACT, 1997 (Act No. 71 of 1997)

1. BACKGROUND

The purpose of this intervention is to assist our Elementary Education Development (EED) officials, and board members and Matrons on ECD Centre management and administration based NPO Act, 1997 (Act No. 71 of 1997). The achievement of this objective resides in our ability to empower officials, board members and matrons to support, manage and administer ECD Centres to be financially viable and administer the finances in line with the intent of the NPO Act, 1997 (Act No. 71 of 1997) and PFMA, 1999 (Act No. 1 of 1999 as amended). This will ensure that children receive quality early education development to prepare them for formal schooling.

Phase 1: 1st Layer of Support (Officials responsible for supporting ECD Sites and Management of Curriculum)

What is our biggest challenge with the support and monitoring of the management, administration, and governance of ECD Sites?

- Our Subject Advisors and Social Workers are not empowered to support and monitor the management and administration of ECD Sites by board members and matrons as per the NPO Act.
- Board members and matrons of ECD Sites have limited skills to:
 - manage and administer ECD Sites as per the requirements of the NPO Act.
 - apply selected GRAP (Generally Recognized Accounting Practices) to periodic accounting reporting process
 - apply accounting principles and procedures in the preparation of reports and decision making
 - manage funds of ECD Sites in line with the prescripts of PFMA.

This training will ensure that officials are able to provide focused support and monitor effective management and administration of ECD Sites.

Phase 2: 2nd Layer of Support (Board Members and Matrons)

What is our biggest challenge with management and administration of ECD Sites?

- AGSA findings of the previous years made reference to the following:
 - some of the ECD Sites not having adequate information and controls to manage their sites in line with the NPO Act and PFMA,
 - non-availability of ECD policies such as, financial management policy (petty cash management), emergency exit policy, admission policy, maintenance policy, labour relations policy, leave management policy, employment contract, conditions of service, and health and safety policy,

- failure to adequately manage the finances of the ECD sites.
- failure to renew ECD site registration certificates (form 12)
- Other areas of concern observed during the on-site support and monitoring of ECD sites reveal that Board members and matrons of ECD Sites have limited skills to:
 - manage and administer ECD Sites as per the requirements of the NPO Act and PFMA.
 - apply selected GRAP (Generally Recognized Accounting Practices) to periodic accounting reporting process
 - apply accounting principles and procedures in the preparation of reports and decision making
 - manage funds of ECD Sites in line with the prescripts of PFMA.
 - ensure that their ECD programmes are registered.
 - govern the affairs of the ECD sites in line with King III report on corporate governance.
 - source sponsorship for ECD sites and not rely entirely on government for funding

The training should provide board members and matrons of ECD sites with necessary skills to manage, administer and govern their Sites in a way that will ensure that children from these Sites will be ready for formal schooling.

2. WHAT DO WE WANT FROM THIS TRAINING?

A training solution to empower officials, ECD board members and matrons from basic level which incorporates all components of ECD management including but not limited to the following;

- administration,
- financial management,
- human resource management, and
- governance.

The training must prepare our officials to support and monitor the effective and efficient management, administration, and governance of ECD Sites. Equip board members and matrons of ECD sites with skills that will help them to effectively manage, administer and govern ECD Sites according to the NPO Act No. 17 of 1997 and Public Finance Management Act, 1990 (Act No. 1 of 1990) (PFMA) while ensuring that children are provided with quality early education development that prepares them for formal schooling.

The training of Early Education Development (EED) officials, and board members and Matrons on ECD Centre management and administration based NPO Act No. 17 of 1997 should be a **one-year** course to

be provided to three cohort of trainees within a period of three years. The one-year course should cover the four modules outlined below:

MODULE 1: BASIC TRAINING ON NPO ACT AS IT RELATES TO ECD SITES

The initial need is to train EED officials, and board members and matrons of ECD Sites on Nonprofit Organisations Act No. 7 of 1997 as it relates to ECD Sites. This initial training should focus on the following aspects:

Session 1: NPO Act and Governance

- Introduction to NPO Act
- Governance (NPO Act)
 - Policies (policies such as, financial management policy (petty cash management), emergency exit policy, admission policy, maintenance policy, labour relations policy, leave management policy, employment contract, conditions of service, and health and safety policy)
- NPO Administration and Management
- Human Resource Management

Session 2: Financial Management

- Introduction to PFMA
- Financial Management (Reporting, Record Keeping, etc.)
- Project Management
- Resource Mobilisation
- Business Plans
- Risk Management

Target groups for module 1 are as follows:

Group 1: Officials (Subject Advisors and Social Workers)

The training sessions should be conducted within a week (5 Days – 40 Notional Hours)

A compulsory one-day registration and orientation session to be conducted prior to the commencement of the formal training.

Group 2: Board members and Matrons of ECD Centres

The training sessions should be conducted within two weeks (10 Days – 80 Notional Hours)

A compulsory one-day registration and orientation session to be conducted prior to the commencement of the formal training.

MODULE 2: APPLY ACCOUNTING PRINCIPLES AND PROCEDURES IN THE PREPARATION OF REPORTS AND DECISION MAKING (SAQA Accredited Unit Standard: 119350)

Session 3:

At the end of this training, EED officials, and ECD Sites' board members and matrons should be able to demonstrate an understanding of accounting principles and reporting requirements and nature of functions in public sector. They will be expected to further demonstrate the following skills of:

- Using accounting techniques and approaches to process financial information
- Applying end of period accounting procedures in the preparation of financial statements
- Applying procedures necessary for control over cash transactions and balances
- Utilising procedures for reporting and recording accounts receivables

- Utilising procedures for recording and reporting on liabilities in the public sector

The course should be offered as per the requirements of SAQA (South African Qualifications Authority) unit standard 119350: Apply accounting principles and procedures in the preparation of reports and decision making at level 5 with 15 credits for full 5 days.

Target groups for module 2 are as follows:

Group 1: Officials (Subject Advisors and Social Workers)

The training sessions should be conducted within a week (3 Days – 24 Notional Hours)

A compulsory one-day registration and orientation session to be conducted prior to the commencement of the formal training.

Group 2: Board members and Matrons of ECD Centres

The training sessions should be conducted within two weeks (8 Days – 64 Notional Hours)

A compulsory one-day registration and orientation session to be conducted prior to the commencement of the formal training.

MODULE 3: APPLY SELECTED GRAP (GENERALLY RECOGNISED ACCOUNTING PRACTICES) TO PERIODIC ACCOUNTING REPORTING PROCESS (SAQA Accredited Unit Standard: 119348, Level: 5, Credits: 12)

Session 4:

At the end of this training, EED officials will be expected to demonstrate the ability of doing the following:

- Defining and applying GRAP in the context of public finance and administration
- Defining a conceptual framework for accounting reporting
- Defining measurement criteria for determining financial position and performance
- Identifying financial reports and identifying and resolving discrepancies

The course should be offered as per the requirements of SAQA (South African Qualifications Authority) unit standard: Apply selected GRAP (Generally Recognised Accounting Practices) to periodic accounting reporting process at level 5 with 12 credits for full 5 days.

Target group for module 3 is as follows:

Group 1: Officials (Subject Advisors and Social Workers)

The training sessions should be conducted within a week (2 Days – 16 Notional Hours)

A compulsory one-day registration and orientation session to be conducted prior to the commencement of the formal training.

MODULE 4: POLICY DEVELOPMENT

Session 4 (6 Sessions)

Appointed service provider will be expected to assist ECD sites to develop the following policies:

- financial management (petty cash management),
- admission and attendance,
- leave management,
- conditions of service, and
- occupational health and safety.

The service provider should conduct two compulsory sessions for first three terms to ascertain progress. In the fourth term, service provider to provide evidence that all ECD sites have the above policies.

Target group for module 4 is as follows:

Group 1: Officials (Subject Advisors and Social Workers)

The training sessions should be conducted within a week (30 Days – 240 Notional Hours)

A compulsory one-day registration and orientation session to be conducted prior to the commencement of the formal training

3. EXPECTATION OF THE NPO TRAINING PROGRAM

The training programme must should be SAQA accredited for module 2 and 3 as follows:

YEAR	COURSE	BENEFICIARIES	Number of Days
YEAR 1:	Compulsory registration and orientation	1st Cohort: Group 1: Officials 47 Social Workers	Group 1: 1 Day Group 2: 1 Day
	Module 1: Basic Training On NPO Act As It Relates To ECD Sites		Group 1: 5 Days Group 2: 10 Days
	Module 2: Apply Accounting Principles And Procedures In The Preparation Of Reports And Decision Making <ul style="list-style-type: none"> • SAQA Accredited Unit Standard: 119350 • Level: 5 • Credits: 15 	Group 2: Members 2840 Board Members 1420 Matrons	Group 1: 3 Days Group 2: 8 Days
	Module 3: Apply Selected GRAP (Generally Recognised Accounting Practices) To Periodic Accounting Reporting Process <ul style="list-style-type: none"> • SAQA Accredited Unit Standard: 119348 • Level: 5 • Credits: 12 	Group 1: Officials 47 Social Workers	Group 1: 2 Days
	Module 4: Support for ECD sites to develop		Group 1: 30 Days

YEAR	COURSE	BENEFICIARIES	Number of Days
	4 policies.		
YEAR 2	Compulsory registration and orientation	2ND Cohort: Group 3: Officials 13 Subject Advisors Group 4: Members 2840 Board Members	Group 3: 1 Day Group 4: 1 Day
	Module 1: Basic Training On NPO Act As It Relates To ECD Sites		Group 3: 5 Days Group 4: 10 Days
	Module 2: Apply Accounting Principles And Procedures In The Preparation Of Reports And Decision Making <ul style="list-style-type: none"> • SAQA Accredited Unit Standard: 119350 • Level: 5 • Credits: 15 		Group 3: 3 Days Group 4: 8 Days
	Module 3: Apply Selected GRAP (Generally Recognised Accounting Practices) To Periodic Accounting Reporting Process <ul style="list-style-type: none"> • SAQA Accredited Unit Standard: 119348 • Level: 5 • Credits: 12 		Group 3: 2 Days
YEAR 2	Module 4: Support for ECD sites to develop 4 policies.		Group 3: 30 Days
YEAR 3	Compulsory registration and orientation	3rd Cohort: Group 5: Members 2840 Board Members	Group 4: 1 Day
	Module 1: <ul style="list-style-type: none"> • Basic Training On NPO Act As It Relates To ECD Sites 		Group 4: 10 Days
	Module 2: <ul style="list-style-type: none"> • Apply Accounting Principles And Procedures In The Preparation Of Reports And Decision Making 		SAQA Accredited Unit Standard: 119350 Level: 5 Credits: 15 Group 4: 8 Days

The Training Programme should be a **one year** course and be provided to three cohort of trainees within a period of three years as outlined above.

4. SPECIAL CONDITIONS

- Failure to submit proof of accreditation to provide training for module 2 and 3 will lead to automatic disqualification.
- The FSDoE reserves the right to decrease the number of participants based on availability of funds.

The numbers for the 2nd and 3rd year will be provided annually.

5. THE SUCCESSFUL BIDDER'S OBLIGATION

The successful bidder is obliged to:

- Conduct a kick off meeting with the FSDoE.
- Offer the course through face to face contact sessions.
- Conduct contact session during school holidays and weekends so that trainees can be able to attend the course while still working.
- Conduct pre-assessment of trainees before the commencement of the course.
- Conduct a registration and orientation session with the trainees before the course starts.
- Conduct continuous assessment activities that will lead to production of Portfolio of Evidence (PoE) resulting in the attainment of a Certificate of Competency.
- Conduct post-assessment of trainees at the end of the course and provide a detailed report.
- Conduct after-care with the intention to ensure that all trainees succeed and the remaining 10% of the cost will be paid after evidence that after-care was conducted and close-out report is submitted at the end of the training of each cohort. This must happen within 3 months after concluding the formal training per year.
- Adhere to deadlines agreed upon for the commencement and completion of the course.
- Provide training in identified venues per district, namely; Fezile Dabi, Lejweleputswa, Motheo, Thabo Mofutsanyana and Xhariep.
- Provide training material for trainees
- Ensure that all materials are user friendly
- Provide progress reports (two weeks after each training session including attendance registers).
- Provide on-site support after each training session.
- Provide trainees with an SAQA accredited certificate for module 2 and 3 on completion of the course.
- Arrange a graduation ceremony for all trainees.
- Adhere to all COVID-19 precautionary measures during all training sessions.
- Provide close-out report on annual basis after each year of the training.

The estimated number of trainees to be trained on the course per year:

District	Town	Year 1	Year 2	Year 3	Total
Officials	Bloemfontein	47	13		60
Fezile Dabi	VENUE 1: Sasolburg	219	146	146	511
	VENUE 2: Frankfort	144	96	96	336
	VENUE 3: Kroonstad	177	118	118	413
	VENUE 4: Parys	126	84	84	294
	SUB-TOTAL	666	444	444	1554
Lejweleputswa	VENUE 1: Welkom	342	228	228	798
	VENUE 2: Henneman	135	90	90	315
	VENUE 3: Dealesville	105	70	70	245

District	Town	Year 1	Year 2	Year 3	Total
	VENUE 4: Wesselsbron	150	100	100	350
	SUB-TOTAL	732	488	488	1708
Motheo	VENUE 1: Bloemfontein	369	246	246	861
	VENUE 2: Botshabelo	381	254	254	889
	VENUE 3: Thaba Nchu	351	234	234	819
	VENUE 4: Ladybrand	180	120	120	420
	SUB-TOTAL	1281	854	854	2989
Thabo Mofutsanyana	VENUE 1: Bethlehem	339	226	226	791
	VENUE 2: Qwaqwa	498	332	332	1162
	VENUE 3: Ficksburg	258	172	172	602
	VENUE 4: Warden	183	122	122	427
	SUB-TOTAL	1278	852	852	2982
Xhariep	VENUE 1: Rouxville	81	54	54	189
	VENUE 2: Trompsburg	132	88	88	308
	VENUE 3: Koffiefontein	90	60	60	210
	SUB-TOTAL	303	202	202	707
TOTALS		4307	2853	2840	10000

6. THE FREE STATE DEPARTMENT OF EDUCATION OBLIGATION

The Free State Department of Education (FSDoE) is obliged to:

- select trainees to be trained
- provide lists of trainees to be trained per district per year,
- provide venues for the training sessions,
- monitor training sessions and share findings with service provider.
- pay all amounts due and payable to the Service Provider as provided for in this agreement.

CONTACT DETAILS:

For enquiries regarding the specification:

Mr. LT Tladi must be contacted at (051) 4044321 during office hours. Cell: 0660159806

and/or via email; tladilethoteng@gmail.com / LT.Tladi@fseducation.gov.za

SBD 3.1

PRICING SCHEDULE – FIRM PRICES

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of bidder.....

Bid number: **E19/2022/2023**

Closing Time **11H00 on 13 JANUARY 2023**

OFFER TO BE VALID FOR **120 DAYS** FROM THE CLOSING DATE OF BID.

BID NUMBER	DESCRIPTION
E19/2022/2023	TRAINING OF EARLY EDUCATION DEVELOPMENT (EED) OFFICIALS, BOARD MEMBERS AND MATRONS ON ECD CENTRE MANAGEMENT AND ADMINISTRATION BASED ON THE NON-PROFIT ORGANISATION ACT, 1997 (ACT NO 71 OF 1997)
PERIOD	THREE YEARS FROM DATE OF APPROVAL (CONTINUATION OF THE TRAINING IN YEAR 2 AND YEAR 3 AS WELL AS THE NUMBER OF TRAINEES DEPENDS ON THE AVAILABILITY OF FUNDS.)
PRICE	PLEASE COMPLETE THE PRICING SCHEDULE ON PAGES 30 TO 33 COST PER UNIT 1 (PACK OF 10 SANITARY TOWELS) MUST BE ALL INCLUSIVE.
QUANTITIES	As per pricing schedule. Please note that the quantities indicated is an estimate. The department has the right to reduce the quantities depending on the availability of funds.

*Prices on SBD 3.1 should correspond with prices on pricing schedule.

Does offer comply with specification?

 YES/NO (Make an x on your answer)

If not to specification, indicate deviation(s)

.....

Is price Firm for contract period

 YES/NO (Make an x on your answer)

Delivery basis (all delivery costs **must** be included in the bid price)

.....

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

PRICING SCHEDULE

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

PRICING SCHEDULE

Year	Item	Estimated Number of Trainees	Price Per Trainee	Total price																
Year 1	Compulsory registration and orientation Module 1: <ul style="list-style-type: none">Basic Training On NPO Act As It Relates To ECD Sites	The breakdown for each district per year is as follows: <table><tr><th>District</th><th>No.</th></tr><tr><td>Social Workers</td><td>47</td></tr><tr><td>Fezile Dabi</td><td>666</td></tr><tr><td>Lejweleputswa</td><td>732</td></tr><tr><td>Motheo</td><td>1281</td></tr><tr><td>Thabo Mofutsanyana</td><td>1278</td></tr><tr><td>Xhariep</td><td>303</td></tr><tr><td>TOTAL</td><td>4 307</td></tr></table>	District	No.	Social Workers	47	Fezile Dabi	666	Lejweleputswa	732	Motheo	1281	Thabo Mofutsanyana	1278	Xhariep	303	TOTAL	4 307	R	R
	District	No.																		
Social Workers	47																			
Fezile Dabi	666																			
Lejweleputswa	732																			
Motheo	1281																			
Thabo Mofutsanyana	1278																			
Xhariep	303																			
TOTAL	4 307																			
	Module 2: <ul style="list-style-type: none">Apply Accounting Principles And Procedures In The Preparation Of Reports And Decision Making	The breakdown for each district per year is as follows: <table><tr><th>District</th><th>No.</th></tr><tr><td>Social Workers</td><td>47</td></tr><tr><td>Fezile Dabi</td><td>666</td></tr><tr><td>Lejweleputswa</td><td>732</td></tr><tr><td>Motheo</td><td>1281</td></tr><tr><td>Thabo Mofutsanyana</td><td>1278</td></tr><tr><td>Xhariep</td><td>303</td></tr><tr><td>TOTAL</td><td>4 307</td></tr></table>	District	No.	Social Workers	47	Fezile Dabi	666	Lejweleputswa	732	Motheo	1281	Thabo Mofutsanyana	1278	Xhariep	303	TOTAL	4 307	R	R
District	No.																			
Social Workers	47																			
Fezile Dabi	666																			
Lejweleputswa	732																			
Motheo	1281																			
Thabo Mofutsanyana	1278																			
Xhariep	303																			
TOTAL	4 307																			

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



Year	Item	Estimated Number of Trainees	Price Per Trainee	Total price																
	Module 3: <ul style="list-style-type: none">Apply Selected GRAP (Generally Recognised Accounting Practices) To Periodic Accounting Reporting Process	47 Social Workers	R	R																
	Module 4: <ul style="list-style-type: none">Support for ECD sites to develop 4 policies.	47 Social Workers	R	R																
	SUB-TOTAL FOR YEAR 1		R	R																
Year 2	Compulsory registration and orientation Module 1: <ul style="list-style-type: none">Basic Training On NPO Act As It Relates To ECD Sites	The breakdown for each district per year is as follows: <table><tr><th>District</th><th>No.</th></tr><tr><td>Subject Advisors</td><td>13</td></tr><tr><td>Fezile Dabi</td><td>444</td></tr><tr><td>Lejweleputswa</td><td>488</td></tr><tr><td>Motheo</td><td>854</td></tr><tr><td>Thabo Mofutsanyana</td><td>852</td></tr><tr><td>Xhariep</td><td>202</td></tr><tr><td>TOTAL</td><td>2 853</td></tr></table>	District	No.	Subject Advisors	13	Fezile Dabi	444	Lejweleputswa	488	Motheo	854	Thabo Mofutsanyana	852	Xhariep	202	TOTAL	2 853	R	R
District	No.																			
Subject Advisors	13																			
Fezile Dabi	444																			
Lejweleputswa	488																			
Motheo	854																			
Thabo Mofutsanyana	852																			
Xhariep	202																			
TOTAL	2 853																			

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



Year	Item	Estimated Number of Trainees	Price Per Trainee	Total price																
	Module 2: <ul style="list-style-type: none">Apply Accounting Principles And Procedures In The Preparation Of Reports And Decision Making	<p>The breakdown for each district per year is as follows:</p> <table><tr><th>District</th><th>No.</th></tr><tr><td>Subject Advisors</td><td>13</td></tr><tr><td>Fezile Dabi</td><td>444</td></tr><tr><td>Lejweleputswa</td><td>488</td></tr><tr><td>Motheo</td><td>854</td></tr><tr><td>Thabo Mofutsanyana</td><td>852</td></tr><tr><td>Xhariep</td><td>202</td></tr><tr><td>TOTAL</td><td>2 853</td></tr></table>	District	No.	Subject Advisors	13	Fezile Dabi	444	Lejweleputswa	488	Motheo	854	Thabo Mofutsanyana	852	Xhariep	202	TOTAL	2 853	R	R
District	No.																			
Subject Advisors	13																			
Fezile Dabi	444																			
Lejweleputswa	488																			
Motheo	854																			
Thabo Mofutsanyana	852																			
Xhariep	202																			
TOTAL	2 853																			
	Module 3: <ul style="list-style-type: none">Apply Selected GRAP (Generally Recognised Accounting Practices) To Periodic Accounting Reporting Process	13 Subject Advisors	R	R																
	Module 4: Support for ECD sites to develop 4 policies.	13 Subject Advisors	R	R																
	SUB-TOTAL FOR YEAR 2		R	R																

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

BID NO. E19/2022/2023

Portion 1: Tender

Part T2.1: Returnable Documents



Year	Item	Estimated Number of Trainees	Price Per Trainee	Total price														
Year 3	Compulsory registration and orientation	The breakdown for each district per year is as follows:	R	R														
	Module 1: <ul style="list-style-type: none">Basic Training On NPO Act As It Relates To ECD Sites	<table><tr><th>District</th><th>No.</th></tr><tr><td>Fezile Dabi</td><td>444</td></tr><tr><td>Lejweleputswa</td><td>488</td></tr><tr><td>Motheo</td><td>854</td></tr><tr><td>Thabo Mofutsanyana</td><td>852</td></tr><tr><td>Xhariep</td><td>202</td></tr><tr><td>TOTAL</td><td>2 840</td></tr></table>			District	No.	Fezile Dabi	444	Lejweleputswa	488	Motheo	854	Thabo Mofutsanyana	852	Xhariep	202	TOTAL	2 840
	District	No.																
Fezile Dabi	444																	
Lejweleputswa	488																	
Motheo	854																	
Thabo Mofutsanyana	852																	
Xhariep	202																	
TOTAL	2 840																	
Module 2: Apply Accounting Principles And Procedures In The Preparation Of Reports And Decision Making	The breakdown for each district per year is as follows:	<table><tr><th>District</th><th>No.</th></tr><tr><td>Fezile Dabi</td><td>444</td></tr><tr><td>Lejweleputswa</td><td>488</td></tr><tr><td>Motheo</td><td>854</td></tr><tr><td>Thabo Mofutsanyana</td><td>852</td></tr><tr><td>Xhariep</td><td>202</td></tr><tr><td>TOTAL</td><td>2 840</td></tr></table>	District	No.	Fezile Dabi	444	Lejweleputswa	488	Motheo	854	Thabo Mofutsanyana	852	Xhariep	202	TOTAL	2 840	R	R
District	No.																	
Fezile Dabi	444																	
Lejweleputswa	488																	
Motheo	854																	
Thabo Mofutsanyana	852																	
Xhariep	202																	
TOTAL	2 840																	
SUB-TOTAL FOR YEAR 3			R	R														
GRAND TOTAL AMOUNT FOR YEAR 1 – 3 (All inclusive)			R	R														

Note the following:

- All prices should include training costs, course material, certificates, graduation ceremony and VAT.

* The FSDoE reserves the right to decrease the number of participants based on availability of funds.

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

SBD FORMS TO BE COMPLETED AND SIGNED:

- **SBD 1**
- **SBD 4**
- **SBD 6.1**

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

SBD 4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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 / shareholders / members / partners or any person having a controlling interest¹ 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 institution	State

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.

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

SBD 4

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:

.....
.....

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 consortium² 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.

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.

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

- 3.4 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.
- 3.5 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.
- 3.6 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

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

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

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to 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

- a) The value of this bid is estimated to not to exceed R50 000 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable; or
- b) The 90/10 preference point system will be applicable to this tender

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

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

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

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

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“price”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

4. POINTS AWARDED FOR PRICE

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

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

80/20

or

90/10

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

Where

Ps = Points scored for price of bid under consideration

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

4.2 FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME-GENERATING PROCUREMENT

4.3 POINTS AWARDED FOR PRICE

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

80/20

or

90/10

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \text{ or } Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmax = Price of highest acceptable bid

5. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

5.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

6. BID DECLARATION

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

7. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

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

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

8. SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

8.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

Any QSE

9. DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm:.....

9.2 VAT registration number:.....

9.3 Company registration number:.....

9.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....
.....
.....COMPANY

CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

9.6 Total number of years the company/firm has been in business:.....

9.7 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

WITNESSES

1.

2.

.....
SIGNATURE(S) OF BIDDERS(S)

DATE:

.....

ADDRESS

.....

.....

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

**PROOF THAT TAX MATTERS ARE IN
ORDER:**

ATTACH:

- **PROOF OF REGISTRATION ON
CSD**

**PRINT OUT REPORT OF CSD
WITH PROOF OF COMPLIANT
TAX MATTERS**

- **TAX COMPLIANCE STATUS**

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

ATTACH:

1) CERTIFIED COPY OF COMPANY REGISTRATION CERTIFICATE REFLECTING ACTIVE MEMBERS

(CK1/CK2)/TRUST DEED/PTY LTD MEMORANDUM OF INCORPORATION/
CERTIFICATE OF INCORPORATION/ PARTNERSHIP AGREEMENT ETC.

2) ID DOCUMENTS OF DIRECTORS

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

IN CASE OF JOINT **VENTURE:**

ATTACH SIGNED JOINT VENTURE AGREEMENT (signed by both parties)

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

ATTACH VALID
AND ORIGINALLY
SIGNED/
ORIGINAL
CERTIFIED BBBEE
CERTIFICATE/
SWORN AFFIDAVIT
AND ENSURE THAT YOU COMPLETE AND SIGN THE SBD 6.1 FORM

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

ATTACH:

Proof of accreditation to provide training for module 2 and 3 should be submitted.

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

FUNCTIONALITY

ATTACH:

ANNEXURE A1:

SIGNED APPOINTMENT LETTER/

PURCHASE ORDER

(Ensure that the letters comply with criteria)

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

FUNCTIONALITY

ATTACH:

ANNEXURE A2:

SIGNED REFERENCE LETTER

**(Ensure that the letter comply
with criteria)**

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

FUNCTIONALITY

ATTACH:

ANNEXURE B:

STRUCTURED ORGANOGRAM

✓ **Preposed Team structure with
reporting lines**

✓ **Roles and responsibilities**

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

FUNCTIONALITY

ATTACH:

ANNEXURE C1:

Detail delivery Strategy/ Training plan

- ✓ Realistic time frames versus detailed activities
- ✓ How the project will be managed and how the service provider will ensure uninterrupted service and timely delivery

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

FUNCTIONALITY

ATTACH:

ANNEXURE C2:

DEMONSTRATE SUPPORT TO STUDENTS

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

ATTACH:

ANNEXURE C3:

Human resources capacity:

- Demonstrate how students will be evaluated/moderated continuously leading to completion of Portfolio of evidence
- Demonstrate how the assessment of students will be evaluated (pre-and post tests)

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

ATTACH:

ANNEXURE C4:

- Demonstrate ability to provide training on:

✓ **GRAP**

✓ **Policy development**

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

ATTACH:

ANNEXURE C5:

- Demonstrate orientation and graduation arrangements

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

FUNCTIONALITY

ATTACH:

ANNEXURE D:

ORIGINAL CERTIFIED

**SIGNED AND SOUND FINANCIAL
STATEMENTS/**

**AGREEMENT LETTER FROM
CREDIT PROVIDER**

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

FUNCTIONALITY

ATTACH:

ANNEXURE E:

MUNICIPAL ACCOUNT OR LEASE AGREEMENT

(In case of lease agreement **originally certified copies** of invoices/proof of payment by the tenant for the last three months as proof that the landlord has been paid by the tenant.)

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

CHECK LIST: SUMMARY OF FORMS TO BE COMPLETED AND REQUIREMENTS			
PLEASE ENSURE THAT YOU SIGN AND COMPLETE THE FOLLOWING DOCUMENTS:			
SBD FORM	DESCRIPTION	TO BE COMPLETED BY	COMMENTS ON COMPLIANCE BY SERVICE PROVIDER
STANDARDIZED BID FORMS			
SBD 1	Invitation to bid	To be completed and signed by the service provider.	
SBD 4	Declaration of interest	To be completed and signed by the service provider.	
SBD 6.1	Preference points claim form	To be completed and signed by the service provider in order to claim points	
SBD 3.1	Pricing schedule	Service Provider must: <ul style="list-style-type: none"> • Indicate price • Complete questions on the form 	
PLEASE ENSURE/PROOF THAT TAX MATTERS ARE IN ORDER BY SUBMITTING THE FOLLOWING DOCUMENT:			
TAX MATTERS TO BE IN ORDER			
CSD PRINT OUT SARS PIN	Service provider must proof valid tax matters by providing: <ul style="list-style-type: none"> • Each party to a Consortium/Joint Venture must submit a separate valid Tax Clearance Certificate/CSD printout report with the bid. • CSD printout report with compliant tax matters. • Tax compliance status 		
PLEASE ENSURE THE SUBMITTING OF THE FOLLOWING DOCUMENT:			
JOINT VENTURE AGREEMENT (if applicable)			
Joint Venture agreement (Compulsory if applicable)	In the event that a joint venture bid is submitted a signed joint venture agreement, witnessed by a registered Attorney at Law must be submitted with the bidding document. Failure to submit a signed joint venture agreement (signed by all the parties) will lead to disqualification of the bid.		
PLEASE ENSURE THE FOLLOWING:			
SPECIFICATION, SPECIAL CONDITIONS AND FUNCTIONALITY CRITERIA			
<ul style="list-style-type: none"> • Please ensure that you attach ALL documents as requested in specification, special conditions and functionality criteria. 			
ENSURE THAT YOU ATTACH A VALID BBBEE CERTIFICATE/SWORN AFFIDAVIT			
Only bidders with BBBEE level 1-3 will qualify. In case of a Joint Venture a consolidated B-BBEE certificate for the Joint venture company should be submitted. Please note if <u>BEE certificates/sworn affidavits for each company</u> is submitted and not a consolidated B-BBEE certificate your offer will be disqualify as proof of the correct BBBEE level for the JV cannot be determined.			

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2

GENERAL CONDITIONS OF CONTRACT IS APPLICABLE

www.treasury.gov.za

<http://www.treasury.gov.za/divisions/ocpo/sc/GeneralConditions/General%20Conditions%20of%20Contract.pdf>

Contractor

Witness 1

Witness 2

Employer

Witness 1

Witness 2