



## INDEPENDENT DEVELOPMENT TRUST

FREE STATE PROVINCE

PANEL FOR PROFESSIONAL SERVICE PROVIDERS

EXPRESSION OF INTEREST FOR PROFESSIONAL SERVICE PROVIDERS FOR THE  
PERIOD OF THREE (3) YEARS (PANEL OF PSPs)

TENDER NO: IDTFS-PANEL-2024-2027

CLOSING DATE: 02 August 2024

PREPARED BY:

INDEPENDENT DEVELOPMENT TRUST (IDT)

IDT FS Office  
46 2nd Ave,  
Westdene,  
Bloemfontein  
9300

BIDDER'S DETAILS	INFORMATION
Category (services rendered)	
Company Name	
Contact number	
Email address	
CSD number	
Company Physical address	

**NOTE:** Only one (1) category / discipline may be selected per each submission. As such a bidder may NOT submit one (1) submission for multiple categories / disciplines (i.e one (1) submission per one (1) category / discipline)

## 1. CATEGORIES/ DISCIPLINES

NO	DISCIPLINE	TICK ( applicable Box)
1	Project Managers	
2	Architects	
3	Quantity Surveyors	
4	Electrical and Mechanical Engineers	
5	Civil and Structural Engineers	
6	Occupational Health & Safety	

**Note 1: Bidders to ensure that the category / discipline selected in the table above is indicated on the cover page of this document.**

**Note 2: Bidders who are already appointed on the IDTFS-PANEL-2023-2026 for professional services will not be considered.**

- 1.1** Bidders must tick next to the category / discipline they are bidding for. **Only one (1) category / discipline may be selected per submission** (i.e if a bidder bid for more than one (1) of the above disciplines and bidder wishes to submit for all such disciplines, then the bidder must submit separate bid for each discipline selected.
- 1.2** The bidder must provide ALL requirements as outlined in Sections 8 and 9 of this document. Failure to comply with the requirements of section 9 of this bid document shall render the bid non-responsive and shall result in the bid being disqualified.
- 1.3** No submission shall be dependent on another submission. All requirements as outlined in this bid document shall be addressed in full per each submission.

## 2. BACKGROUND

### 2.1 IDT AS AN ENTITY

The Independent Development Trust (*hereinafter referred to as IDT*) is a Schedule 2 Public Entity governed by applicable legislative frameworks and a Deed of Trust. The organization is accountable to Parliament through the Minister of Public Works who is the Executive Authority.

The mandate of the IDT is to support and add value to the developmental agenda of government as indicated in the mission statement; “The IDT manages and delivers Integrated Social Infrastructure Programs on behalf of Government”.

In pursuit of this mandate, the IDT primarily operates as a strategic partner in the management, integration and implementation of certain government development programs.

The IDT has representation in all the provinces and is organized on the basis of regional offices. These offices have the authority to call for bids, conduct evaluation of bids and make recommendations to the Management Bid Adjudication Committee (MBAC) for award of bids.

## 3. PURPOSE OF EXPRESSION OF INTEREST / BID

The IDT as a custodian of implanting social infrastructure projects on behalf of Government has an obligation to adhere and full comply with the Standard for Infrastructure Procurement and Delivery Management (*hereinafter referred to as SIPDM*) in all stages of projects which require qualified and experienced Professional Service Providers (*hereinafter referred to as PSP / PSPs*). These PSPs are appointed through competitive bidding in line with the Supply Chain Management (SCM) Policy and SCM National Treasury regulation.

The purpose of this expression of interest is to pre-qualify relevant and capable PSPs from identified disciplines listed in this document in order to be enlisted on the IDT’s panel of PSPs for the FS Region for a period of three (3) years from the date of panel approval. Qualified PSPs will be invited on rotational basis as when the need arises. The IDT further reserves the right to cancel any invitation to submit pricing proposals / RFQs from the panel of PSPs and approach the market (open bid) for services whenever it is considered that better value in terms of time, cost and quality may be obtained by doing it that way.

### Important panel conditions

- (i) IDT will **only** invite pre-qualified PSPs from the panel with requisite experience and capacity to submit pricing proposals / RFQs from any of the selected type of works based on project size and complexity, advancement of certain designated groups in line with section 2(1) of the PPPFA (Act 5 of 2000).
- (ii) PSP who are poorly performing from active projects may not be invited for request for quotations for future projects. The project managers will submit quarterly performance

reports to SCM in order for SCM unit to decide on excluding non-performing PSP from further request for quotation invitations.

- (iii) PSPs that have been terminated and/or been put on terms more than once within the IDT for non-performance will not be considered from pricing proposals / RFQs.

## **4. SCOPE OVERVIEW**

### **4.1 Objective of this document**

This document calls for PSPs accredited in the relevant disciplines listed below to submit their bid proposal in order to be enlisted in the PSPs' panel for the period of three (3) years from the date of approval of this panel:

- 4.1.1 Project Manager**
- 4.1.2 Architects**
- 4.1.3 Quantity Surveyors**
- 4.1.4 Electrical and Mechanical Engineers**
- 4.1.5 Civil and Structural Engineers**
- 4.1.6 Occupational Health & Safety**

Depending on the nature and requirements of specific projects that pricing proposals / RFQs will be issued out for, the following disciplines may be required / added as disbursements to those indicated above and will be indicated accordingly in the pricing proposals / RFQs;

- 4.2.1 Geo-technology**
- 4.2.2 Heritage Services**
- 4.2.3 Furniture and equipment specialists / Interior designer**
- 4.2.4 Information Technology**
- 4.2.5 Fire Services**
- 4.2.6 Wet Services**
- 4.2.7 Landscaping services**
- 4.2.8 Land Surveying**
- 4.2.9 Geo-Hydrologist**
- 4.2.10 Environmental Specialist**

**Any other specialized service required for the successful implementation Note:** Only disciplines / services listed in items 4.1.1 to 4.1.6 may be bidden for as part of this document.

### **4.3 Ethical Consideration**

At the core of all PSPs in the Built Environment and allied professions, there is a government gazette which is based on a corresponding Act of Parliament. The gazette outlines the tasks and responsibilities typical of each profession at every construction stage, the fee structures, and the typical deliverables of each profession. Each PSP is expected to abide by any of the Professional Services Contracts available on the market which the IDT may choose to use for specific projects. These include, but are not limited to the Professional Services Agreement (PROCSA), and the CIDB Standard Professional Services Contract and their variations or adaptations that may be tailored to suit the IDT.

The obligations and responsibilities for each part are outlined in these contracts, as well as dispute resolution processes.

Ethical issues such as conflict of interest and corruption, confidentiality and copyright, are covered in the Professional Services Agreements that the IDT may choose to use for particular contracts.

## **5. SCOPE DESCRIPTION**

### **5.1 Built Environment Professions**

As outlined in (3.2) above, each built environment profession will be guided by a government gazette that outlines the scope of services. Other allied professions which are outside the built environment also have their scope of services, but for purposes of this document, scope of work for the built environment professions only is outlined as follows:-

- (i) For Engineering Professionals (civil, structural, mechanical, electrical etc.) the scope of services and applicable rates will be in terms of the gazetted rates and services as contained in the Engineering Council of South Africa (ECSA) under section 34(2) of Engineering Professions Act, 2000 (Act No. 46 of 2000).
- (ii) For the Construction Project Management and Occupational Health and Safety Professionals, scope of services and applicable rates will be in terms of the gazetted rates and services as contained in The South African Council for Project & Construction Management Professionals (SACPCMP) under Section 34(2) of the Project and Construction Management Profession Act, 2000 (Act 48 of 2000).
- (iii) For the Architectural Profession, scope of services and applicable rates will be in terms of the gazette rates and services as contained in The South African Council for the Architectural Profession (SACAP) under Section 34(2) of the Architectural Profession Act 2000 (Act 44 of 2000).

- (iv) For the Quantity Surveying Profession, the scope of services and applicable rates will be in terms of the gazette rates and services as contained in the South African Council for the Quantity Surveying Profession (SACQSP) under Section 34(2) of the Quantity Surveying Profession Act 2000 (Act 49 of 2000).

## **5.2 Scope of Allied Professions to the Built Environment Professions**

Section 3 recognizes that, increasingly, the organization may from time to time need to use PSPs which may not necessarily fall under the Built Environment, but which may be critical for successful implementation of various projects, be it on once-off or on continuous basis. Such services, but not limited to disciplines contained in Section (4) of this document.

## **5.3 SCOPE FOR PROFESSIONAL SERVICES**

The Professional Service Provider's appointed on the panel will be responsible for but not limited to the following activities:

- Respond to all calls for repairs, remedial work, and replacements;
- Supervision for the replacement of damaged, worn out, or broken off fence sections;
- Steel palisade, concrete palisade, and all other fencing systems within the organization;
- Fencing installation as needed;
- Construction of New various facilities
- Upgrades and Additions for various facilities
- Water and Sanitation Services
- Installation of Boreholes
- Conduct investigations and provide corrective action on all work pertaining to various construction projects within the IDT Organization;
- Responds to all requests as they come in and identifies repair work-related activities with the organization.
- Betterment and Re-gravelling of Roads
- Construction of New Roads
- Upgrade of Gravel Road to Blacktop Roads
- Rehabilitation of Blacktop Road (Light and Heavy)
- Blading of Gravel Roads
- Construction of Culverts
- Construction of New Bridges and Rehabilitation
- Emergency Road Repairs
- Blacktop Patching
- Construction of Sidewalk

## 6 GOVERNANCE AND ACCOUNTABILITY

The IDT's Supply Chain Management Policy and Procedures will apply during the bidding process and appointment of PSPs enlisted in the panel. The successful PSPs will be held to the strictest letter of the law when complying with the governing body for the respective professional group, as explained in Sections (5.1); (5.2) & (5.3) of this document. As a matter of principle for the successful outcome of the project/s, impeccable and scrupulous **professional conduct** will be expected at all times.

## 7 PROFESSIONAL QUALIFICATIONS

Read in conjunction with Sections 8 and 9 of this document, the successful bidder/s will be one/s that is/are:

- (i) Professionally registered with the appropriate professional councils, backed by an appropriate Act of Parliament as may be required (eg ECSA, SACPCMP, SACQSP, SACAP including the allied professions not included in the Built environment);
- (ii) Have an appropriate relevant qualification, from a reputable faculty of Higher Education within South Africa.
- (iii) In the case of foreign qualifications these should be SAQA approved (bidder to provide evidence);
- (iv) Have a minimum of 5 years' experience in the field of specialization post acquiring professional registration.

## 8 SPECIAL BID CONDITIONS

- (i) At least one or more of the Company Director/s must be actively professionally registered with more than 51% or more shareholding with the relevant discipline in order for the bid to be considered for evaluation. (If none of the Company Directors registered in the CK document are not registered with the relevant discipline, the bid shall be regarded as non-responsive and shall be disqualified). **Note: Any company that removes the Professionally Registered Director within their company shall be excluded from the RFQ process until they are able provide an equally registered Director for the company.**
- (ii) Tenderers must only undertake work which their education, training and experience have rendered them competent to perform and is within the category of their registration.
- (iii) For Engineering disciplines, the PSP shall only be considered for other different Engineering disciplines for the Panel if:

- The tenderer has a proven track record in the field / discipline.
  - The discipline leader is professionally registered and qualified for the particular discipline / field.
  - The discipline is fully capacitated, with qualified and/or registered support personnel in the particular discipline / field.
- (iv) The IDT shall not be liable to reimburse any costs incurred by the bidder during this bidding process.
- (v) Request for clarification must be directed to the dedicated email five (5) working days before the closing date & time, as stated in the cover page.
- (vi) Communication between the IDT and the bidder/s shall be in writing and shall be in the English language. The IDT shall not take any responsibility for non-receipt of communications from or by a bidder/s.
- (vii) Evaluation of this bid shall be carried out by the IDT's Bid Evaluation Committee (BEC). The Evaluator(s) shall, if necessary, contact bidders to seek clarification of any aspect of the bid.
- (viii) Bidders are prohibited to make any alterations or additions to this bid document, except to comply with instructions issued by the IDT. All signatories to the bid offer shall initial all such alterations. Erasures and the use of masking fluid are prohibited.
- (ix) It is expected that bidders are familiar with the geographical landscape of Free State Province.

## **9 MANDATORY RETURNABLE DOCUMENTS**

Failure to submit one of the mandatory requirements listed below shall result in the bid being non-responsive and shall be disqualified:

- (i) Fully completed and signed Standard Bidding Documents as contained in the bid document (SBD 1; SBD 4; SBD 6.1)
- (ii) Detailed full CIPC certificate or other authentic proof of company ownership documents.
- (iii) Certified ID Copies of Directors (certification not older three (3) months from bid closing date)
- (iv) A Valid Shareholding certificate depicting the Company Director/s shareholding
- (v) Valid Proof of professional registration from the relevant council for the company director/(s)
- (vi) Compensation for Occupational Injuries and Diseases Act Certificate (COIDA) or Federated Employers Mutual Assurance (FEMA) Insurance
- (vii) Proof of indemnity insurance of R 3,000,000.00 (Three Million Rands) and above (Note:



PI insurance required may differ from the aforementioned for each project when pricing proposals / RFQs are issued out and will be required per project)

(viii) Notarised Joint Venture Agreement (where applicable)

**Note: Failure to comply with any of the above-mentioned requirements shall render the bid non-responsive and shall result in automatic disqualification of the bid response.**

## **10 RETURNABLE DOCUMENTS**

- (ix) Proof of National Treasury (NT) Central Supplier Database Registration i.e. submit a copy of CSD Master Registration Number (Supplier Number)
- (x) Valid Tax Compliance Letter with a unique pin
- (xi) Proof of existing company offices (municipal bills or lease agreement will be accepted)
- (xii) PSPs that are located outside the Free State Province with no existing branches in the province are required to sign a declaration to accept that they shall set up a satellite office should they be awarded work to the construction value of R20 Million or more.

## **11 EVALUATION CRITERIA**

The bid evaluation will be carried out on conclusion of mandatory returnable documents check and shall be subject to Section (9)

The bid evaluation criteria will be functionality based as contemplated in the Preferential Procurement Policy Framework Act, Act No. 5 of 2000 and its regulation of 2022:

### **11.1 STAGE 1 – Functionality**

**NB// should a bidder select more than one (1) discipline / category, they must submit different functionality requirement for each discipline selected. (refer to Section (1-1-1.3))**

#### **11.1.1 Evaluation Criteria**

**Method 2 of evaluation of tender offers is applicable.**

The bids will be evaluated on functionality. Entities must score a minimum of **70%** on functionality to qualify for further evaluation. 80/20 or 90/10 Preference Point System in line with Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000), Regulations of 2022 will be applicable.

#### 11.1.1.1 Functionality Criteria

Criteria	Possible Maximum Score
Qualification, Registration and Experience of key personnel	70
Company's Experience in managing Building Projects	20
Client References	10
<b>TOTAL</b>	<b>100</b>

**a. Qualification, Registration and Experience of key personnel (70 points):**

Points are allocated for professional qualifications, professional registration and experience of allocated key personnel currently employed by the bidder for the panel under consideration. For each key personnel allocated to the project, the bidder shall submit the following: Curriculum Vitae together with certified proof of qualifications and professional registration.

**b. Company's experience in managing building projects (20 points):**

Points are allocated for the bidding entity's experience in managing construction related projects **completed** (not currently running) in the past 15 years. The experience refers to major projects managed by the entity which are largely comprised of all types of construction works which have the complexity and value in accordance with the estimated construction cost for this project.

**To score points for the above, bidders are required to submit the following:**

- 11.1.1.1.1 Letters of appointments for projects listed under the "Project Experience" returnable schedule.
- 11.1.1.1.2 Confirmation of project completion by the Client for projects listed under the "Project Experience" returnable schedule.

**NB: Non-submission of any of the above-mentioned documents confirming bidder's experience will result in the bidder not scoring any points.**

**c. Client References on company's experience in managing Building projects (10 points):** Points are allocated for performance of the bidders on previous projects completed. Client Reference Scorecards" shall be submitted for scoring (see returnable).

Evaluation points will be awarded in terms of the following tables:

i. **EVALUATION CRITERIA FOR PROJECT MANAGERS**

**Qualifications of Proposed Resources (70 Points)**

<b>10.1.2.1 - Evaluation sub-criteria: Qualifications of proposed resources (10 points)</b>		
<b>Name of Staff Member</b>	<b>Qualification (10 points)</b>	
	<b>Diploma</b>	<b>Degree</b>
1. Accountable professional: Project Leader	2.5	5
2. Responsible Professional: Project Manager	2.5	5
<b>Subtotal number of points</b>	<b>5</b>	<b>10</b>

**Professional Registration of Proposed Resources**

<b>10.2.2.2 - Evaluation sub-criteria: Professional Registration of proposed resources (30 points)</b>		
<b>Name of Staff Member</b>	<b>Professional Registration</b>	
	<b>None</b>	<b>Pr. CPM</b>
1. Accountable professional; Project Leader	0	15
2. Responsible Professional; Project Manager	0	15
<b>Subtotal number of points</b>	<b>0</b>	<b>30</b>

**Experience of Proposed Resources**

<b>10.1.2.3 – Evaluation sub-criteria: Experience of proposed key personnel (30 points)</b>			
<b>Name of Proposed Personnel</b>	<b>Experience of proposed key personnel, post professional registration (30 points)</b>		
	<b>Less than 5 Years</b>	<b>5 - 10 Years</b>	<b>Over 10 Years</b>
1. Accountable professional: Project Leader	5	10	15
2. Responsible Professional: Project Manager	5	10	15
<b>Sub-total number of points</b>	<b>10</b>	<b>15</b>	<b>30</b>

**Company experience in managing major built environment projects (20points)**

<b>Project</b>	<b>Project fees less than R1 million</b>	<b>Project fees between R1 – R3 million</b>	<b>Project fees between R3 – R5 million</b>
Project 1	2	4	6.66
Project 2	2	4	6.67
Project 3	2	4	6.67
<b>Sub-total number of points</b>	<b>6</b>	<b>12</b>	<b>20</b>

**Client References on company's experience in managing major built environment projects (10 points):**

<b>Evaluation sub-criteria: Client's Reference (10 points)</b>				
<b>Projects</b>	<b>Overall assessment by Client</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
<b>Total number of points</b>	<b>0</b>	<b>3</b>	<b>6</b>	<b>10</b>

<b>Points allocation Project 1: (3.34 points)</b>				
<b>Performance indicator</b>	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.668
Indicator 2	0	0.2	0.4	0.668
Indicator 3	0	0.2	0.4	0.668
Indicator 4	0	0.2	0.4	0.668
Indicator 5	0	0.2	0.4	0.668
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.34</b>

<b>Points allocation Project 2-3: (3.33 points)</b>				
<b>Performance indicator</b>	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.666
Indicator 2	0	0.2	0.4	0.666
Indicator 3	0	0.2	0.4	0.666
Indicator 4	0	0.2	0.4	0.666
Indicator 5	0	0.2	0.4	0.666
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.33</b>

ii. **EVALUATION CRITERIA FOR ARCHITECT AND QUANTITY SURVEYORS**

**Qualifications of Proposed Resources (70 Points)**

<b>10.1.3.1 - Evaluation sub-criteria: Qualifications of proposed resources (10 points)</b>		
<b>Name of Staff Member</b>	<b>Qualification (10 points)</b>	
	<b>Diploma</b>	<b>Degree</b>
1. Accountable professional: Project Leader	2.5	5
2. Responsible Professional: Project Manager	2.5	5
<b>Subtotal number of points</b>	<b>5</b>	<b>10</b>

**Professional Registration of Proposed Resources**

<b>10.2.3.2 - Evaluation sub-criteria: Professional Registration of proposed resources (30 points)</b>		
<b>Name of Staff Member</b>	<b>Professional Registration</b>	
	<b>Pr. Technologist Arch / QS</b>	<b>Pr. Arch / QS</b>
1. Accountable professional: Project Leader	10	15
2. Responsible Professional: Project Manager	10	15
<b>Subtotal number of points</b>	<b>20</b>	<b>30</b>

**Experience of Proposed Resources**

<b>10.1.2.3 – Evaluation sub-criteria: Experience of proposed key personnel (30 points)</b>			
<b>Name of Proposed Personnel</b>	<b>Experience of proposed key personnel, post professional registration (30 points)</b>		
	<b>Less than 5 Years</b>	<b>5 - 10 Years</b>	<b>Over 10 Years</b>
1. Accountable professional: Project Leader	5	10	15
2. Responsible Professional: Project Manager	5	10	15
<b>Sub-total number of points</b>	<b>10</b>	<b>15</b>	<b>30</b>

**Company experience in managing built environment projects (20 points)**

<b>Project</b>	<b>Project fees less than R1 million</b>	<b>Project fees between R1 – R3 million</b>	<b>Project fees between R3 – R5million</b>
Project 1	2	4	6.66
Project 2	2	4	6.67
Project 3	2	4	6.67
<b>Sub-total number of points</b>	<b>6</b>	<b>12</b>	<b>20</b>

**Client References on company's experience in managing built environment projects (10 points):**

<b>Evaluation sub-criteria: Client's Reference (10 points)</b>				
Projects	<b>Overall assessment by Client</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
<b>Total number of points</b>	<b>0</b>	<b>3</b>	<b>6</b>	<b>10</b>

<b>Points allocation Project 1: (3.34 points)</b>				
Performance indicator	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.668
Indicator 2	0	0.2	0.4	0.668
Indicator 3	0	0.2	0.4	0.668
Indicator 4	0	0.2	0.4	0.668
Indicator 5	0	0.2	0.4	0.668
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.34</b>

<b>Points allocation Project 2-3: (3.33 points)</b>				
Performance indicator	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.666
Indicator 2	0	0.2	0.4	0.666
Indicator 3	0	0.2	0.4	0.666
Indicator 4	0	0.2	0.4	0.666
Indicator 5	0	0.2	0.4	0.666
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.33</b>

iii.

### EVALUATION CRITERIA FOR ENGINEERS Qualifications of Proposed Resources (70 Points)

10.1.4.1 - Evaluation sub-criteria: Qualifications of proposed resources (10 points)		
Name of Staff Member	Qualification (10 points)	
	Diploma	Degree
1. Accountable professional: Project Leader	2.5	5
2. Responsible Professional: Project Manager	2.5	5
<b>Subtotal number of points</b>	<b>5</b>	<b>10</b>

### Professional Registration of Proposed Resources

10.2.4.2 - Evaluation sub-criteria: Professional Registration of proposed resources (30 points)		
Name of Staff Member	Professional Registration	
	Pr. Technologist	Pr. Eng
1. Accountable professional: Project Leader	10	15
2. Responsible Professional: Project Manager	10	15
<b>Subtotal number of points</b>	<b>20</b>	<b>30</b>

### Experience of Proposed Resources

10.1.2.3 – Evaluation sub-criteria: Experience of proposed key personnel (30 points)			
Name of Proposed Personnel	Experience of proposed key personnel, post professional registration (30 points)		
	Less than 5 Years	5 - 10 Years	Over 10 Years
1. Accountable professional: Project Leader	5	10	15
2. Responsible Professional: Project Manager	5	10	15
<b>Sub-total number of points</b>	<b>10</b>	<b>20</b>	<b>30</b>

### Company experience in managing built environment projects (20 points)

Project	Project fees less than R1 million	Project fees between R1 – R3 million	Project fees between R3 – R5 million
Project 1	2	4	6.66
Project 2	2	4	6.67
Project 3	2	4	6.67
<b>Sub-total number of points</b>	<b>6</b>	<b>12</b>	<b>20</b>

**Client References on company's experience in managing building projects (10 points):**

<b>Evaluation sub-criteria: Client's Reference (10 points)</b>				
<b>Projects</b>	<b>Overall assessment by Client</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
<b>Total number of points</b>	<b>0</b>	<b>3</b>	<b>6</b>	<b>10</b>

<b>Points allocation Project 1: (3.34 points)</b>				
<b>Performance indicator</b>	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.668
Indicator 2	0	0.2	0.4	0.668
Indicator 3	0	0.2	0.4	0.668
Indicator 4	0	0.2	0.4	0.668
Indicator 5	0	0.2	0.4	0.668
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.34</b>

<b>Points allocation Project 2-3: (3.33 points)</b>				
<b>Performance indicator</b>	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.666
Indicator 2	0	0.2	0.4	0.666
Indicator 3	0	0.2	0.4	0.666
Indicator 4	0	0.2	0.4	0.666
Indicator 5	0	0.2	0.4	0.666
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.33</b>



iv. **EVALUATION CRITERIA FOR OHS**

**Qualifications of Proposed Resources (70 Points)**

<b>10.1.5.1 - Evaluation sub-criteria: Qualifications of proposed resources (10 points)</b>		
<b>Name of Staff Member</b>	<b>Qualification (10 points)</b>	
	<b>Diploma</b>	<b>Degree</b>
1. Accountable professional: Project Leader	2.5	5
2.Responsible Professional: Project Manager	2.5	5
<b>Subtotal number of points</b>	<b>5</b>	<b>10</b>

**Professional Registration of Proposed Resources**

<b>10.2.5.2 - Evaluation sub-criteria: Professional Registration of proposed resources (30 points)</b>		
<b>Name of Staff Member</b>	<b>Professional Registration</b>	
	<b>CHSM</b>	<b>Pr. CHSA</b>
1. Accountable professional: Project Leader	10	15
2.Responsible Professional: Project Manager	10	15
<b>Subtotal number of points</b>	<b>20</b>	<b>30</b>

**Experience of Proposed Resources**

<b>10.1.5.3 – Evaluation sub-criteria: Experience of proposed key personnel (30 points)</b>			
<b>Name of Proposed Personnel</b>	<b>Experience of proposed key personnel, post professional registration (16 points)</b>		
	<b>Less than 5 Years</b>	<b>5 - 10 Years</b>	<b>Over 10 Years</b>
1. Accountable professional:Project Leader	5	10	15
2.Responsible Professional: Project Manager	5	10	15
<b>Subtotal number of points</b>	<b>10</b>	<b>15</b>	<b>30</b>

**Company experience in managing built environment projects (20 points)**

<b>Project</b>	<b>Project fees less than R1 million</b>	<b>Project fees between R1 – R3 million</b>	<b>Project fees between R3 – R5million</b>
Project 1	2	4	6.66
Project 2	2	4	6.67
Project 3	2	4	6.67
<b>Sub-total number of points</b>	<b>6</b>	<b>12</b>	<b>20</b>

**Client References on company's experience in managing built environment projects (10 points):**

<b>Evaluation sub-criteria: Client's Reference (10 points)</b>				
Projects	<b>Overall assessment by Client</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
<b>Total number of points</b>	<b>0</b>	<b>3</b>	<b>6</b>	<b>10</b>

<b>Points allocation Project 1: (3.34 points)</b>				
Performance indicator	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.668
Indicator 2	0	0.2	0.4	0.668
Indicator 3	0	0.2	0.4	0.668
Indicator 4	0	0.2	0.4	0.668
Indicator 5	0	0.2	0.4	0.668
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.34</b>

<b>Points allocation Project 2-3: (3.33 points)</b>				
Performance indicator	<b>Overall assessment per Project</b>			
	<b>Poor</b>	<b>Fair</b>	<b>Good</b>	<b>Excellent</b>
Indicator 1	0	0.2	0.4	0.666
Indicator 2	0	0.2	0.4	0.666
Indicator 3	0	0.2	0.4	0.666
Indicator 4	0	0.2	0.4	0.666
Indicator 5	0	0.2	0.4	0.666
<b>Total points</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3.33</b>

### **10.1 STAGE 2 – Price and Specific Goals Evaluation (Not Applicable for this bid)**

- (i) The stage 2 will only be applicable during request for quotations which will be limited to only PSP who will be approved in the panel for price and preferential goals point allocation.
- (ii) When pricing proposals / RFQs are called for, bidders that will be invited to bid in line with the IDT's SCM Policy will be required to submit proof of evidence for specific goals for the allocation of points.

### **10.2 General Condition**

- (i) No late, bids, copies, e-mailed or faxed documents will be considered.
- (ii) Bids must be submitted by no later than 11h00 on 02 August 2024. Any bid documents received after closing date and time will not be considered.

### **10.3 DISCLAIMER**

- (i) IDT reserves the right to cancel or withdraw this expression of interest without prior notice and without furnishing any reasons whatsoever.
- (ii) Should the bid be cancelled by the IDT, for any reasons, the IDT shall not be liable to remunerate the service provider for any potential loss of business and any cost/s incurred in relation to bid.

**DECLARATION THAT INFORMATION ON CENTRAL SUPPLIER DATABASE (CSD) IS CORRECT  
AND UP TO DATE**  
(To be completed by bidder)

**THIS IS TO CERTIFY THAT I (name of bidder/authorised representative)**

.....

**WHO REPRESENTS (state name of bidder)**

.....

**I AM AWARE OF THE CONTENTS OF THE CENTRAL SUPPLIER DATABASE WITH RESPECT TO  
THE BIDDER’S DETAILS AND REGISTRATION INFORMATION, AND THAT THE SAID  
INFORMATION IS CORRECT AND UP TO DATE AS ON THE DATE OF SUBMITTING THIS BID.**

**AND I AM AWARE THAT INCORRECT OR OUTDATED INFORMATION MAY BE A CAUSE FOR  
DISQUALIFICATION OF THIS BID FROM THE BIDDING PROCESS, AND/OR POSSIBLE  
CANCELLATION OF THE CONTRACT THAT MAY BE AWARDED ON THE BASIS OF THIS BID.**

.....  
**SIGNATURE OF BIDDER OR AUTHORISED REPRESENTATIVE**

**DATE:.....**

## **SPECIAL INSTRUCTIONS AND NOTICES TO BIDDERS REGARDING THE COMPLETION OF BIDDING FORMS**

PLEASE NOTE THAT THIS BID IS SUBJECT TO TREASURY REGULATIONS 16A ISSUED IN TERMS OF THE PUBLIC FINANCE MANAGEMENT ACT, 1999, THE FREE STATE SUPPLY CHAIN MANAGEMENT POLICY FRAMEWORK AND THE GENERAL CONDITIONS OF CONTRACT.

1. Unless inconsistent with or expressly indicated otherwise by the context, the singular shall include the plural and vice versa and with words importing the masculine gender shall include the feminine and the neuter.
2. Under no circumstances whatsoever may the bid forms be retyped or redrafted. Photocopies of the original bid documentation may be used, but an original signature must appear on such photocopies.
3. The bidder is advised to check the number of pages and to satisfy himself that none are missing or duplicated.
4. Bids submitted must be complete in all respects.
5. Bids shall be lodged at the address indicated not later than the closing time specified for their receipt, and in accordance with the directives in the bid documents.
6. Each bid shall be addressed in accordance with the directives in the bid documents and shall be lodged in a separate sealed envelope, with the name and address of the bidder, the bid number and closing date indicated on the envelope. The envelope shall not contain documents relating to any bid other than that shown on the envelope. If this provision is not complied with, such bids may be rejected as being invalid.
7. All bids received in sealed envelopes with the relevant bid numbers on the envelopes are kept unopened in safe custody until the closing time of the bids. Where, however, a bid is received open, it shall be sealed. If it is received without a bid number on the envelope, it shall be opened, the bid number ascertained, the envelope sealed and the bid number written on the envelope.
8. A specific box is provided for the receipt of bids, and no bid found in any other box or elsewhere subsequent to the closing date and time of bid will be considered.
9. No bid sent through the post will be considered if it is received after the closing date and time stipulated in the bid documentation, and proof of posting will not be accepted as proof of delivery.
10. No bid submitted by telefax, telegraphic or other electronic means will be considered.
11. Bidding documents must not be included in packages containing samples. Such bids may be rejected as being invalid.
12. Any alteration made by the bidder must be initialled.
13. Use of correcting fluid is prohibited
14. Bids will be opened in public as soon as practicable after the closing time of bid.
15. Where practical, prices are made public at the time of opening bids.
16. If it is desired to make more than one offer against any individual item, such offers should be given on a photocopy of the page in question. Clear indication thereof must be stated on the schedules attached.
17. The bidder must initial each and every page of the document.

## CONDITIONS OF BID

1. I/We hereby bid to supply all or any of the supplies and/or to render all or any of the services described in the attached documents to the Free State Provincial Administration (hereinafter called the "Province") on the terms and conditions and be in accordance with the specifications stipulated in the bid documents (and which shall be taken as part of and be incorporated into this bid) at the prices and on the terms regarding time for delivery and/or execution inserted therein.
2. I/we agree that:
  - (a) the offer herein shall remain binding upon me and open for acceptance by the Province during the validity period indicated and calculated from the closing time of the bid;
  - (b) this bid and its acceptance shall be subject to Treasury Regulations 16A issued in terms of the Public Finance Management Act, 1999, the National Treasury General Conditions of Contract and Standard Bidding Documents, the Free State Supply Chain Management Policy Framework, the Provincial Treasury issued Practice Notes, and the Free State Conditions of Contract, with which I/we am fully acquainted;
  - (c) if I/we withdraw my bid within the period for which I/we have agreed that the bid shall remain open for acceptance, or fail to fulfil the contract when called upon to do so, the Province may, without prejudice to its other rights, agree to the withdrawal of my bid or cancel the contract that may have been entered into between me and the Province. I/we will then pay to the Province any additional expenses incurred by the Province having either to accept any less favourable bid or, if fresh bids have to be invited, the additional expenditure incurred by the invitation of fresh bids and by the subsequent acceptance of any less favourable bid. The Province shall have the right to recover such additional expenditure by set-off against monies which may be due to me under this or any other bid or contract or against any guarantee or deposit that may have been furnished by me or on my behalf for the due fulfilment of this or any other bid or contract and pending the ascertainment of the amount of such additional expenditure to retain such monies, guarantee or deposit as security for any loss the Province may sustain by reason of my default;
  - (d) if my bid is accepted, the acceptance may be communicated to me by registered post, and that the South African Post Office Limited shall be treated as delivery agent to me;
  - (e) the law of the Republic of South Africa shall govern the contract created by the acceptance of my bid and I choose *domicilium citandi et executandi* in the Republic at (full physical address) :  
.....  
.....
3. I/we furthermore confirm that I/we have satisfied myself as to the correctness and validity of my bid: that the price(s), rate(s) and preference quoted cover all of the work/item(s) and my obligations under a resulting contract, and I accept that any mistakes regarding the price(s) and calculations will be at my risk.
4. I/we hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement, as the Principal(s) liable for the due fulfilment of this contract.
5. I/we agree that any action arising from this contract may in all respects be instituted against me and I/we hereby undertake to satisfy fully any sentence or judgement which may be pronounced against me as a result of such action.
6. I/we confirm that I/we have declared all and any interest that I or any persons related to my business has with regard to this bid or any related bids by completion of the Declaration of Interest Section.

**7.CERTIFICATION OF CORRECTNESS OF INFORMATION SUPPLIED IN THIS DOCUMENT**

I/we, THE UNDERSIGNED, WHO WARRANT THAT I AM DULY AUTHORISED TO DO SO ON BEHALF OF THE BIDDER, CERTIFY THAT THE INFORMATION SUPPLIED IN TERMS OF THIS DOCUMENT IS CORRECT AND TRUE, THAT THE SIGNATORY TO THIS DOCUMENT IS DULY AUTHORISED AND ACKNOWLEDGE THAT:

- 7.(1) The bidder will furnish documentary proof regarding any bidding issue to the satisfaction of the Province, if requested to do so.
- 7.(2) If the information supplied is found to be incorrect and/or false then the Province, in addition to any remedies it may have, may:-
- (a) Recover from the contractor all costs, losses or damages incurred or sustained by the Province as a result of the award of the contract, and/or
  - (b) Cancel the contract and claim any damages which the Province may suffer by having to make less favourable arrangements after such cancellation.

**SIGNED ON THIS ..... DAY OF ..... 20 ..... AT .....**

.....  
**SIGNATURE OF BIDDER OR DULY  
AUTHORISED REPRESENTATIVE**

.....  
**NAME IN BLOCK LETTERS**

**ON BEHALF OF (BIDDER'S NAME)** .....

**CAPACITY OF SIGNATORY** .....

**NAME OF CONTACT PERSON (IN BLOCK LETTERS, PLEASE)** .....

.....  
**POSTAL ADDRESS** .....

.....  
**TELEPHONE NUMBER:** .....

**FAX NUMBER:** .....

**CELLULAR PHONE NUMBER:** .....

**E-MAIL ADDRESS:** .....

## PART A INVITATION TO BID

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (INDEPENDENT DEVELOPMENT TRUST (IDT))**

BID NUMBER:	IDTFS-PANEL-2024-2027	CLOSING DATE	02 August 2024	CLOSING TIME:	11:00am
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DESCRIPTION **APPOINTMENT OF A PANEL OF PROFESSIONAL SERVICE PROVIDERS FOR THREE (3) YEARS TO PROVIDE PROFESSIONAL SERVICES TO THE IDT FREE STATE**

**BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

**INDEPENDENT DEVELOPMENT TRUST**

**46 2ND AVE, WESTDENE**

**BLOEMFONTEIN**

**9300**

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO**

**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

CONTACT PERSON	David Motsatse	CONTACT PERSON	Obakeng Marwane
TELEPHONE NUMBER	051 430 1381	TELEPHONE NUMBER	051 430 1381
FACSIMILE NUMBER	N/A	FACSIMILE NUMBER	N/A
E-MAIL ADDRESS	fstenders@idt.org.za	E-MAIL ADDRESS	fstenders@idt.org.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:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA

**SBD 6.1 REQUIREMENT MUST BE COMPLIED TO CLAIM POINTS ON SPECIFIC GOALS**

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]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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**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 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, 2022, 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](http://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 PIN 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:

.....

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

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

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

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### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

*(delete whichever is not applicable for this tender).*

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

b) 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

- (a) Price; and
- (b) Specific Goals.

#### 1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS	
PRICE	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black	2	4
Total points for Price and SPECIFIC GOALS	100	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2. DEFINITIONS

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

### 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

#### 3.1. POINTS AWARDED FOR PRICE

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

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

80/20	or	90/10
$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$	or	$P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{min}$  = Price of lowest acceptable tender

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

##### 3.2.1. POINTS AWARDED FOR PRICE

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

80/20	or	90/10
$P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$	or	$P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{max}$  = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black	2	4		

### Source Documents to be submitted with the Bid or RFQ

- \*CIPC Document (Company Registration Document will be required for verification (CIPC DOC))
- \*Woman (Originally Certified ID Document)
- \*Youth (Originally Certified ID Document)
- \*People with Disability (Letter from the Dr. Confirming the Disability)
- \*Black Ownership (Originally Certified ID Document)

### DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

..... <b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	..... .....

## 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 interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

2.2. Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1. If so, furnish particulars:

.....  
 .....

2.3. Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....  
 .....

---

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



### 3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM

INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT

SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

..... Signature	..... Date
..... Position	..... Name of bid der

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<sup>2</sup> 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.

**DECLARATION FOR PSPs OPERATING OUTSIDE THE FREE STATE PROVINCE  
(To be completed by bidder)**

**THIS IS TO CERTIFY THAT I (name of bidder/authorised representative)**

.....

**WHO REPRESENTS (state name of bidder)**

.....

**I AM AWARE OF THE CONTENTS OF THE DOCUMENT/ BID AND THEREFORE DECLARE THAT I SHALL SET UP SATELLITE OFFICES IN THE FREE STATE PROVINCE IN THE EVENT OF BEING AWARDED WORKS THAT ARE OF THE CONSTRUCTION WORK TO THE VALUE OF R20 MILLION OR MORE.**

.....

**SIGNATURE OF BIDDER OR AUTHORISED REPRESENTATIVE**

**DATE:.....**

## EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his/her performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Client Reference Scorecards" will be completed by each of the respective Clients for the projects listed in the "Relevant Experience" returnable schedule. Incomplete, Unsigned and Un-stamped forms by the client will score zero points.

The following are to be **completed by the Client**

**PROJECT 1:**

**Name of Project:**.....

**Name of Firm/Bidder:**.....

**Client/Client Department:** .....

**Contract Amount:**.....

**Contract Duration:** .....

**Actual Contract Duration:** .....

Description / Performance	Poor (0)	Fair (1)	Good (2)	Excellent (3.34)
Cost management				
Performance and Technical experience of resources				
Timeous co-operation during the contract				
Quality of service				
Timeous compilation of final account/as-built / Close out				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

--

**Name of Client Representative:** .....

**Designation:** .....

**Telephone:** .....

**Client Signature:** .....

**Date:** .....

Stamp

## EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his/her performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Client Reference Scorecards" will be completed by each of the respective Clients for the projects listed in the "Relevant Experience" returnable schedule. Incomplete, Unsigned and Un-stamped forms by the client will score zero points.

The following are to be **completed by the Client**

**PROJECT 2:**

**Name of Project:**.....

**Name of Firm/Bidder:**.....

**Client/Client Department:** .....

**Contract Amount:**.....

**Contract Duration:** .....

**Actual Contract Duration:** .....

Description / Performance	Poor (0)	Fair (1)	Good (2)	Excellent (3.33)
Cost management				
Performance and Technical experience of resources				
Timeous co-operation during the contract				
Quality of service				
Timeous compilation of final account/as-built / Close out				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

--

**Name of Client Representative:** .....

**Designation:** .....

**Telephone:** .....

**Client Signature:** .....

**Date:** .....

Stamp

## EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his/her performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Client Reference Scorecards" will be completed by each of the respective Clients for the projects listed in the "Relevant Experience" returnable schedule. Incomplete, Unsigned and Un-stamped forms by the client will score zero points.

The following are to be **completed by the Client**

**PROJECT 3:**

**Name of Project:**.....

**Name of Firm/Bidder:**.....

**Client/Client Department:** .....

**Contract Amount:**.....

**Contract Duration:** .....

**Actual Contract Duration:** .....

Description / Performance	Poor (0)	Fair (1)	Good (2)	Excellent (3.33)
Cost management				
Performance and Technical experience of resources				
Timeous co-operation during the contract				
Quality of service				
Timeous compilation of final account/as-built / Close out				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

--

**Name of Client Representative:** .....

**Designation:** .....

**Telephone:** .....

**Client Signature:** .....

**Date:** .....

Stamp

## EVALUATION SCHEDULE: CLIENT REFERENCES (FOR OHS ONLY)

The Tenderer shall provide details of his/her performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Client Reference Scorecards" will be completed by each of the respective Clients for the projects listed in the "Relevant Experience" returnable schedule. Incomplete, Unsigned and Un-stamped forms by the client will score zero points.

The following are to be **completed by the Client**

**PROJECT 1:**

**Name of Project:** .....

**Name of Firm/Bidder:** .....

**Client/Client Department:** .....

**Contract Amount:** .....

**Contract Duration:** .....

**Actual Contract Duration:** .....

Description / Performance	Poor (0)	Fair (1)	Good (2)	Excellent (3.34)
Capability to design, implement and manage Health & Safety requirements				
Performance and Technical experience of resources				
Timeous co-operation during the contract				
Quality of service				
Timeous compilation of final account/as-built / Close out				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

--

**Name of Client Representative:** .....

**Designation:** .....

**Telephone:** .....

**Client Signature:** .....

**Date:** .....

Stamp

## EVALUATION SCHEDULE: CLIENT REFERENCES (FOR OHS ONLY)

The Tenderer shall provide details of his/her performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Incomplete, Unsigned and Un-stamped forms by the client will score zero points.

The following are to be **completed by the Client**

**PROJECT 2:**

**Name of Project:** .....

**Name of Firm/Bidder:** .....

**Client/Client Department:** .....

**Contract Amount:** .....

**Contract Duration:** .....

**Actual Contract Duration:** .....

Description / Performance	Poor (0)	Fair (1)	Good (2)	Excellent (3.33)
Capability to design, implement and manage Health & Safety requirements				
Performance and Technical experience of resources				
Timeous co-operation during the contract				
Quality of service				
Timeous compilation of final account/as-built / Close out				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

**Name of Client Representative:** .....

**Designation:** .....

**Telephone:** .....

**Client Signature:** .....

**Date:** .....

Stamp

## EVALUATION SCHEDULE: CLIENT REFERENCES (FOR OHS ONLY)

The Tenderer shall provide details of his/her performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Incomplete, Unsigned and Un-stamped forms by the client will score zero points.

The following are to be **completed by the Client**

**PROJECT 3:**

**Name of Project:** .....

**Name of Firm/Bidder:** .....

**Client/Client Department:** .....

**Contract Amount:** .....

**Contract Duration:** .....

**Actual Contract Duration:** .....

Description / Performance	Poor (0)	Fair (1)	Good (2)	Excellent (3.33)
Capability to design, implement and manage Health & Safety requirements				
Performance and Technical experience of resources				
Timeous co-operation during the contract				
Quality of service				
Timeous compilation of final account/as-built / Close out				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

**Name of Client Representative:** .....

**Designation:** .....

**Telephone:** .....

**Client Signature:** .....

**Date:** .....

Stamp



## Returnable Documents

List of returnable documents are for ensuring that everything the employer requires a tenderer to submit with his tender is included in, or returned with, his tender submission. Tick below if returnable document is attached or completed properly.

#	LIST OF RETURNABLE DOCUMENTS	TICK IF ATTACHED
1	Detailed full CIPC certificate or other authentic proof of company ownership documents	
2	Professional Registration of the Director/s	
3	Certified ID Copies of Director/s (certification not older three (3) months from bid closing date)	
4	Proof of company shareholding	
5	Proof of CSD registration	
6	Valid Vat Certificate (If Applicable)	
7	Tax Clearance Certificate with PIN	
8	Copy of a Valid Letter of Good standing with Compensation For Occupational And Injuries Diseases Act (COIDA) Registration Certificate	
9	Joint Venture Agreement Between Parties (If Applicable)	
10	Proof of indemnity insurance	
11	SBD Forms (SBD 1; 4; 6.1)	
12	Certificate of Authority for Signatory	
13	Bank Account Confirmation Letter	
14	Project Experience	
15	Letters of Appointment, and Relevant Completion Certificates (Practical Completion, Work Completion & Final Completion)	
16	Client References	
17	Key Personnel (CV'S; Certified Qualification & Professional Registration)	
18	Record of Addenda to the tender documents if applicable	
19	Organogram	

