

SOUTH AFRICAN LOCAL
GOVERNMENT ASSOCIATION

SALGA

Inspiring service delivery

THE SOUTH AFRICAN LOCAL GOVERNMENT ASSOCIATION (SALGA) HEREBY REQUEST FOR PROPOSALS FOR A TRAINING SERVICE PROVIDER/IMPLEMENTATION CONSULTANT TO PROVIDE IMPLEMENTATION SUPPORT FOR DELIVERY OF THE MUNICIPAL FINANCE TRAINING PROGRAMMES FOR MUNICIPALITIES ON BEHALF OF SALGA

BID NO. SALGA 12/2023

Closing date and time: 20 October 2023 at 11:00

Bid Validity Period: 120 days

TENDER BOX ADDRESS:

Menlyn Corporate Park

1st Floor

175 Corobay Avenue

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1. INTRODUCTION

The South African Local Government Association (SALGA) is a public entity established by the Organised Local Government Act (Act 52 of 1997) to assist in the comprehensive transformation of local government in South Africa. SALGA is managed within the framework of the Public Finance Management Act (Act 1 of 1999) and is listed as a schedule 3A public entity. Its main objectives are to:

- Represent, promote and protect the interests of local government;
- Transform local government to enable it to fulfil its developmental role;
- Enhance the role and status of its members as provincial representatives and consultative bodies of local government;
- Enhance the role and status of municipalities;
- Be recognised by national and provincial governments to be the representative and consultative body in respect of all matters concerning local government and to make representations to both provincial and national governments in respect of any matter concerning local government;
- Ensure the full participation of women in organised local government;
- Be the National Employers' Association representing all municipal members and, by agreement, associate members.

2. SALGA MANDATE

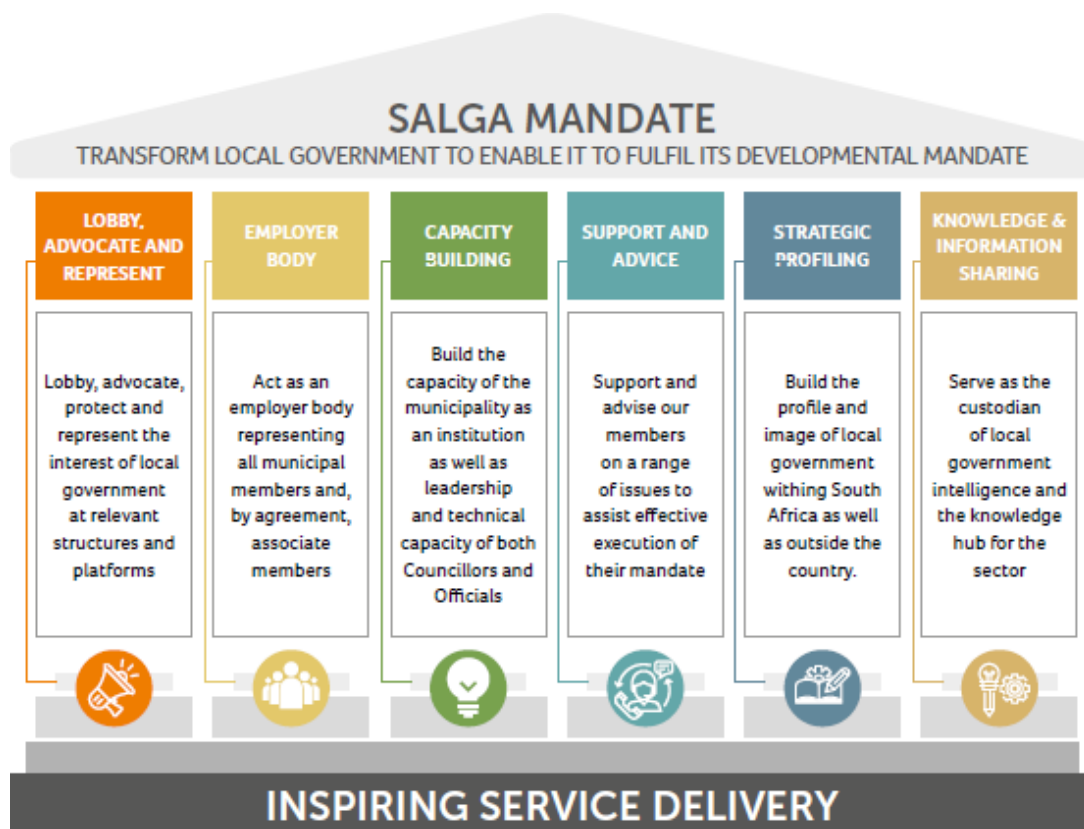
Developmental Local Government is an essential component of the machinery of government. In accordance with its constitutional mandate, SALGA is obliged to transform the local government sector to one that has the required capacity to make a meaningful contribution to poverty alleviation, economic development and all socio-economic opportunities that the state has geared itself to provide for its people. SALGA also serves as the representative voice of all 257 municipalities in the country. For the past 20 years, since its establishment, SALGA has endeavoured to bring focus to its mandate of supporting local government transformation in a complex environment, characterised by a highly diverse and diffuse membership-base of municipalities. In terms of its amended Constitution, SALGA is a unitary body that consists of a national association and nine provincial offices. Its mandate rests on six primary pillars:

- (1) **Representation, Advocacy and Lobbying** refers to representing the interests of members in legislatures and other policy making and oversight structures. It also refers to engaging with various stakeholders, public debates etc. in the interest of Local Government.
- (2) **Employer Body** refers to being an effective employer representative for members. Employer representation is carried out through collective bargaining (in terms of the Labour Relations Act) in various structures including but not limited to those established in the South African Local Government Bargaining Council.
- (3) **Capacity Building** refers to facilitating capacity building initiatives through among others; representing member interests in the Local Government Sector Education

Authority (LGSETA). SALGA strives to facilitate a coherent, well-co-ordinated capacity building programme for municipal councillors and officials.

- (4) **Support and Advice** refers to the provision of tools and services that enable municipalities to understand and interpret trends, policies and legislation affecting Local Government and to implement the said policies and plans
- (5) **Strategic Profiling** of Local Government refers to enhancing the profile and image of local government as an important and credible agent for the delivery of services. Profiling focuses within South Africa, the African continent and the rest of the world.
- (6) **Knowledge and Information Sharing** refers to building and sharing a comprehensive hub of Local Government knowledge and intelligence that will enable informed delivery of other SALGA mandates. The knowledge hub is also a useful reference point for all who seek Local Government information.

Diagrammatically the mandate is depicted as follows:



3. BACKGROUND

Post the 1 November 2021 elections, a total of 9473 councillors were elected with 5632 being first time councillors and a total 3841 councillors were returning. Below is the provincial breakdown and profiles of the councillors:

BREAKDOWN OF 2021 NEWLY ELECTED COUNCILLORS				GENDER BREAKDOWN OF 2021 NEWLY ELECTED COUNCILLORS						
Province	Ward Councillors	PR Councillors	Total	Province	Female Ward Councillors	Male Ward Concillors	Total	Female PR Concillors	Male PR Concillors	Total
Eastern Cape	710	796	1506	Eastern Cape	243	467	710	388	408	796
Free State	319	357	676	Free State	70	249	319	179	176	355
Gauteng	529	564	1093	Gauteng	170	359	529	214	346	560
KwaZulu-Natal	900	1007	1907	KwaZulu-Natal	131	769	900	472	532	1004
Limpopo	568	658	1226	Limpopo	151	417	568	302	349	561
Mpumalanga	400	462	862	Mpumalanga	104	296	400	231	230	461
North West	403	469	872	North West	102	301	403	209	260	469
Northern Cape	232	255	487	Northern Cape	86	146	232	86	146	232
Western Cape	406	438	844	Western Cape	147	259	406	162	276	438
Grand Total	4467	5006	9473	Grand Total	1204	3263	4467	2243	2723	4876
Source: Independent Electoral Commission (IEC) 09 November 2021										

By the end of March 2022, a total of 7511 councillors and 139 traditional leaders were trained as outlined below:

Provinces	Total Number of Councillors To Be Trained as PER IEC	Total Municipalities	Total Municipalities Supported	Total Number Sessions	Actual Number of Cllrs (Head Count)	Total Number of Cllrs Missed ICIP Training	# Total Numbers Traditional Leaders Trained
Eastern Cape	1506	39	39	32	1180	326	6
Free State	676	23	23	19	485	191	13
Gauteng	1093	11	11	48	946	147	0
KwaZulu Natal	1907	54	54	47	1276	631	14
Limpopo	1226	27	27	86	1226	0	100
Mpumalanga	862	20	20	16	773	89	0
Northern Cape	487	31	31	15	445	42	6
North-West	872	22	22	28	648	224	0
Western Cape	844	30	30	20	532	312	0
Total	9473	257	257	282	7511	1962	139

By end of December 2021 all the Municipal Councils had been constituted as the 6th LG Administration which term of office will run from 2021-2026. In addition, SALGA has also formulated a strategy covering the period 2022-27 which outlines mandate of capacity building:

Outcome 1: Build capacity

- **Strategic Outcome 2: Good Governance & Resilient Municipal Institutions,** addresses **Outcome statement:** Investing in good governance and modernisation of government approaches, strengthening community interface mechanisms, sound labour relations and Professionalisation.

4. ABOUT THE SALGA CENTRE FOR LEADERSHIP AND GOVERNANCE (SCLG)

SALGA has an established history and implementation footprint in support of municipal capacity building. It has done this across the various dimensions of individual, institutional, as well as sectoral capacity building. This is a very dynamic and evolving area of SALGA's work which continuously gets reviewed to respond to the fast changing and complex environment of municipal governance and service delivery. This is particularly so given that the current reality of local government is that of a system which is under severe strain and on a downward performance trajectory.

As capacity building is inherently a multi-dimensional series of continuous undertakings involving SALGA working together with a range of stakeholders such as Higher Education Institutions, Research Institutions, Professional Bodies to name but a few, the capacity building programmes delivered under the auspices of the SALGA Centre for Leadership and Governance (SCLG) as a learning and development intervention should be seen against this particular context.

The SCLG builds capacity through core programmes, continuous development programmes and products and services as outlined below:

CORE & CONTINUOUS PROGRAMMES	PRODUCTS AND SERVICES
<ul style="list-style-type: none"> • Integrated Councillor Induction – Generic Phase 1 • Integrated Councillor Induction Credit Bearing Phase 2 • Integrated Councillor Executive Development Programme • Portfolio-Based Induction • Multi-stream Municipal Governance Training Programme • Local Government/Women Leadership Development Training Programme • Senior Managers Development Training Programme • Multi-stream Performance Management Training Programme • TASK Job Evaluation System Training Programme • Local Labour Forum Training for employer Representatives Training Programme • Media and Stakeholder Engagement Training Programme • Leadership in Municipal Governance Training Programme • Occupational Health & Safety Training Programme • Leadership Impact and Innovation Training Programme 	<ul style="list-style-type: none"> • Municipal Strategic Positions Competency Assessments • Personal Credentials Validations and Integrity Vetting • HRM Maturity Profiling Tool • Good Governance Maturity Index • Municipal Capability Assessment Index • Leadership Village& • Communities of Practice/Thought Leaders/ Accredited Facilitators • Councillor Interactive Self-Assessment Tool • E-Learning Services • Knowledge Products • Annual Local Government Seminar Publications • 9th In.KNOW.vation Publication • Developmental Local Government Series: Municipal Perspectives on Development, Governance and Service Delivery • SALGA New Generation Research Strategy (2022-2027) • Local Government Knowledge Management Toolkit • SALGA Local Government Innovation Toolkit • Local Government Change Management Toolkit • Human Capital Management Blueprint
CONTINUOUS PROFESSIONAL DEVELOPMENT PROGRAMMES	
<ul style="list-style-type: none"> • Annual Local Government Labour Law Seminar • Annual Local Government Governance & Performance Management Seminar • Annual Local Government Talent Management Seminar • Local Government Professionalisation Indaba • Capability Optimisation Masterclass 	

SCLG programmes focus on enhancing leadership and governance capabilities to drive professionalism and excellence in a dynamic and complex municipal environment.

5. SCLG STRATEGIC BUSINESS OBJECTIVES

SALGA has clear strategic objectives relative to the SCLG operation. These include:

- a) Framing leadership development as a large-scale local government change and transformation.
- b) Institutionalising an integrated strategic leadership talent management process.
- c) Formulating a future-fit leadership stance, appropriate to local government needs.
- d) Crafting a context relevant, comprehensive, systemic leadership competency model for local government.
- e) Adopting an action learning and reflection philosophy to enhance learning and development transfer.
- f) Building a high impact, leadership development delivery architecture.
- g) Using a set of blended learning and development interventions.
- h) Constructing an efficient and effective learning and development organisational design delivery.
- i) Conducting an on-going assessment of benefits realisation.

Post the 2021 the local government elections, SALGA coordinated and delivered the Integrated Councillor Induction Programme (ICIP) in collaboration with COGTA; National Treasury, the Auditor General, the National School of Government and LGSETA and a range of other stakeholders within and outside of government. The ICIP is anchored on the 5 pillars of the Back to Basics approach, multi-disciplinary in its implementation approach, aspires to respond to the National Capacity Building Framework (NCBF) imperatives and represents the foundational learning layer of a Councillor Development Macro Learning Pathway for Councillor capacity building that is set out for the full duration of the term of Municipal Councils (2021-2026).

6. SCOPE OF WORK

SALGA intends to appoint suitably qualified and competent training service provider/implementation consultant to assist with the following services:

6.1 PROVIDE TECHNICAL SUPPORT IN THE REVIEW OF THE EXISTING TRAINING MATERIAL OF PROGRAMMES IN LINE WITH CURRENT LOCAL GOVERNMENT LEGISLATION, REGULATIONS AND POLICIES:

- Review the current legislative and regulatory environment affecting local government;
- Engage relevant stakeholders to solicit their inputs during the reviews and final draft.
- The legislative and regulatory environment that must be reviewed must relate to the following areas of relevance for SCLG programmes:

- a) Asset Management Training - **2000 Beneficiaries (Municipal Councillors & Officials);**
- b) Audit Committee and Review & Compilation Annual Financial Statements(AFS) Training - **1000 Beneficiaries (Municipal Councillors & Officials); and**
- c) Municipal Finance Programme (Records Management Training, Project Finance Training and Reconciliation of billing system with General Valuation Roll Training - **2000 Beneficiaries (Municipal Councillors & Official)**

DESIGN, DEVELOPMENT AND PACKAGING OF LEARNING MATERIAL

6.1.1 Produce the signed-off final learning manuals.

6.1.2 Package standardised Learner Guides, Facilitator Guides, Powerpoint Presentations and the development of project related templates for programme implementation, monitoring and evaluation for the following programmes:

- a) Asset Management Training - 2000 Beneficiaries (Municipal Councillors & Officials);
- b) Audit Committee and Review & Compilation Annual Financial Statements (AFS) Training - 1000 Beneficiaries (Municipal Councillors & Officials); and
- c) Municipal Finance Programme (Reconciliation of billing system with General Valuation Roll Training

6.1.3 The service provider must develop the training delivery model.

6.1.4 The delivery model must clearly articulate a *framework* that encapsulates a blended learning approach, including:

6.1.5 Classroom-based / Instructor-led training;

6.1.6 The delivery model must outline and/or illustrate the solution's architecture in line with the above framework.

6.1.7 The delivery model must demonstrate the overall implementation methodology to deliver and rollout the solution with all its required critical deliverables, governance and risk requirements, data security and compliance component, and project quality control mechanisms in adherence to POPI Act and other related legislation.

6.2 PROVIDE PROJECT MANAGEMENT SUPPORT IN THE IMPLEMENTATION OF CAPACITY BUILDING PROGRAMMES

6.2.1 The development/administration of the train the trainer programme for the facilitator cohort will prepare them for their facilitation role which will be discharged during the rollout of the programmes.

6.2.2 Provide project management services to SALGA for the roll out of the non- accredited programmes, management of facilitators whilst ensuring that these programmes gain insight and develops capacity to manage the project.

6.2.3 Develop project related templates for programme implementation, monitoring and evaluation across the project value chain.

6.2.4 Issuance of certificates of completion to the delegates.

6.2.5 Submission of a final project close out report.

The programmes to be implemented for Municipal Councillors and Officials namely:

- Asset Management Training;
- Audit Committee and Review & Compilation of Annual Financial Statements (AFS) Training; and
- Municipal Finance Programme (Records Management Training, Project Finance Training and Reconciliation of billing system with General Valuation Roll Training).

7. SPECIFICATIONS AND REQUIREMENTS

The appointed bidder will be expected to demonstrate technical ability and capacity to undertake an assignment of this complexity. The successful training service provider must fulfil the following requirements:

- a) Shortlisted bidders may be required to make a presentation to SALGA on their value proposition.
- a) The bidder must have experience in curriculum development for contact and blended training programmes.
- b) Demonstrate excellent research, business plan development and writing skills.
- c) Demonstrate experience in the roll out of formal training programmes and certification of learners.
- d) The bidder must have a cohort of facilitators with experience and knowledge of the South African local government Finance and Governance environment.
- e) The bidder must have sound knowledge of the local government sector and the capacity building landscape coupled to legislation governing skills development e.g. NSDSIII, National Qualifications Framework, Qualifications Authority Act, Municipal Finance Management Act & Skills Development Act etc.) in the local government and/or comparable sectors in the past 3 years.
- f) The Service Provider must have successfully run a non-accredited blended (contact and eLearning) training in the local government sector in the past 3 years.
- g) Demonstrate a detailed project management plan that outlines all the elements of the programme from development and rollout through to certification.
- h) Provide a detailed project budget breakdown for all critical project deliverables.
- i) Demonstrate an administrative capacity, including office space, equipment, personnel logistics and management that is commensurate to the magnitude of this project. To this end SALGA reserves the right to conduct a site inspection of the bidder's premises and/or claimed delivery milestones to validate proof of concept.
- j) Must possess competency in IT skills, dashboard reporting and development of reporting, monitoring and evaluation of the project.
- k) The service provider/implementation consultant are expected to provide SALGA with a project plan that clearly outlines the relevant activities, taking into consideration the anticipated deadlines that will apply.

8. REPORTING

Copies of all products related to this assignment should be submitted in electronic format (Microsoft Word) via email to the SALGA Project Manager. The service provider(s) is expected to deliver on the milestones within the agreed times.

9. APPOINTMENT, COMMENCEMENT AND DURATION

The appointed service provider is anticipated to commence the work upon appointment for a duration of **16 months**.

10. DESCRIPTION AND EXTENT OF WORK (PROJECT MANAGEMENT)

10.1 Performing of Assignments

Assignments are to be performed in accordance with the industry/profession standards as well as the terms of reference. All reports will be reviewed by the relevant Project Manager and oversight governance structures representing the organisation.

All working papers and reports and documents will become the property of SALGA.

The successful bidder shall work with the SALGA on the planning of various phases of the service activities and must be prepared to regularly report the progress to the relevant Project Manager.

10.2 Timing of Assignments

The performance of this assignment shall be in accordance with the approved plan by the Project Committee. The final responsibility of approving the scope and extent of the work resides with the relevant Project Manager and Governance structure.

10.3 Quality Assurance Reviews of The Work

The bidder shall ensure that all work conforms to the required ETQA and SETA quality assurance standards.

10.4 Monitoring Progress of Assignments

On a mutually agreed basis, the bidder shall meet with the Project Manager to report progress of the work, and at the Project Committee meetings.

10.5 Payments

SALGA undertakes to pay out within a reasonable time period all valid claims for work done to its satisfaction upon presentation of a substantiated claim. No payment will be made on outstanding information not submitted by the bidder.

The parties shall, upon appointment of the bidder, sign a service level agreement to govern their business relationship.

Acceptance of any bid does not mean that work on an uninterrupted basis is guaranteed for the duration of the contract.

10.6 Expenditure Incurred by the Bidder

The SALGA will not be held responsible for any costs incurred by the bidder in the preparation and submission of the bid..

10.7 Objectives

SALGA's objective in the call for proposals is to select and appoint a competent training service provider/implementation consultant to provide implementation support for delivery of the Municipal Finance Training Programmes for Municipalities on behalf of SALGA.

10.8 Terms of Contract

The terms of the contract shall be regulated by the Service Level Agreement (SLA) to be concluded with the winning bidder. It is anticipated that the term of the contract shall be for the duration of the assignment and shall expire upon fulfilment of the scope of work. The contract may be extended by mutual agreement. Thirty (30) days written notice must be given if either party wishes to terminate the agreement prior to the contract's expiry date.

11. EVALUATION

For the purpose of comparison and to ensure a meaningful evaluation, bidders must submit detailed information in substantiation of compliance with the evaluation criteria mentioned below. The bidder/s will be evaluated in five phases as stated below:

Phase 1	Pre-Compliance check on Mandatory requirements
Phase 2	Technical Functionality
Phase 3	Price & B-BBEE status level of contribution

Phase 1: Mandatory Requirements for the bidder

- a. The prospective bidder must be registered on Central Supplier Database (CSD) before submitting bids.
- b. The prospective bidder must be registered with a SETA and any other Education Training Quality Assurance (ETQA) Body

NB: Failure to adhere to the Mandatory requirements above will automatically disqualify your bid/s and will not proceed to Phase 2.

Phase 2: Technical Functionality

NB: Technical functionality will be done only on bidders that comply with the minimum technical mandatory requirements.

Functionality Points Breakdown:

SCALE LEVEL DESCRIPTIONS	RATING
No relevant response or information is given to enable the evaluation	0
<u>Very poor</u> response based on the expected standard	1
<u>Poor</u> response based on the expected standard	2
<u>Average</u> response based on the expected standard	3
<u>Good</u> response based on the expected standard	4
<u>Excellent</u> response based on the expected standard	5

CRITERIA FOR FUNCTIONALITY	BREAKDOWN OF POINTS	WEIGHTS
Understanding of the brief as well as submission of supporting documentation (Written track record in curriculum development and programme implementation).	<p>0= No relevant response and non-submission of supporting documentation</p> <p>1= Very poor response in the understanding of the scope of work and non-submission of supporting documentation</p> <p>2= Poor response in the understanding of the scope of work and non-submission of supporting documentation</p> <p>3= Average response in the understanding of key deliverables and submission of supporting documentation</p> <p>4= Good response in the understanding of the scope of work and submission of supporting documentation</p> <p>5= Excellent response demonstrating understanding of the scope of work and submission of all documentation as per terms of reference.</p>	25
Approach and methodology (to includes project plan to cover scope of work)	<p>0= no submission of project plan</p> <p>1= very poor response in the submitted project plan, not covering the scope of work</p> <p>2= Poor response in the submitted project plan and the methodology approach is not covering the scope of work</p> <p>3= Average response in the submitted project plan and the methodology approach is in line with the scope of work</p> <p>4= Good response in the submitted project plan and the methodology approach is in line with the scope of work.</p> <p>5= Excellent response in the submitted project plan & the methodology approach is in line with the scope of work (that outlines the details of all the elements of framework and roadmap development to completion)</p>	30

A proven track record for managing projects of a comparative size and nature accompanied by minimum 3 written contactable references	<u>Reference letters:</u> 0= none; 1=one letter; 2= two letters, 3= three letters, 4= four letters 5= five letters	20
Project management and facilitation capacity relevant to training environment	0= No relevant response-no CVs and qualifications were provided and bidder lacks capacity to deliver the project 1=Very Poor response - project and facilitation teams 'CVs and qualifications provided demonstrated very poor experience and capacity to deliver this project 2=Poor response- project and facilitation teams 'CVs and qualifications provided demonstrated poor experience and capacity to deliver this project	25
	3= Average response- project and facilitation teams 'CVs and qualifications provided demonstrated average experience and capacity to deliver this project 4= Good response- project and facilitation teams 'CVs and qualifications provided demonstrated minimum experience and capacity to deliver this project. 5= Excellent response -project and facilitation teams 'CVs and qualifications provided demonstrate excellent experience and capacity to deliver this project	
Minimum Threshold		70
Total for functionality		100

NB: Bidders who score 70 (average) points and above will be considered in phase 3 of the evaluation (**Price and Specific Goals**).

Phase 3: Price and Specific Goals

The 80/20 points system will be used when evaluating this Request for Proposal.

The remaining 20 points will be allocated 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:

The maximum points for this tender are allocated as follows:

B-BBEE Status Level of Contributor	Number of points (80/20 system)	Number of points (90/10 system)
1	10	5
2	9	4
3	7	3
4	6	2
5	4	1
6	3	0
7	2	0
8	1	0
Specific Goals		
SMME's	4	4
100% Black Women owned	3	3
100 % Youth	3	3
Total Points	20	10

Phase 3 of evaluation will include the sum of the two criteria below:

CRITERIA	WEIGHT
Price	80
B-BBEE status level of contribution	10
Specific Goals	10
TOTAL	100

Bidders must submit proof of their B-BBEE status level of contributor.

A bidder failing to submit proof of B-BBEE status level of contribution or is a non-compliant contributor to B-BBEE may not be disqualified but may only score points out of 80 for price, and score 0 points out of 20 for B-BBEE.

12. SPECIAL CONDITIONS

The following should be noted by interested parties:

- SALGA may at its discretion vary this instruction to include more scope/work or to exclude work/service areas. In the case of the latter, the bidder shall not be entitled to claim for any work not required and may engage SALGA on the pricing of the additional work/ service proposed.
- All copyright and intellectual property rights that may result because of the work to be performed shall reside with SALGA and the service provider shall be required to sign an agreement of confidentiality.
- SALGA may dictate the framework in which documents (policies, plans, reports, etc.) shall be submitted; however, the service provider should be able to submit a proposal on the layout of his/her choice for consideration by SALGA.
- SALGAs (general conditions of the bid, contract, and order) shall apply to this bid. The service provider shall be required to conclude and sign a Service Level Agreement (SLA) after the appointment.
- SALGA reserves the right not to award the bid to any bidder at its discretion.
- SALGA reserves the right to make a selection solely on the information received in the bids or to negotiate further with one or more bidder/s;
- To contact any bidder during the evaluation period, to clarify information only, without informing any other bidder.
- The bidder accepts that SALGA will have a right to contract with any other service provider for the provision of services not covered by this specification.
- Government procedures will be followed in appointing the prospective bidder.
- In line with the Legislative Framework, SALGA is not obliged to continue, renew, or extend any existing contracts of the bidder, unless it deems otherwise.)
- SALGA will not award the bid to any prospective bidder who has not registered with the Central Database Supplier as regulated by the National Treasury Department.

13. CONDITIONS OF BID (FAILURE TO MEET ANY OF THE REQUIREMENTS BELOW MAY RENDER YOUR BID PROPOSAL NON-RESPONSIVE)

- Indication of approach to the project – including but not limited to a brief overview of what systems are used by organisations with similar purpose and goals to SALGA.
- A project plan reflecting the scheduling, organisation and resource mobilisation that the programme would entail.
- A detailed budget.
- Indication of the experience of the service provider in the development learning material that may be used in a blended learning environment with delivery via a standard browser interface to desktop computers, laptops and mobile devices.
- The requirement for content of the project proposal section below outlines the information that must be included in bid offers. Failure to provide all or part of the information may result in your bid being excluded from the evaluation process.
- A contract will be signed with the appointed Service Provider.
- The Service Provider will be required to sign confidentiality and indemnity agreements with SALGA.
- SALGA reserves the right to appoint more than one bidder for the implementation and attainment of the deliverables should it be determined, that comparative advantages may be leveraged by doing so. Bidders are therefore requested to submit activity-based time and budget costing.
- SALGA may at its own discretion vary an instruction to include more work.
- Failure to comply with any condition of this request for a proposal will invalidate respective tender proposal.
- In the event that any conflict of interest is discovered during the assignment, SALGA reserves the right to summarily cancel the agreement and demand that all the information, documents and property of SALGA be returned forthwith.
- SALGA reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its project proposal.
- Bidders shall not make available or disclose details pertaining to their project proposal with anyone not specifically involved, unless authorized to do so by SALGA.
- Bidders shall not issue any press release, social media or other public announcement pertaining to the details of their project without the prior written approval of SALGA.
- Bidders are required to declare any conflict of interest they may have in the transaction for which the bid is submitted or any potential conflict of interest. SALGA reserves the right not to consider further any bid where such a conflict of interest exists or where such potential conflict of interest may arise.
- The bid offers and proposals should be valid and open for acceptance by SALGA for a period of 120 days from the date of submission.
- Bidders are advised that submission of a project proposal gives rise to no contractual obligations on the part of SALGA.
- Disputes that may arise between SALGA and a bidder must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- In addition to adherence to the specific terms and conditions of proposals, provided in this document, the bidder shall be bound by the provisions of the General Conditions of Contract attached hereto, an originally signed copy of which must be submitted together with all other bid documentation.
- All returnable bid documents must be completed in full and submitted together with bidder's proposal.

- SALGA will not be liable for costs incurred during the site visits or any other cost related to the submission of the bid.

14. INSTRUCTION TO BIDDERS

14.1 GENERAL INSTRUCTIONS

This document constitutes a Request for Proposal (RFP), which specifies SALGA's **Request for Proposals for a Training Service Provider/Implementation Consultant to provide Implementation Support for delivery of the Municipal Finance Training Programmes for Municipalities on behalf of SALGA.** The information contained herein provides a format to facilitate the bidder's response format must be followed closely to help maintain the decision-making timetable. Responses must be presented in the same order as the requirements appear, section by section, and numbered accordingly, with acknowledgement of all clauses. All pricing information should be fully disclosed with all charges clearly defined, i.e., a per-unit fee based on activity. Please feel free to address any other potential services not specifically mentioned in this RFP that may be of benefit to SALGA.

- 14.2** Where Consortia / Joint Ventures / Sub-contractors are involved, each party must be registered on the Central Supplier Database and their tax compliance status will be verified through the Central Supplier Database.

14.3 Questions During the Proposal Process

There will be NO briefing session for this bid, Bidders are encouraged to send their enquiries before the closing date to the email address below.

scm@salga.org.za.

Questions will only be taken up to four working days before the closing date.

Bidders finding apparent discrepancies or omissions in the RFP should notify Bidders may during the bidding period, be advised by Addenda, of any additions, clarifications, deletions, or alterations to these specifications. All such changes should be covered by the bidder's proposal. Information used in the preparation of a proposal from other than this RFP and any written addenda (considered as the proposal documents) will not be considered valid or official.

No further addenda will be issued by SALGA after 12:00 noon, **four business days** before RFP closing without providing an extension of time

14.4 Submission of Proposal

NB: The bid proposal in a sealed opaque envelope shall contain one original hard copy document, clearly marked "original", and four (4) hard copies, clearly marked "Copy" (i.e., three documents to be included in each sealed opaque envelope and a USB flash drive or memory stick with the true copy of the hard copy, and marked: SALGA 12/2023 Request for Proposals for a Training Service Provider/Implementation Consultant to provide Implementation Support for delivery of the Municipal Finance Training Programmes for Municipalities on behalf of SALGA.."

Senior Buyer: SCM – Lucky Nkomo

Physical address:

*South African Local Government
Association (SALGA) Menlyn Corporate
Park*

Block B 175 Corobay Avenue

*Corner Garsfontein &
Corobay Avenue Waterkloof
Glen ext. 11*

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Bid Proposals must be deposited in the Bid Box situated near the reception desk on the first floor, during regular business hours only, up to **20 October 2023 before 11:00 am**. Late submissions will not be accepted.

Bidders remain solely responsible for the method of conveyance of their proposal to the receiving point. Fax transmissions or any other electronic communications are not acceptable.

SALGA will not be responsible for any costs incurred by the bidders associated with the preparation of responses to the RFP.

Proposals received past the time stated above will not be considered and will be returned to the bidder unopened.

All proposals will remain in force and will be irrevocable for **hundred and twenty days** after the proposal closing.

Proposals shall be stipulated sums without escalator clauses or other qualifications.

14.5 Questions During the Proposal Process

There will not be a briefing session for this bid, Bidders are encouraged to send their enquiries before the closing date to the email address below.

scm@salga.org.za.

Questions will only be taken up to four working days before the closing date.

Bidders finding apparent discrepancies or omissions in the RFP should notify Bidders may during the bidding period, be advised by Addenda, of any additions, clarifications, deletions, or alterations to these specifications. All such changes should be covered by the bidder's proposal. Information used in the preparation of a proposal from other than this RFP and any written addenda (considered as the proposal documents) will not be considered valid or official.

No further addenda will be issued by SALGA after 12:00 noon, **four business days** before RFP closing without providing an extension of time.

15. CONTRACT AWARD

SALGA reserves the right to accept any proposal submitted or reject all proposals.

Any proposal submitted, that is not in complete compliance with the requirements of the proposal documents may be accepted or disqualified, at the option of SALGA.

Please outline in your proposal the assistance your institution is prepared to provide in order to meet the estimated contract duration period for the full implementation of the scope of work.

16. TERMINATION OF CONTRACT

SALGA reserves the right to terminate the agreement with 30 days written notice to the winning bidder subject to the following:

- the winning bidder fails to perform in accordance with the specified service requirements as set out in the RFP;
- the winning bidder fails to provide project deliverables as defined under **Section 5** above without written explanation; and
- the winning bidder otherwise violates the provisions of the RFP to a substantial degree.

17. LIABILITY

SALGA will not be held liable for any actions of the winning bidder and/or its employees.

18. IMPORTANT DATES

- **10 October 2023**– Last date/opportunity for questions or to request clarity via email; and
- **20 October 2023** - Bid closing date due at 11:00.

19. FORMS

17.1 Standard Bidding Forms

a. Invitation to Bid

Form SBD 1 - Bidders must complete this document in full.

b. Pricing Schedule

Form SBD 3 - Bidders must complete this document in full.

c. Bidders Disclosure

Form SBD 4 - Bidders must complete this document in full.

d. Preference Points Claim form.

Form SBD 6.1 - Bidders must complete this document in full, special attention. must be given to sections 8 and 9. They must be completed on the original and signed.

Reviewed by the Chairperson : Bid Specification Committee



PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	SALGA 12/2023	CLOSING DATE:	20 OCTOBER 2023	CLOSING TIME:	11:00
DESCRIPTION	REQUEST FOR PROPOSALS: REQUEST FOR PROPOSALS FOR A TRAINING SERVICE PROVIDER/IMPLEMENTATION CONSULTANT TO PROVIDE IMPLEMENTATION SUPPORT FOR DELIVERY OF THE MUNICIPAL FINANCE TRAINING PROGRAMMES FOR MUNICIPALITIES ON BEHALF OF SALGA.				
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO					
CONTACT PERSON			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
TELEPHONE NUMBER			CONTACT PERSON		
FACSIMILE NUMBER			TELEPHONE NUMBER		
E-MAIL ADDRESS			FACSIMILE NUMBER		
			E-MAIL ADDRESS		
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
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[AN UPDATED CSD REPORT MUST BE SUBMITTED IN ORDER TO QUALIFY FOR SPECIFIC GOALS AT PPPFA EVALUATION]					
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]
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, 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 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:

.....

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: BID NO.: SALGA/12/2023

CLOSING TIME 11:00 ON 20 OCTOBER 2023

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

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <u>VALUE ADDED TAX</u>	
1.	The accompanying information must be used for the formulation of proposals.		
2.	Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of VAT for the project.	R.....	
3.	PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)		
4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
	-----	R-----	-----
	-----	R-----	-----
	-----	R-----	-----
	-----	R-----	-----
	-----	R-----	-----
5.	PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT		
	-----	R-----	----- days
	-----	R-----	----- days
	-----	R-----	----- days
	-----	R-----	----- days
5.1	Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.		
	DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY AMOUNT
	----- R.....
	----- R.....
	----- R.....
	----- R.....
		TOTAL: R.....	

Quotatio No.:

Name of Bidder:

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....
TOTAL: R.....			

6. Period required for commencement with project after acceptance of bid
7. Estimated man-days for completion of project
8. Are the rates quoted firm for the full period of contract?
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
-
-
-

Any enquiries regarding bidding procedures may be directed to the –

Lucky Nkomo
SALGA
Menlyn Corporate Park
1st Floor
175 Corobay Avenue
c/o Garsfontein and Corobay Avenue
Waterkloof Glen

Tel: (012) 369-8000
scm@salga.org.za

Or for technical information –

Mr. Thobile Mhlongo
scm@salga.org.za

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 State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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.

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.
- 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

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.

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

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

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

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

1. GENERAL CONDITIONS

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

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

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

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 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:

B-BBEE Status Level of Contributor	Number of points (80/20 system)	Number of points (90/10 system)
1	10	5
2	9	4
3	7	3

4	6	2
5	4	1
6	3	0
7	2	0
8	1	0
Specific Goals		
SMME's	4	4
100% Black Women owned	3	3
100 % Youth	3	3
Total Points	20	10

- 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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

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 tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

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

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
SMME's	4	4		
100% Black Women owned	3	3		
100 % Youth	3	3		

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

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

SURNAME AND NAME:

DATE:

ADDRESS: