



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

REQUEST FOR PRICE QUOTATION

For office use only:

Reference No:	OCCUPATIONAL THERAPIST: OT-CONTR/03-2025
Date RFQ Issued:	15 April 2025

Request for Quotation on behalf of the Department of Trade, Industry and Competition (**the dtic**)

The dtic hereby invites suitable service providers to provide the department with a quotation in accordance with requirements as per Annexure A, or in accordance with the Terms of Reference (Scope of work).

Service Provider Details

To be completed by the service provider:

Name of service provider	
CSD service provider Number	
Contact person	
Email address	
Telephone number	

Enquiry and Closing Details

For office use only:

Contact person	Margaret Mashala
E-mail address	MMashala@thedtic.gov.za
Telephone number	012 394 1845/ 066 282 5758
Closing date and time for quotation	25 April 2025 at 16:00
Quotations are to be e-mailed to the dtic provided email	MMashala@thedtic.gov.za

Terms and Conditions

1. Quotations should be dated and signed preferably on the company's letterhead.
2. Quotations received after the closing date and time will not be considered.
3. Quotations received will be evaluated firstly on pre-compliance evaluation, then on functionality evaluation (**IF APPLICABLE**), and thereafter 80/20 point scoring basis. The 80 points will be for price and 20 points for preferential procurement specific goals.
4. No quotation will be considered from service providers employed by the state.
5. **Quotations should be valid for a minimum period of 120 days from the date the RFQ closed.**
6. All prices quoted must be VAT inclusive, service providers not registered for VAT must indicate this clearly on their quotation. For VAT vendors, if no indication is provided quotations will be evaluated as VAT inclusive.
7. **The attached SBD 1, SBD 4, RFQ with POPIA consent form must be completed in full and submitted together with the quotation.**
8. Bidders who wish to claim for preferential procurement points applicable to this RFQ must ensure that the **SBD 6.1** claim form is completed and accompanied by the relevant proof required. Failure on the part of the bidder to complete table 1 of SBD 6.1, it will be interpreted to mean that preference points for specific goals are not claimed irrespective of the relevant proofs attached.
HDI(Race, Women and People with disabilities)
 - Submit proof of disability (Letter from General Practitioner/specialist with regard to your disability is required to substantiate a claim)
 - Proof of Race and women-attach latest CSD report**Small Medium Micro Enterprises (SMME's)**
 - Sars return indicating annual turnover/ B-BBEE certificate/ CIPC B-BBEE certificate / Sworn Affidavit fully completed as per B-BBEE guide paragraph 17**Local Procurement (Provincial / Municipal)**



the dtic

Department:
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REPUBLIC OF SOUTH AFRICA

- Proof of address (municipal rates/ bank statements/ lease agreement / affidavit or any latest statement not older than three months containing proof of address)
B-BBEE compliance based on Section 10 of the B-BBEE Act (Act 53 of 2003 as amended by Act 46 of 2013)
 - B-BBEE certificate/ CIPC B-BBEE certificate / sworn Affidavit fully completed as per BBBEE guide paragraph 17
9. ***Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ to claim points for specific goals with the RFQ, will be interpreted to mean that preference points for specific goals are not claimed.***
 10. Service providers who wish to render services to **the dtic** must register on CSD and ensure banking details are verified.
 11. All prices quoted **MUST** be firm for the duration of the contract. Where Rate of Exchange is applicable, conditions must be stipulated on the quotation.
 12. All quotations must be strictly in accordance with Annexure A.
 13. **the dtic** reserves the right to appoint more than one service provider as deemed necessary, furthermore the department reserves the right not to appoint.
 14. Price offered by the service provider scoring the highest points must be reasonable and market related

Please note:

EVALUATION CRITERIA

- Quotations will be evaluated based on the 80/20 preference, where 80/20 principle will apply to all procurement with a rand value of up to R50 million (all applicable taxes included)¹. 80 Points will be allocated for price and 20 points will be used for preferential procurement in line with the specific goals.
- Refer to SBD 6.1 form for specific goals
- Contract will be awarded to the bidder who scores the highest total points²
- This RFQ is in line with the PREFERENTIAL PROCUREMENT REGULATION 2022



the dtic - together, growing the economy
the dtic Customer Contact Centre: 0861 843 384
the dtic Website: www.thedtic.gov.za



¹ “all applicable taxes” includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

² “highest total points” equals the point scored for price added to the points for preferential procurement and RDP goals.



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POPIA CONSENT FORM

The Bidder and the proposed team/ individuals proposed by the Bidding entity to perform work in line with the requirements stipulated in this request for quotation(RFQ) document, hereby give their consent to **the dtic** and its Officials involved in the evaluation / recommendation / award / drafting of SLA / verification of submissions, processing of purchase orders and invoices, to process our personal information for all purposes related to this request for quotation (RFQ) process and possible subsequent contract, in accordance with the provisions of the Protection of Personal Information (POPI) Act, 2013 (Act no. 4 of 2013) & Protection of Information Act, 1982 (Act no. 84 of 1982),

.....
Signature

.....
Date

.....
Position

.....
Name of bidder



ANNEXURE A

Requirement list / Specifications			
SUBJECT:			
Item No	Number of Units	Item description	Unit Price
1		<p>1. SCOPE OF WORK AND DELIVERABLES</p> <p>The Occupational Therapist is expected to provide the following services:</p> <ul style="list-style-type: none">a) conduct functional capacity evaluation, including cognitive evaluations (where necessary) for the purpose of determining reasonable accommodation measures;b) provide medico legal services and report writing and set an expert witness in cases where required by the South African Courts of Law;c) conduct workplace assessment for the purpose of determining reasonable accommodation measures at the dtic Campus;d) ergonomical assessment of the environment and make recommendations;e) conduct vocational rehabilitation with the focus on return to work programmes (RTW) and case management of the RTW programme;f) conduct post-implementation evaluation;g) consult with the employee, employee's line manager, and/or the In-house Occupational Medical Practitioner and/ or other role-players in the process;h) consult with other health professionals to obtain medical history / records;i) produce functional capacity evaluation report with recommendations for reasonable accommodation in the workplace;j) produce workplace assessment reports with	



		<p>recommendations for reasonable accommodation in the workplace;</p> <p>k) produce comprehensive functional capacity evaluation and/or workplace assessment reports with recommendations for reasonable accommodation in the workplace;</p> <p>l) report to cover all aspects related to the outcomes of functional capacity evaluation, cognitive and workplace assessment;</p> <p>m) conduct feedback sessions with the dtic stakeholder/s discussing the outcomes of the workplace assessments and recommendations for reasonable accommodation in the workplace;</p> <p>n) make presentations on trends of cases observed to management when required;</p> <p>o) make recommendations on assistive devices suitable for reasonable accommodation and provide specifications of assistive devices recommended;</p> <p>p) implement specialised interventions such as vocational rehabilitation in the workplace to employees by conducting workshops related to disability-specific aspects to managers/employees;</p> <p>q) provide on-site rehabilitation services in cases where required; and</p> <p>r) provide medico legal services and report writing and act as an expert witness in cases where required by the South African Courts of Law.</p> <p>2.QUALIFICATIONS, EXPERIENCE AND PROFESSIONAL REGISTRATIONS</p> <p>The prospective Occupational Therapist is to comply with the following requirements and submit evidence</p>	
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		<p>of meeting the following requirements:</p> <ul style="list-style-type: none">a) A minimum of three (3) years of experience in conducting workplace assessments for disability mainstreaming to determine reasonable accommodation measures for employees with disabilities.b) A minimum of three (3) years of experience in conducting functional capacity evaluations and cognitive assessments for disability to determine reasonable accommodation measures for employees with disabilities providing occupational therapy services for employees and employers.c) The prospective Occupational Therapist must submit three (3) client organisations reference letters (on the company letterhead) with their contact details where similar services were rendered for reference purposes. Reference must include the scope of services rendered.d) Prospective Occupational Therapist must submit:e) Certified copy of an Occupational Therapy degree as recognised by SAQA.f) Copy of registration renewal letter with the Occupational Therapy Association of South Africa. NB: Take note that proof of annual renewal will be required, no later than 31 March of each year.g) Certified valid copy of the proof of registration with the Health Professions Council of South Africa as an Occupational Therapist. NB: Take note that the HPCSA proof of annual registration will be required, no later than 31 March of each year.	
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		<p>a) Certified copy of ID of the Occupational Therapist.</p> <p>b) CV detailing the number of years' experience as an Occupational Therapist and areas of expertise.</p> <p>NB: Failure to comply with 5.1.4 will automatically disqualify the proposal</p> <p>3. Deliverables</p> <p>3.1 Conduct OT assessments at the dtic Campus;</p> <p>3.2 Produce assessment reports with recommendations for reasonable accommodation.</p> <p>3.3 Facilitate implementation of interventions where required.</p> <p>3.4 Conduct feedback sessions.</p> <p>3.5 Conduct presentations to internal stakeholders.</p>	
		Total excluding VAT	
		VAT @ 15% if applicable	
		TOTAL INCLUDING VAT	

Company Name

Signature

Date

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (DEPARTMENT OF TRADE, INDUSTRY AND COMPETITION)					
BID NUMBER:	RFQ - OT- CONTR/03-2025	CLOSING DATE:	25 April 2025	CLOSING TIME:	16:00
DESCRIPTION	OCCUPATIONAL THERAPIST				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Service provider are required to submit their proposal by email to.....					
MMashala@thedtic.gov.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Maryjane Makatola		CONTACT PERSON	Margaret Mashala	
TELEPHONE NUMBER	012 394 3397		TELEPHONE NUMBER	012 394 1845/066 282 5758	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	MMakatola@thedtic.gov.za		E-MAIL ADDRESS	MMashala@thedtic.gov.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		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	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<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:	RFQ NO. OT-CONTR/03-2025
CLOSING TIME 16:00	CLOSING DATE: 25 APRIL 2025

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

- | ITEM NO | DESCRIPTION | BID PRICE IN RSA CURRENCY
*(ALL APPLICABLE TAXES INCLUDED) |
|---------|---|---|
| 1. | TO APPOINT A SERVICE PROVIDER TO PROVIDE OCCUPATIONAL THERAPY SERVICES TO THE DEPARTMENT OF TRADE, INDUSTRY AND COMPETITION FOR THE PERIOD OF THREE YEARS. | |
| 2. | Prices must be quoted in RSA currency and include VAT. | |
| 3. | The contract will be based on hourly rates which must be fixed and **travel and accommodation costs which will be paid in line with National Treasury prescripts as and when required. | |
| 4. | Clearly indicate the hourly rates applicable to this project (certified invoices must be rendered in terms hereof once payment is requested): | |

ITEM	DESCRIPTION	RATE PER HOUR (VAT INCLUSIVE) YEAR 1	RATE PER HOUR (VAT INCLUSIVE) YEAR 2	RATE PER HOUR (VAT INCLUSIVE) YEAR 3
1	Hourly rate	R	R	R

5. Total Hourly Rate of 3-year period (Year 1 + Year 2 + Year 3)R..... for price comparison purposes.
6. Period required for commencement with project after acceptance of RFQ
7. Hourly rates quoted must be firm for the full period of the contract: **Accepted / Not Accepted**

PROPOSALS BASED ON NON-FIRM PRICES WILL AUTOMATICALLY BE DISQUALIFIED

8. **Compliance with National Treasury Instruction on Cost Containment:
- 8.1 Claims for kilometers may not exceed the rates approved by the Department of Transport.
- 8.2 Parking expenses will not be for **the dtic's** account.
- 8.3 Travelling costs and time spent or incurred between the home and office of the consultants, including their staff and **the dtic** head office will not be for the account of **the dtic**.

*** all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies. **Expenses*

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.

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.

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:

.....
.....

3 DECLARATION

I, (name and surname) the undersigned, 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.
- 3.5 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

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.

- 3.7 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 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:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total Points for Price and SPECIFIC GOALS	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:

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

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:

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

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)
HDI (Race / Women/ People with disability)		2		
Local Procurement		6		
SMME's		2		
B-BBEE		10		

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

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

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:
DATE:
ADDRESS:



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

*To request proposals for an Occupational Therapist to render Occupational Therapy services to Department of Trade, Industry and Competition (**the dtic**) employees for three (3) years.*

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REQUEST FOR PROPOSALS:

The Department of Trade, Industry and Competition (**the dtic**) invites interested Occupational Therapist to submit proposals for rendering Occupational Therapy services to **the dtic** employees for three (3) years.

NOTE: Should a vendor have reason to believe that the specification / Terms of Reference is not open to promote competition or that it is written based on a particular brand / product / entity; the vendor shall notify the Bid Office of **the dtic** within ten (10) calendar days after publication of the bid.

1. PURPOSE

- 1.1 The purpose of the project is to obtain the services of a service provider who is competent and able to provide the services of an Occupational Therapist on a need basis for a period of three (3) years.

2. BACKGROUND

- 2.1 The Directorate: Organisational Development and Transformation within the Chief Directorate: Human Resources Management and Development of **the dtic** is responsible for among other services employee health and wellness programmes and disability mainstreaming within **the dtic**.
- 2.2 The Quality of WorkLife (QWL) is the Unit that is responsible for employee health and wellness, while Disability Management Unit is responsible for mainstreaming disability within **the dtic** through various interventions, including reasonable accommodation.
- 2.3 The QWL office is housed in the Employee Wellness Centre (EWC) and consists of an occupational clinic responsible for primary and occupational health care. This unit is capacitated with an Occupational Health Nursing Practitioner (OHNP) and an Occupational Medical Practitioner.
- 2.4 Over the past two years, **the dtic** has seen a growing demand for reasonable accommodation to support Persons with Disabilities, those undergoing rehabilitation, and those requiring management support through the departmental health and wellness programs. Additionally, some employees have been diagnosed with chronic conditions linked to workplace psychosocial stressors, which significantly impact their physical abilities and job performance. Others are receiving specialised treatment for various medical

conditions, further highlighting the need for continued workplace support and accommodation.

2.5 Functional capacity evaluation and workplace assessments are required in order to identify possible reasonable accommodation that would assist employees in meeting their job demands. This requires the Occupational Therapist to work with other Health Professionals where necessary.

2.6 The average number of cases the Department is dealing with on an annual basis is:

No	Item	Number of cases per annum
1.	Functional Capacity Evaluation and report	5
2.	Workplace assessment for determination of reasonable accommodation and report	5
3.	Assessment of Medical reports to determine ergonomic chair specifications and recommendation report for reasonable accommodation/ suitable assistive devices / ergonomic chairs	10
4.	Ergonomic Assessment of the work environment and report	3
5.	Post implementation evaluation	3
6.	On-Site Rehabilitation Services (return to work program)	2
7.	Consultation with employee	15
8.	Consultation with line manager	15
9.	Consultation with in-house Occupational Medical Practitioner/ Occupational Nurse	15
10.	Consultation with other health professionals for obtaining medical history / records	15
11.	Disability-specific related workshops to managers/employees	2
12.	Consultation with the dtic stakeholder/s to discuss outcomes of evaluations and recommendations	10
13.	Presentations on trends of cases observed to management - annually	1
14.	Consult with other external health professionals for obtaining the client medical history / records	15

2.7 It is therefore important that QWL seek the services of an Occupational Therapist with the appropriate expertise and competencies to render functional capacity evaluation (FCE), workplace assessments, vocational rehabilitation with the focus on work programmes (RWT)

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3. OBJECTIVES

3.1 The core objectives of the QWL Programme are:

- a) Promoting the total wellbeing of **the dtic** employees and their work environment;
- b) Empowering management to create and facilitate an environment that will be conducive for employee satisfaction and motivation.

3.2 The main objectives of the Disability Management Programme are:

- a) Identifying barriers to employment and progression of Persons with Disabilities;
- b) Facilitating the implementation of interventions and programmes to provide reasonable accommodation,
- c) Seeking to synchronise employees as well as organisational needs to ensure that employees are motivated and capacitated to perform on the objectives of the department.

4. SCOPE OF WORK AND DELIVERABLES

4.1 The Occupational Therapist is expected to provide the following services:

- 4.1.1 conduct functional capacity evaluation, including cognitive evaluations (where necessary) for the purpose of determining reasonable accommodation measures;
- 4.1.2 provide medico legal services and report writing and set an expert witness in cases where required by the South African Courts of Law;
- 4.1.3 conduct workplace assessment for the purpose of determining reasonable accommodation measures at **the dtic** Campus;
- 4.1.4 ergonomical assessment of the environment and make recommendations;
- 4.1.5 conduct vocational rehabilitation with the focus on return to work programmes (RTW) and case management of the RTW programme;
- 4.1.6 conduct post-implementation evaluation;
- 4.1.7 consult with the employee, employee's line manager, and/or the In-house Occupational Medical Practitioner and/ or other role-players in the process;
- 4.1.8 consult with other health professionals to obtain medical history / records;
- 4.1.9 produce functional capacity evaluation report with recommendations for reasonable accommodation in the workplace;
- 4.1.10 produce workplace assessment reports with recommendations for reasonable accommodation in the workplace;

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- 4.1.11 produce comprehensive functional capacity evaluation and/or workplace assessment reports with recommendations for reasonable accommodation in the workplace;
- 4.1.12 report to cover all aspects related to the outcomes of functional capacity evaluation, cognitive and workplace assessment;
- 4.1.13 conduct feedback sessions with **the dtic** stakeholder/s discussing the outcomes of the workplace assessments and recommendations for reasonable accommodation in the workplace;
- 4.1.14 make presentations on trends of cases observed to management when required;
- 4.1.15 make recommendations on assistive devices suitable for reasonable accommodation and provide specifications of assistive devices recommended;
- 4.1.16 implement specialised interventions such as vocational rehabilitation in the workplace to employees by conducting workshops related to disability-specific aspects to managers/employees;
- 4.1.17 provide on-site rehabilitation services in cases where required; and
- 4.1.18 provide medico legal services and report writing and act as an expert witness in cases where required by the South African Courts of Law.

5. QUALIFICATIONS, EXPERIENCE AND PROFESSIONAL REGISTRATIONS

- 5.1. The prospective Occupational Therapist is to comply with the following requirements and submit evidence of meeting the following requirements:
 - 5.1.1 A minimum of three (3) years of experience in conducting workplace assessments for disability mainstreaming to determine reasonable accommodation measures for employees with disabilities.
 - 5.1.2 A minimum of three (3) years of experience in conducting functional capacity evaluations and cognitive assessments for disability to determine reasonable accommodation measures for employees with disabilities providing occupational therapy services for employees and employers.
 - 5.1.3 The prospective Occupational Therapist must submit three (3) client organisations reference letters (on the company letterhead) with their contact details where similar services were rendered for reference purposes. Reference must include the scope of services rendered.
 - 5.1.4 Prospective Occupational Therapist must submit:
 - a) Certified copy of an Occupational Therapy degree as recognised by SAQA.
 - b) Copy of registration renewal letter with the Occupational Therapy Association of South Africa. **NB: Take note that proof of annual renewal will be required, no later than 31 March of each year.**

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- c) Certified valid copy of the proof of registration with the Health Professions Council of South Africa as an Occupational Therapist. **NB: Take note that the HPCSA proof of annual registration will be required, no later than 31 March of each year.**
- d) Certified copy of ID of the Occupational Therapist.
- e) CV detailing the number of years' experience as an Occupational Therapist and areas of expertise.

NB: Failure to comply with 5.1.4 will automatically disqualify the proposal

5.2 Deliverables

- 5.2.1 Conduct OT assessments at **the dtic** Campus;
- 5.2.2 Produce assessment reports with recommendations for reasonable accommodation.
- 5.2.3 Facilitate implementation of interventions where required.
- 5.2.4 Conduct feedback sessions.
- 5.2.5 Conduct presentations to internal stakeholders.

6. DUE DILIGENCE

- 6.1 The bidder must have current technical and logistical capacity to perform the work required. **the dtic** reserves the right to perform due diligence on facilities, resources and capacity of a bidder prior to the appointment of an Occupational Therapist.

7. SPECIAL CONDITIONS

- 7.1 A service level agreement must be signed with the successful bidder before work commences. a contractual relationship will only commence once the service level agreement is signed by both parties;
- 7.2 The bidder must participate actively and be available to perform services in accordance with the contract.
- 7.3 As previously indicated **the dtic** reserves the right to vet all qualifications and other documentation provided by bidders to prove relevant qualifications, experience and expertise prior to the appointment of an Occupational Therapist.
- 7.4 Copyright and intellectual property rights to all documentation, reports etc. that emanate from this assignment will vest with **the dtic**.
- 7.5 This bid and all contracts emanating there from will be subject to the General Conditions of Contract issued in accordance with Treasury Regulation 16A published in terms of the Public Finance Management Act, 1999 (Act 1 of 1999). Special Conditions of Contract are

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supplementary to that of the General Conditions of Contract. Not all bids will contain special conditions of the contract. Where, however, the Special Conditions of Contract are in conflict with the General Conditions of Contract, the Special Conditions of Contract prevail.

- 7.6 Bids received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where possible, be returned unopened to the bidder.
- 7.7 Bidders' attention is drawn to the fact that amendments to any of the Bid Conditions or setting of counter conditions by bidders may result in the invalidation of such bids.
- 7.8 The State reserves the right to conduct supplier due diligence prior to the final award or at any time during the contract period. This may include site visits.
- 7.9 The Bid Office Officials of **the dtic** may communicate with bidders where clarity is sought after the closing date of the bid and prior to the award of the contract, or to extend the validity period of the bid, if necessary.
- 7.10 All communication between the bidder and the Bid Office Officials of **the dtic** must be done in writing.
- 7.11 Bidders must ensure that they are registered on the Central Supplier Database of the National Treasury as this is compulsory with effect of 1 April 2016 in order for bidders to be considered for bids.
- 7.12 Bidders must ensure that their tax matters are in order in line with the Preferential Procurement Policy Framework Act and the Treasury Regulations.
- 7.13 Bidders' whose tax matters are not declared to be in order will be disqualified.
- 7.14 Bidders' attention is drawn to the tax requirements stated on the SBD 1 form.
- 7.15 Where applicable acceptance of a bid will be subject to the condition that both the contracting firm and its personnel providing the service must be cleared by the appropriate authorities to the level of CONFIDENTIAL/SECRET/TOP SECRET (whichever one is stipulated in the relevant specification / ToR). Obtaining a positive recommendation is the responsibility of the contracting firm concerned. If the principal contractor appoints a subcontractor, the same provisions and measures will apply to the subcontractor. Acceptance of the tender is also subject to the condition that the contractor will implement all such security measures as the safe performance of the contract may require." (Minimum Information Security Standards. Chapter 5).
- 7.16 The points scored for functionality, price and B-BBEE points will be rounded off to the nearest 2 decimals as determined in the PP Regulations of 04 November 2022.
- 7.17 In cases where the tender invitation is subject to a pre-qualification requirement based on sub-contracting, then it is the responsibility of the tenderer to select competent sub-contractors that meet all the requirements of the tender in order to ensure that the

bidders tender is not jeopardized by the subcontractor during evaluation. Bidders are responsible for all due diligence on their subcontractors.

- 7.18 In cases where the above-mentioned market-related prices are quoted the right is reserved to negotiate with the three preferred bidders (three highest on final points for price and **the dtic** specific goals).
- 7.19 Bidders to take note that the award of the tender may be subject to price negotiation with the preferred bidder.
- 7.20 This bid is subject to the PP Regulations of 04 November 2023.
- 7.21 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 7.22 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 7.23 Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangement. **the dtic** will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.
- 7.24 The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.
- 7.25 Regulation 13 (c) of the Public Service Regulations 2016 determines that an employee shall not conduct business with an organ of state or be a director of a public or private company conducting business with an organ of state unless such employee is in an official capacity a director of a company listed in schedule 2 and 3 of the Public Finance Management Act. As this regulation prohibits public service employees from conducting business with an organ of state; either in a personal capacity or as a director of a private or public company, non-compliance with this regulation will lead to automatic disqualification of a bid. **the dtic** reserves the right:
- 7.26 To award this tender to a bidder that did not score the highest total number of points, only in accordance with section 2(1)(f) of the PPPFA (Act 5 of 2000).
- 7.27 To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price, without offering the same opportunity to any other bidder(s) who has not been awarded the status of the preferred bidder(s).
- 7.28 To accept part of a tender rather than the whole tender.

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- 7.29 To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the Bid.
- 7.30 To correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process.
- 7.31 To cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.
- 7.32 Award to multiple bidders based either on size or geographic considerations.
- 7.33 Bidders will be allowed to submit queries or request clarification up to one week prior to the closing date of this bid. Thereafter no queries / clarification requests will be responded to.

8. PRICE

- 8.1 The bid price must represent the total cost of the project which will be payable by **the dtic** to the appointed Occupational Therapist upon satisfactory work delivery, in accordance with an agreed payment schedule which must be linked to set deliverables. The payment schedule will be stipulated in the SLA.
- 8.2 Bid prices are required in the form of hourly rates. The bid price must represent hourly rates of the project leader and key team members allocated to **the dtic**. Two fixed hourly rates, one for each year of the contract period. Payment based on hourly rates will be payable by **the dtic** to the successful Occupational Therapist upon satisfactory work delivery, in accordance with an agreed payment schedule which will be linked to set deliverables. Please see the attached SBD 3.3 on how pricing must be quoted. The average hourly rate will be used for price comparison purposes in the 80/20-point system.
- 8.3 The bid price must be inclusive of VAT and quoted in RSA currency.
- 8.4 In accordance with National Treasury Instruction No. 03 of 2017/2018 on Cost Containment Measures, rates of remuneration will be subject to negotiation, not exceeding the applicable rates as contained in the following guidelines:
 - 8.4.1 The "Guide on Hourly Fee Rates for Consultants", as issued by the Department of Public Service and Administration (**dpsa**); and/or
 - 8.4.2 Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant. The rates as determined in the "guidelines for fees", in accordance with the Board of Healthcare Funders of South Africa (BHF) approved rates, and the successful Occupational Therapist is required to invoice the dtic, on a monthly basis.

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9. THE DTIC OBLIGATIONS

- 9.1 **the dtic** Project Manager will serve as the contact person on all matters relating to the project.
- 9.2 **the dtic** Project Manager will review, evaluate and approve the services provided by the Occupational Therapist against the Service Level Agreement on an ongoing basis and prior to making payment.
- 9.3 **the dtic** will supply all reasonable, relevant, available data and information required and requested by the Occupational Therapist for the proper execution of the services and such assistance as shall reasonably be required by the bidder in carrying out their duties under this contract.
- 9.4 **the dtic** Project Manager will be responsible for the following arrangements:
- a) Create awareness of the intervention and the services;
 - b) Report and monitor project progress.

10. BIDDER'S OBLIGATION

- 10.1 The bidder undertakes to act as an independent contractor in respect of the work;
- 10.2 To work closely with the Project Manager responsible for the project in **the dtic**;
- 10.3 Attend meetings when required by the Project Manager for the purposes of obtaining information or advice with regard to the work and assignments or any matters arising from or in connection therewith;
- 10.4 The bidder will be responsible for its own computers and technical literature to adequately perform all the functions;
- 10.5 The bidder must exercise all reasonable skill, care and diligence in the execution of the work and shall carry out their obligation in accordance with professional standards;
- 10.6 The bidder must in all professional matters act as a faithful advisor to **the dtic** as well as respecting the laws and customs of any country and provinces in which any business in relation to the project is conducted;
- 10.7 All information availed to the bidder in the course of the project must be deemed confidential and will remain the property of **the dtic**;
- 10.8 The bidder will be required to sign a confidentiality declaration form, undertaking to keep all the information at his/her disposal as a result of being awarded the contract by **the dtic** strictly confidential;
- 10.9 The bidder must not disseminate any information gathered during the conduct of the project, publicise or release media statements in relation to the assignment.
- 10.10 Any information gathered during the conduct of the assignment is the property of **the dtic** and may not be distributed without prior written approval of **the dtic**;

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- 10.11 The bidder will be deemed to have been satisfied as to the correctness and sufficiency of the rates and prices set out in their bid for the services to be rendered; and
- 10.12 The bidder must plan and provide for all possible risks that may affect the delivery of the project on time and indicate what mechanisms are in place to manage such risks.

11. BID EVALUATION CRITERIA

11.1 The 80/20 principle and **two envelope/ email system** will apply in evaluating the proposals in accordance with the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and its accompanying Preferential Procurement Regulations, 2022 that came into effect on 16 January 2023.

11.2 Two envelope/email system

The two envelope/ email system is based on the submission of the functional and financial proposals in two separate envelopes/emails. **NO** financial/pricing information may be contained in the functional envelope/email.

FAILURE TO ADHERE TO A TWO ENVELOPE SYSTEM WILL RESULT IN A DISQUALIFICATION

Submission must be done as follows:

11.2.1 Functional proposal:

- 11.2.1.1 Bidders must submit their functional proposal in a sealed envelope / email with the name of the bidder, closing date and time and the bid number clearly indicated on the envelope / email. This envelope / email should **only** contain the functional proposal and compulsory forms (1; 4; 6.1 ;) and General Conditions of Contract as well as the original / originally certified copy of the B-BBEE certificate or Affidavit but **NO** financial/pricing information.
- 11.2.1.2 Bidders who wish to claim for preferential procurement points applicable to this TOR must ensure that the SBD 6.1 claim form is completed and accompanied by the relevant proof required.
- 11.2.1.3 Subsequent to the above, the bidder is required to adhere to the following regarding the departmental goals:
- HDI (Race, Women and Persons with disabilities)
- Submit proof of disability (Letter from General Practitioner/specialist with regard to your disability is required to substantiate a claim) Small Medium Micro Enterprises (SMME's)
 - SARS return indicating annual turnover/ B-BBEE certificate (Sanas)/CIPC B-BBEE certificate / Sworn Affidavit

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- Local Procurement (Provincial / Municipal)
- Service Provider who reside in a Province - GAUTENG
- Proof of address (municipal rates/ bank statements/ lease agreement / affidavit etc.)
- B-BBEE compliance based on Section 10 of the B-BBEE Act (Act 53 of 2003 as amended by Act 46 of 2013)
- B-BBEE certificate/ CIPC B-BBEE certificate / Sworn Affidavit

11.2.2 Financial proposal:

11.2.2.1 The financial proposal and SBD 3.3 pricing schedule must be submitted in a **SEPARATE** sealed envelope / email with the name of the bidder, closing date and time and the bid number clearly indicated on the envelope / file.

11.3 All proposals will be evaluated in terms of the two-phase process once the pre-qualifying of bids received is done. All bid proposals received are subject to a pre-qualification process to determine compliance with compulsory requirements / conditions. All bids that pass the pre-qualification process will then be evaluated as follows:

11.3.1 **First phase: Functional evaluation.** This evaluation is based on the functional proposal submitted in envelope / email one (functional envelope). For this phase there is a cut-off score of 60% and only the proposals that score 60% and above during the functional evaluation will be considered during the second phase of evaluation.

11.3.2 **Second phase: Price and dtic specific goals.** All Bids that complied will be considered for the second phase where points will be calculated for price and **the dtic** specific goals scores in accordance with the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and its accompanying Preferential Procurement Regulations, 2022.

Key scores

Score	Description
1 – Poor	Unacceptable, does not meet set requirements
2 – Average	Reasonable but not sufficient to fully satisfy the set requirements
3 – Good	Fully complies with the set minimum requirements
4 – Very Good	Above-average compliance with the set requirements
5 – Excellent	Meets and exceeds the set requirements

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PHASE 1: FUNCTIONAL EVALUATION

No.	Criteria	Weight	Scoring criteria
1.	Bidder's experience in conducting workplace assessments, functional capacity evaluations, including cognitive assessments		
1.1	Three years or more years conducting workplace assessments for disability mainstreaming to determine reasonable accommodation measures for employees with disabilities	40	5 = more than 5 years 4 = 4 years 3 = 3 years' experience 2 = 2 years' experience 1 = 1 years' experience
1.2	Three years or more years' experience conducting functional capacity evaluations and cognitive assessments for disability to determine reasonable accommodation measures for employees with disabilities providing occupational therapy services for employees and employers.	40	5 = more than 5 years 4 = 4 years 3 = 3 years' experience 2 = 2 years' experience 1 = 1 years' experience
1.3	Proof of delivering similar projects: Three Reference Letters with contact details from three (3) client organisations reference letters (on the company letterhead) with their contact details where similar services (i.e. workplace assessments, functional capacity evaluations and cognitive assessments to determine reasonable accommodation; reporting and specialised interventions) were rendered for reference purposes. Reference must include the scope of services rendered.	20	5 = more than 5 references where similar services were rendered 4 = 4 references where similar services were rendered 3 = 3 references where similar services were rendered 2 = 2 references where similar services were rendered 1 = 1 reference where similar services were rendered
MAXIMUM POINTS		100	

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PHASE 2: PRICE AND PREFERENCE POINTS

	<u>80/20 PRINCIPLE</u>	POINTS
1	<u>Price</u>	80
2	<u>the dtic specific goals</u> 1. Historically disadvantaged individuals (2) 2. Local procurement (6) 3. SME (2) 4. B-BBEE (10) NB: Please complete dtic SBD 6.1 to claim these points.	20
	MAXIMUM POINTS	100

12. CONTRACTUAL PERIOD

- 12.1 The contract period is three (3) years. The commencement and end date will be specified in the Service Level Agreement.

13. SUBMISSION OF DOCUMENTS

Please submit the bid to:

Ms L Ndou

Email LNdou@thedtic.gov.za

Tel: 012 394 3997

14. CONTACT DETAILS

Please direct all **technical / terms of reference / specification** questions to:

Ms M Makatola

The Department of Trade and Industry (**the dtic**)

Email: MMakatola@thedtic.gov.za

Please direct all **bid-related** questions to:

Mr. K Mokoena

The Department of Trade and Industry (**the dtic**): **Bid Office**

Email: KMokoena@thedtic.gov.za