



Company name of Bidder: .....

**BID NO: 2021/01/HO**

**CASIDRA (SOC) LTD HEAD OFFICE: SERVICES OF A TRAINING PROVIDER  
FOR ASSESSOR AND MODERATOR FOR NQF LEVEL 4 PROJECT  
MANAGEMENT UNIT STANDARDS**

**AUGUST 2021**

**FRAMEWORK AGREEMENT**

**This document is not for sale. Any entity that requests payment must be reported at the contact person indicated in this tender.**

<b>BID AMOUNT</b>	.....
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**GENERAL REQUIREMENTS**

**Casidra requires the services of Registered Assessor and Moderator to provide an independent assessor and moderator service over a 2-year period commencing in 2021.**

One of the objectives of the assessor and moderator function is to assist the Human Capital department with the assessing, moderating and external moderation process with Services Seta for the accredited five-day NQF Level 4 - Project Management Skills course. The accredited skills programme consists of following Unit Standards:

Unit Standard 120372: Explain fundamentals of project management

Unit Standard 120384: Develop a simple schedule to facilitate effective project execution

Unit Standard 120385: Apply a range of project management tools and techniques

The registered assessor and moderator will be required to build and strengthen good governance. The successful bidder must have the capacity to start the work within 7 (seven) days of appointment and complete the work within 30 (thirty) days. This has to be done through furnishing the Human Capital Department with completed reports, forms, analyses, recommendations, counsel and information concerning the activities that have been reviewed as well as regular feedback.

### The Assessor

- Plan for the assessment.
- Prepare for the assessment.
- Conduct the assessment according to established assessment principles and decide whether the candidate has met the required learning outcomes.
- Evaluate and judge the evidence.
- Record the assessment decision.
- Provide feedback.
- Complete all documentation and forward to the ETQA.
- Review the assessment process and provide feedback for improvement of internal processes if required.
- Comply with all ETQA requirements.

### The Moderator

- Ensuring that assignments and tests are carried out correctly and fairly.
- Ensuring that the principles of quality assurance have been applied and maintained.
- Evaluating the performance of the Assessor

### The Assessor and Moderator

- Internal control processes are fair, valid, and carried out correctly
- External control processes fair, valid and carried out correctly
- Compliance with policies, regulations, and contracts for all parties involved in the process
- The safeguarding of Portfolio of Evidence and all documentation
- Compliance with laws, regulations, and controls.

## EXPERTISE REQUIRED

**The following criteria is non-negotiable and is a condition to the award of this bid:-**

- The service provider **MUST** be registered as an assessor and moderator with Services Seta
- The service provider **MUST** be registered as an assessor and moderator for the full NQF Level 4 – Project Management qualification (SAQA ID: 50080)
- The service provider **MUST** be registered with Project Management South Africa
- The service provider **MUST** be able to present a portfolio of endorsed assignments completed with Services Seta for previous clients.
- The service provider **MUST** be a ICDL consultant or ICDL test centre
- The service provider **MUST** have an in depth understanding of assessing and moderating processes, Services SETA processes & Services SETA LMIS
- The service provider **MUST** have more than ten years' experience in assessing and moderating Portfolios of Evidence and have experience working with State Owned Companies
- The service provider **MUST** have more than three years of Monitoring and Evaluation experience

Documents are available for the bidder to download from the following website address under the specific tender - <https://casidra.co.za/tenders/>

Documents for the purpose of this bid include:

1. Conditions to Submit Bid (Form CPBD 2.2 (Measured))
2. Price Form, Bill of Quantities and Schedules (Form CPBD 3.2 (Measured))
3. Scope of Works (Form CPBD 4)
4. PPP Evaluation Form (Form CPBD 5.1 (80/20))
5. Bank Entity Form (Form CBD 7), unless the banking details of the company indicate “verified” on the Central Supplier Database (CSD).
6. Registration on the CSD for all suppliers is compulsory and registration numbers must be supplied.

***In accordance with Casidra’s Preferential Procurement Policy, this bid as further indicated in CPBD 5.1 is subject to:***

- *A functionality compliance test;*
- *B-BBEE certified bids will receive preferential scores;*

The successful bidder will be required to complete and sign a Service Level Agreement (**CPBD 8**).

**BID DEADLINE:** The closing date for the bid is **15th September 2021** strictly at **12H00**.

## **SUBMISSION OF BIDS**

Bids must be submitted in a sealed envelope with the name of the bidder and the inscription **“PROFESSIONAL SERVICES: TRAINING PROVIDER FOR ASSESSOR AND MODERATOR FOR NQF LEVEL 4 PROJECT MANGEMENT UNIT STANDARDS – BID NO. 2021/01/HO”** and placed in the bid box available at outside the front entrance of **Casidra’s** Head Office, 22 Louws Avenue, Southern Paarl. No faxed, counter-to-counter courier or posted bids will be accepted.

The following documents (including fully completed and signed **CPBD** forms numbered 1 to 7 as supplied) must be **valid for a period of 90 calendar days** after closure of the bid and submitted as a bid packet:

Document number	Document description	Action required/comment	Mark √
CPBD 1	General requirements	Signed	
CPBD 2.2	Conditions to submit bid (measured)	Signed	
CPBD 3.2	Price form (measured)	Complete, sign	
CPBD 4	Scope of works	Signed	
CPBD 5.1 80/20)	PPP Evaluation form	Complete, sign	
CPBD 7	Bank Entity form (Not needed if “verified” on CSD)	Complete, bank stamp	
TCC of principle and sub-contractors	Registration and verification of Tax Clearance on CSD.	<b>Compulsory</b>	
BEE	B-BBEE Certificate or Sworn Affidavit (as applicable, see CPBD 5 for detail)	Original affidavit or certified copy certificate/Valid/not compulsory	
Company Profile	A detailed company profile, including the core competencies relevant years of experience,	<b>Compulsory</b>	

		contact details of three work-related references that are qualified to comment on work.		
CPBD	3.2	Proof of previous work and contact details of three work-related references that are qualified to comment on work.	Compulsory	
CPBD	3.2	Unit rates for the works on the forms as supplied	Compulsory	
CPBD	3.2	Indication if any changes are proposed in scope of works and cost implication.	If required	
PORTFOLIO		Portfolio of previous endorsed projects with Services Seta together with proof of assessing and moderating	Compulsory	
COIDA		Letter of good standing of the Contractor in terms of COIDA.	Valid	
Proof of registration		As Assessor/Moderator for FETC: Project Management accreditation, SAQA ID 50080 with Services SETA	Compulsory	
CV's of the assessor and moderators		The Assessor/Moderator cannot be the same person. CV's of at least two assessors and two moderators to be provided	Compulsory	

All technical enquiries can be referred to **Chesnay du Preez**, Human Capital Coordinator: Training and Development at 021 – 863 5000.

## TAX CLEARANCE CERTIFICATE REQUIREMENTS

It is a condition of bid that the taxes of the successful bidder **MUST** be in order, or that satisfactory arrangements have been made with the South African Revenue Service (SARS) to meet the bidder's tax obligations.

In order to meet this requirement, bidders must ensure that they are registered on the CSD and their tax status on the CSD are indicated as compliant. If a discrepancy exist between the CSD and the SARS eFiling of the supplier, then a printed version of the Tax Clearance Certificate must be supplied by the supplier and the eFiling PIN number for verification of authenticity by **Casidra** on the SARS website.

Foreign suppliers with no tax obligation in South Africa must request from **Casidra** and complete a form SBD1 that will be submitted to SARS for verification and issuing of a Confirmation of Tax Obligation letter.

Where Consortia / Joint Ventures / Sub-Contractors are involved, each party must submit a separate Tax Clearance Certificate.

## COIDA REQUIREMENTS

The aim of the COID Act is to provide for compensation in the case of disablement caused by occupational injuries and diseases, sustained or contracted by employees in the course of their employment, or death resulting from such injuries and diseases; and to provide for matters connected therewith.

Workers who are injured on duty or obtain an occupational disease can claim compensation for temporary or permanent disablement. If workers die as a result of an injury on duty, their dependants will also be entitled to claim compensation. Employers that registered their employees are protected against civil claims in this regard. The COIDA basically prevents employees covered by the act from suing their employers for damages in terms of common law.

Please note that the following employers are exempted and do not have to pay assessment fees:

- National and provincial state departments;
- Certain local authorities
- Employers insured by a company other than the Compensation Fund like Mutual Associations. There are currently two approved mutual associations:
  - Federated Employers Mutual Assurance (FEMA), for the building industry; and
  - Rand Mutual Assurance Company (RMA), for the mining industry.

According to prescription, anyone who employs one or more part- or full time workers **must register** with the Compensation Fund and pay annual assessment fees. The Compensation Fund is a trust fund that is controlled by the Compensation Commissioner and employer contributes to the Compensation Fund. The Commissioner is appointed to administer the Fund and approve claims lodge by employees or their dependants. This means that the Fund will compensate the employee or their dependants and not the employer.

Where a service provider do not have any personnel in employment at time of tender, a letter from the Department of Labour must still be submitted indicating this status. A period of 14 days will be allowed after tender award for registration.

## CENTRAL SUPPLIER DATABASE

National Treasury indicated during 2015 the development and future use of the Central Supplier Database (CSD) as a way of simplifying the process of doing business with government.

The CSD will be the source of all supplier information for all organs of state and will reduce the exchange of compliance documents in paper form, eliminate multiple registrations with different organs of state and ultimately reduce the cost for both business and government by enabling electronic registration and verification process.

The CSD will interface with SARS to verify tax clearance certificates and the Companies and Intellectual Property Commission (CIPC) for business registration and business ownership information. The CSD will furthermore verify supplier information with the register for tender defaulters and database of restricted suppliers. (Please see Fact Sheet and CSD pamphlets.)

From 1 September 2015 prospective suppliers should self-register on the CSD website [www.csd.gov.za](http://www.csd.gov.za). Apart from registering and capturing supplier information on the CSD, suppliers currently on any database of organs of state need to maintain their records through the existing supplier systems for the period 1 September 2015 to 31 March 2016. This period will be referred to as the Interim Period. During the Interim Period suppliers that register on the CSD must provide their CSD supplier number and unique security code that will be communicated to them as well as any other relevant documentation (not yet electronically verified by the CSD) to the organs of state they want to do business with. **Casidra** urges all their suppliers to please comply with the request.

During the transitional period until 31 March 2016 **Casidra** will migrate our current supplier database to CSD to ensure accuracy and validation of information prior to mandatory implementation of the database.

For more information please contact National Treasury [ocpo.treasury.gov.za](http://ocpo.treasury.gov.za) ([http://ocpo.treasury.gov.za/Suppliers\\_Area/Pages/Central-Supplier-Database.aspx](http://ocpo.treasury.gov.za/Suppliers_Area/Pages/Central-Supplier-Database.aspx)) or [Central Supplier Database for Government](https://secure.csd.gov.za/) (<https://secure.csd.gov.za/>).





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**CASIDRA (SOC) LTD HEAD OFFICE: SERVICES OF A TRAINING PROVIDER  
FOR ASSESSOR AND MODERATOR FOR NQF LEVEL 4 PROJECT  
MANAGEMENT UNIT STANDARDS**

**GENERAL TERMS AND CONDITIONS OF BID**

**Definitions:**

In this Agreement, unless the context clearly indicates a contrary intention, the following words will have the following meanings and cognate expressions will have corresponding meanings:

“Project Manager” means an official appointed and in charge of coordinating the project at **Casidra** SOC Ltd. in accordance with the provisions of these terms and conditions.

“Project” means (**PROFESSIONAL SERVICES: TRAINING PROVIDER FOR ASSESSOR AND MODERATOR**) as further identified under the project name as above.

“Service level” means the stipulated criteria applicable to the indicated project, including any set of criteria relating to the performance of the Contractor.

“Project Team” or “Steering Committee” means the people appointed by the Client and identified to guide the project and approve achievements.

“Client” or “the Client” means **Casidra** SOC Ltd.

“Employee” means a person employed in the public administration including persons contemplated in section 12A of the Public Service Act (advisors to executive authority) and a person performing similar functions in a municipality or a provincial public entity, whether permanently or temporarily.

“Family member” means a spouse (partner in marriage, customary union according to indigenous law or a relationship in which the parties live together in a manner resembling a marital partnership), child, parent, brother or sister, whether such relationship results from birth, marriage or adoption.

Unless the context clearly indicates a contrary intention, any word denoting any gender includes the other gender, the singular includes the plural and vice versa, natural person includes artificial persons and vice versa and insolvency includes provision or final sequestration, liquidation or judicial management.

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“**acceptable tender/bid**” means any tender which, in all respects, complies with the specifications and conditions of tender as set out in the tender document.

## **1. Service Specifications**

The Service Provider shall pursue the project in accordance with the service specifications as per the Scope of Works, **CPBD 4**.

## **2. Changes In Scope Of Contract**

- a. In the event of any project being discontinued or any extreme condition/s that will lead to wasteful expenditure during the contract period, the Service Provider shall inform the Client accordingly, so as to:
  - 2.1.1 cease the service in that particular project;
  - 2.1.2 or for another project to be identified as a replacement project.
- b. In the event of 2.1 and 2.3, notice in writing shall be given to the Service Provider with regards to change in scope.
- c. The effect of such changes in terms of cost and deliverables due will be consulted with the Service Provider and agreed upon between the parties.
- d. Other minor changes in scope will be done officially by means of a written Variation order, issued by the Client, indicating the effect on the scope, budget, duration and deliverables.
- e. Directives by the Client that forms part of the current project scope, but only ensure the methodology, quality, clarity or presentation does not form part of the arrangement.

## **3. Framework agreement Bid**

No unit price adjustment of whatever nature, except for decreases or increases in the Value-added Tax (VAT) and / or Variation Orders, shall be applicable in this contract. The Service Provider shall make provision in his/her price for possible fluctuations in costs and indicate such time related costs on **CPBD 3.2**.

## **4. Project Manager**

The person appointed by the Client to act as the Project Manager, is **Chesnay du Preez**, Human Capital Coordinator: Training and Development at 021 – 863 5000. Her email address is [cdupreez@casidra.co.za](mailto:cdupreez@casidra.co.za).

## **5. Acceptance of Bids**

The Client is not bound to accept the lowest bid nor is it required to give reasons for selecting one Service Provider in favour of another.

## **6. Expenses in Preparation of Bid**

The Client will not be responsible for, nor pay any expenses for losses which the Service Provider may incur in preparation of this bid.



## **7. Value Added Tax**

The total quoted price must include Value Added Tax. A **compulsory valid tax clearance certificate of the principle as well as the sub-contractors must be available on the CSD.**

## **8. Accounts And Payments**

8.1 The Client and the Service Provider shall each appoint its project manager/supervisor that shall work in close cooperation in order to facilitate the flow of information, solving of problems, accounts, payments etc. between the parties.

8.2 Payment of accounts received by the Client in terms of the Services rendered, shall be effected within 30 days after receipt of a correctly completed and approved progress report or work module. The Client does not accept responsibility for delays in payment due to faulty accounts or paperwork.

## **9. Responsibility of the Client**

The Client will:

9.1 Ensure that payments are done in accordance with the agreed payment schedule.

9.2 Not unnecessarily and for an unreasonable period delay any approvals or directives that is needed for the project to proceed.

## **10. Responsibility of the Service Provider**

The Service Provider will:

10.1 Provide the necessary capacity to properly execute the project in terms of the Specifications.

10.2 Supply an adequate labour force in order to render an acceptable standard of service to the Client. This labour force is to conduct itself in an efficient and professional manner, in carrying out their duties.

10.3 The Service Provider's supervisor, who shall be identified in writing to the Client's representative and empowered to act for him/her, shall constantly be present in meetings. The supervisor shall attend to any problems or complaints that may arise, and directives given to him/her by the Client's representative shall be deemed to be given to the Service Provider. The supervisor must be contactable at all reasonable times, preferably to be equipped with a cellular phone.

10.4 Conform to all Laws, Regulations or By-Laws of any Department of State, Provincial Administration or Local Authority which may be applicable hereto.

10.5 Be responsible for the travelling, accommodation, work tools and management of its services.

## 11. General

- 11.1 Under no circumstances must the Service Provider accept that it has been appointed without the completed documentation as described hereafter.
- 11.2 The successful Service Provider will be given notification in writing / by means of an appointment letter, and the signing of a Service Level agreement, together with this document, will form the contract.
- 11.3 The Service Provider is responsible to complete all the work according to the quoted price.
- 11.4 The attached form **CPBD5.1**, “PPP – Evaluation Criteria of the Service Provider”, **MUST** be completed, signed and handed in as part of the bid documents by the Service Provider.
- 11.5 The Service Provider must provide all details of any references of previous work of similar nature or that demonstrates the ability of the Service Provider to perform a task of this nature (refer “PPP – Evaluation Criteria: References of previous work”).
- 11.6 The Service Provider hereby gives approval to the Client to conduct a “credit reference check” as part of the functional requirements in evaluation of this bid.
- 11.7 The Service Provider **must include** all relative information and documents as described in **CPBD1** with the bid in order to successfully complete the application.
- 11.8 NO TIPP-EX may be used to rectify mistakes or errors in the text or prices.

## 12. Cancellation of the project

The Client retains the right to partially or completely, amend, award or cancel this project before appointing any Service Provider.

## 13. Evaluation of the bid

The awarding of bids are dependent on the special evaluation criteria as set out in the policies of **Casidra**. The evaluation criteria of this Preferential Procurement Policy is based on the “**Preferential Procurement Policy Framework (Act 5 of 2000)**” and related Regulations and updates.

Further detail on the application of this regulations is as in document **CPBD 5.1**. Awarding of the bid is dependent on a preferential points system, and every presentation is measured against the specific evaluation criteria as shown. The completion and signing of this document is thus a pre-requisite to qualify as a service provider.

## 14. Declaration of interest

Any employee may not conduct business with the State or be a director of a public or private company conducting business with the State. (Public Administration Management Act 11 of 2014).

In view of possible allegations of favouritism, it is required that the bidder declare his/her position in relation to the Client. The bid may be disregarded if that bidder or its directors have

abused the Client's supply chain management system, committed fraud or any other improper conduct in relation to such system.

An Employee, taking remunerative work outside public enterprise, should first obtain the necessary approval. Failure to submit proof of such authority may result in disqualification of the bid.



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**CASIDRA (SOC) LTD HEAD OFFICE: SERVICES OF A TRAINING PROVIDER  
FOR ASSESSOR AND MODERATOR FOR NQF LEVEL 4 PROJECT  
MANAGEMENT UNIT STANDARDS**

**Background**

**Casidra** is currently inviting service providers to provide training assessor and moderating services as part of its corporate plan. As part of this process, **Casidra** wishes to employ the services of a training assessor and moderator, to work with the company for a **2-year period**, commencing in **2021**.

The bidder must therefore agree that they are available to start work within 1 month of the award of an order & that they have capacity to fulfil the work.

We \_\_\_\_\_ hereby acknowledge that we have sufficient resources to execute works as per the framework agreement and scope of works as specified in this document. (Tick box)

YES	NO
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**Framework Agreement Conditions**

The framework period set for this contract is **2 years** upon the award of an official order to the successful bidder and the bidder hereby confirms that their bid price will be fixed upon award of the contract until the end of the framework period.

**Casidra** may also procure the work in other ways, and does not guarantee that any work will be procured under this agreement.

**Take note: This tender will be evaluated on the criteria for a market related price. The full cost of the service and/or works must be indicated and may not be discounted or cross subsidised against another service, project, transaction or sale of goods. Such contributions discounted against the total project cost must be specified, itemised, costed and clearly indicated in the bid.**

The total price for this service must include all labour, travel, resources and material required for the proper execution of the work as described in the Scope of Works.

This price must be valid for a period of **90 days** from the date of closure of the bid for purposes of the tender evaluation and adjudication process.

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Per Portfolio of Evidence per student  
(Inclusive of all staff, disbursements, etc.)  
**(Estimated minimum portfolio's = 100).**

R \_\_\_\_\_

Value-Added Tax (15% VAT)

R \_\_\_\_\_

Grand Total

R \_\_\_\_\_

Are you registered in terms of sections 23(1) of 23(3) of the Value-added Tax act 1991 (Act No. 89 of 1991) (Please circle your answer)

YES              NO

If yes, provide your VAT registration number:

\_\_\_\_\_

Name of Company:

\_\_\_\_\_

Address:

\_\_\_\_\_

Telephone Number:

\_\_\_\_\_

Fax Number:

\_\_\_\_\_

Signature:

\_\_\_\_\_

Date:

\_\_\_\_\_

**CHANGES MADE BY BIDDER**

If the bidder wishes to make any changes to any of the bid conditions or specifications, or if he wishes to qualify his bid in any way, he must clearly set out his suggestions below. If he makes **ANY** changes and do not list them below, his bid will be disqualified.

If no changes or amendments are made, please indicate it below by writing **NONE** in the space below.

**NB. Any changes made by the bidder outside the scope of works, resulting in not meeting pre-qualifying conditions or compulsory subcontracting, may influence the functionality of the end product and may result in the bid being disqualified.**

Item	Suggested Change

If more space is required, please add a separate page.



### SCHEDULE: PROOF OF RELEVANT EXPERIENCE

The following is a summary of works that have been completed successfully by bidder. In order to be compliant for this bid, the following detail **MUST** be included:-

- **Supply at least three different references with contact numbers.**
- The description of work must be relevant to the nature of this contract.
- Elaborate on project description. For eg. do not state MODERATOR – Be specific as to the works executed in the contract to support relevant experience.
- **List references pertaining to training done for state-owned entities in South Africa**

Employer (include contact information)	Description	Value of Work	Completed

If more space is required, please add a separate page.

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## **SCHEDULE: DETAILED COMPANY PROFILE**

The contractor must attach to this page a DETAILED & COMPREHENSIVE company profile including core competencies of personnel.

In order for a company profile to be compliant for this bid, the following detail **MUST** be included in the company profile.

- Company core business activities – Describe your products and services and markets in which you operate
- Company background – State number of years in business, location, history of company, etc
- Company resources – Number of employees, core competencies of personnel, structure of company - organogram

If more space is required, please add a separate page.

## SCHEDULE: PROFESSIONAL REGISTRATION

Please attach to this page a copy of your current valid registrations with:-

- **Project Management South Africa (PMSA)**
- **Registration as assessor for Services SETA for NQF Level 4 - Project Management qualification SAQA ID 50080**
- **Registration as moderator for Services SETA for NQF Level 4 - Project Management qualification SAQA ID 50080**
- **Proof of registration as a ICDL consultant or ICDL test centre**

If more space is required, please add a separate page.

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Signature for <b>Casidra</b>		Signature for Contractor

## **SCHEDULE: PORTFOLIO**

- Please attach to this page a copy of your current portfolio of endorsed projects completed successfully with Services Seta

If more space is required, please add a separate page.

## SCHEDULE: COIDA

Please attach letter of good standing in terms of COIDA if applicable. If it not included, please provide evidence that there are no employees working for you.

If more space is required, please add a separate page.

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## **SCHEDULE: CV'S OF THE ASSESSOR AND MODERATORS**

Attach to this page detailed CV's of at least two assessors and two moderators

If more space is required, please add a separate page.



BID NO: 2021/01/HO

**CASIDRA (SOC) LTD HEAD OFFICE: SERVICES OF TRAINING ASSESSOR  
AND MODERATOR FOR NQF LEVEL 4 PROJECT MANGEMENT UNIT  
STANDARDS**

**SCOPE OF WORKS**

**1. PURPOSE / PROBLEM STATEMENT**

**Casidra** is a Western Cape Government implementation company (state-owned company), providing dedicated project management services and support to the Western Cape Department of Agriculture. Other clients include the Western Cape Department of Economic Development, and the National Department of Environmental Affairs. **Casidra** with a budgeted income of approximately R40 million per annum and an asset value of approximately R40 million.

**Casidra** is inviting service providers to provide **training assessor and moderating services** as part of its corporate plan. As part of this process, **Casidra** wishes to employ the services of **training assessor and moderator**, to work with the company for a 2-year period, commencing in 2021.

**2. SCOPE OF WORK / DELIVERABLES**

The scope of the **training assessor and moderator** function includes the points listed below, with a view to building and strengthening good governance. However, should any other function be regarded as imperative by the bidder, it should be added and clearly defined.

- The assessor and moderator function must, in consultation with and to be approved by the Human Capital Manager, meet the following requirements

**The Assessor**

- Plan and prepare assessments
- Conduct the assessments
- Provide feedback

**The Moderator**

- Ensuring that assignments and tests are carried out correctly and fairly
- Evaluating the performance of the Assessor

**The Assessor and Moderator**

- Internal control processes are fair, valid, and carried out correctly

- External control processes fair, valid and carried out correctly
  - Compliance with policies, regulations, and contracts with all Stakeholders
  - The safeguarding of Portfolio of Evidence and all documentation
  - The achievement of established operational goals and objectives; and
  - Compliance with laws, regulations, and controls.
- 
- It must co-ordinate with other internal and external providers of assurance to ensure proper coverage and minimal duplication of effort.
  - The assessor and moderator function must be available for External Moderation processes and Verification visits from the Services Seta.
  - Assist the Human Capital Coordinator: Training and Development in maintaining effective controls by recommending continuous improvement controls and developing recommendations for enhancement.
  - The assessor and moderator should ensure that evidence is current, suitable, sufficient, and authentic.

### **3. PERFORMING ASSESSOR AND MODERATOR ASSIGNMENTS**

#### **The Assessor**

- Plan for the assessment.
- Prepare for the assessment.
- Conduct the assessment according to established assessment principles and decide whether the candidate has met the required learning outcomes.
- Evaluate and judge the evidence.
- Record the assessment decision.
- Provide feedback.
- Complete all documentation and forward to the ETQA.
- Review the assessment process and provide feedback for improvement of internal processes if required.
- Comply with all ETQA requirements.

#### **The Moderator**

- Ensuring that assignments and tests are carried out correctly and fairly.
- Ensuring that the principles of quality assurance have been applied and maintained.
- Evaluating the performance of the Assessor

#### **The Assessor and Moderator**

- Internal control processes are fair, valid, and carried out correctly
- External control processes fair, valid and carried out correctly
- Compliance with policies, regulations, and contracts for all parties involved in the process
- The safeguarding of Portfolio of Evidence and all documentation
- Compliance with laws, regulations, and controls.

### **4. REPORTING**

The assessor and moderator function will report to the Human Capital department.

**END OF WORK TO BE DONE**



## FINANCIAL REGULATIONS SECTION 22

BID NO: 2020/01/HO

### PROFESSIONAL SERVICES: INTERNAL AUDITORS

#### FRAMEWORK AGREEMENT

#### SUPPLY CHAIN MANAGEMENT – PREFERENTIAL PROCUREMENT POLICY - EVALUATION CRITERIA

(PPP – EVALUATION CRITERIA)

#### ONLY FOR USE OF BIDS FROM R30 000 TO THE MAXIMUM VALUE OF R50 MILLION

**Casidra**, as a Schedule 3D development and implementation agent for the Western Cape Provincial Government underwrites, and complies with, the Provincial and National developmental initiatives and administers funds on behalf of donors. Within this context, and because of the specific requirements of the donors for the application of the funds, the awarding of bids are dependent on the special evaluation criteria as set out in the policies of **Casidra**. The evaluation criteria of this Preferential Procurement Policy is based on the “**Preferential Procurement Policy Framework (Act 5 of 2000)**” and related Regulations.

Awarding of the bid is dependent on a functional score as a condition of tender, preferential points system, and every presentation is measured against the specific evaluation criteria as shown. The completion and signature of the document is thus a pre-requisite to qualify as a service provider.

<b>GENERAL DETAILS:</b> <i>(Please print clearly)</i>	
Registered Company Name	
Trading Name / Individual Full Name	
Company Reg Number / ID Number	
VAT Number	
CSD Supplier Number *	
CSD Unique Registration Ref Number *	
Postal Address	



Postal Code			
Physical Address			
Postal Code			
<b>CONTACT DETAILS</b>			
Representative Name			
Telephone Number			
Cell Phone Number			
Fax Number			
Email Address			
Website Address			
<b>OTHER DETAILS</b>			
Main Business Type ( <i>Please tick</i> )		Consultants & Professionals	
Tools & Equipment (Hardware)		Clothing & Textiles	
Office Supplies & Furniture		Accommodation & Transport	
Training & Mentorship		Printing & Advertising	
Event Services (Catering, Venue Hire)		Irrigation & Water Services	
Earthmoving & Heavy Machinery		Other Production Inputs	
Seed, Fertilizer, Chemicals		Livestock & Animal Production	
Construction Services		Repairs & Maintenance	
Vehicles & Implements		Municipal & Bulk Services	
Other (Please Specify)			
* Note that you HAVE to register on the Central Supplier Database (CSD) ( <a href="http://www.csd.gov.za">www.csd.gov.za</a> ) before we can use you as a service provider.			

#### Sub-contracting

Excluding any subcontracting requirements as a condition of tender, as indicated in CBD 1, the following general condition apply:

A Maximum of 25% of the value of the contract may be subcontracted without proof of the subcontractor B-BEE status:

- unless with proof of a subcontractor with equal or better B-BBEE points
- unless the subcontractor is an exempted micro enterprise with the capacity and ability to execute the subcontract.

In event of the above, full disclosure by the contractor must be made in the bid documents to **Casidra** with full details on the subcontractor as well as proof of the capacity and ability of the subcontractor to execute the work. Subcontracting a portion of the tender, without disclosure and approval by **Casidra**, the Contractor can be penalised up to 10% of the value of the contract.

Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

If YES, indicate:

- (i) what percentage of the contract will be subcontracted? .....
- (ii) The name of the sub-contractor? .....
- (iii) The B-BBEE status level of the sub-contractor? .....
- (iv) Whether the sub-contractor is an EME? YES / NO (Attach B-BBEE certificate / an original sworn affidavit as proof)

Final points awarded to bid = (B) Price Max 80% + (C) B-BBEE Max 20%

#### Section A – Functional Requirements

Functional refers to: A service or product that is designed to be practical, useful, working or operating, taking into account factors like quality, reliability, viability, and durability and the technical capacity (time and resources) and ability (knowledge and skills) of the bidder to execute the works.

An offer that does not obtain the minimum score for each functionality criterion or the minimum weighted average for functionality as indicated, is not an acceptable tender. Is this bid subject to the evaluation of functional requirements? **YES** (**Casidra** to indicate)

If “YES”, the following criteria will be used for evaluation:

No	Evaluation criteria	Weight (A)	Score (B) 1= poor 5=excellent	Minimum score required	Total (A x B)
1	References of previous work (Contactable references)	30%	For office use	<b>4</b>	For office use
2	Experience of similar work including state owned entities	30%	For office use	<b>4</b>	For office use
3	CV's of the assessor and moderators - Experience	40%	For office use	<b>4</b>	For office use
TOTAL SCORE - A minimum score of <u>80</u> % is required for functional requirements for this bid to be considered for further evaluation				% = Total / 5	For office use

Functional Item	1 Poor: Non-compliant	2	3	4	5 Excellent: Fully compliant
References from clients on similar nature related previous work	No references or very poor rapport	Some minor problems experienced	Acceptable minimum standard of work	Recommended by references	Highly recommended

Experience of similar work	No experience	Limited exposure to work at hand	Not similar, but related	Similar work including state owned entities	High level similar work including state owned entities
CV's of the assessor and moderators	Assessors and moderators have individual experience of more than 0 to 1 years	Assessors and moderators have individual experience of more than 1 to 5 years	Assessors and moderators have individual experience of more than 5 to 10 years	Assessors and moderators have individual experience of more than 10 to 20 years	Assessors and moderators have individual experience of more than 20 years

Section B – Formula for Awarding of Price Points (Only to be considered if Section A has met the minimum requirement)

Unconditional discounts offered will be taken into account for determining the following point:

$$\text{Point} = 80 \left[ 1 - \frac{\text{Price} - P_{\min}}{P_{\min}} \right] \quad \text{where } P_{\min} \text{ is the lowest acceptable bid}$$

#### Section C – B-BBEE Contribution

An *EME* must submit a valid, originally certified and signed sworn affidavit (no Photostat copies of certification allowed) confirming annual turnover and level of black ownership or an affidavit issued by Companies Intellectual Property Commission (accounting officer for a Closed Corporation). If a start-up EME, a certificate issued by CIPC on the BEE status is accepted.

A ***QSE that is less than 51% (50% or less) black owned*** must be verified in terms of the QSE scorecard issued via Government Gazette and submit a **valid, original or a legible originally certified copy** of a B-BBEE Verification Certificate issued by SANAS.

A ***QSE that is at least 51% black owned (51% or higher)*** must submit a **valid, originally certified and signed sworn affidavit** confirming turnover and level of black ownership as well as declare its empowering status or an affidavit issued by Companies Intellectual Property Commission.

A ***large enterprise*** must submit a **valid, original or originally certified copy** of a B-BBEE Verification Certificate issued by a verification agency accredited by SANAS.

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.

A **trust, consortium or joint venture** (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE status level verification certificate for every separate tender.

**Tertiary institutions and public entities** will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

Bids of non-compliant contributors (no certificate) will be considered, but no points will be awarded for B-BBEE status.

The generic threshold for EME are R10 million, but depending on the sector, the threshold as set in the BEE charter for that sector will apply. (Tourism R2.5mill and Construction R1.5 mill)

B-BBEE Status level of contributor	Number of points	Points awarded	BEE recognition level
1	20	EME & QSE 100% Black owned For office use	135%
2	18	EME & QSE 51% + Black owned For office use	125%
3	14	For office use	110%
4 and EME	12	EME 51% < Black owned For office use	100%
5	8	For office use	80%
6	6	For office use	60%
7	4	For office use	50%
8	2	For office use	10%
Non-compliant contributor	0	For office use	0%

#### Market related pricing

If the bidder, whose tender has been compliant, and that received the highest overall points, do not offer a market related price, the offer may be negotiated with that bidder to be market related.

Are you willing to negotiate your offer? YES / NO (delete which is not applicable)

If a market related price cannot be negotiated, the offer for negotiation will be extended to the second highest point scoring bidder, then the third highest scoring bidder, where after, failing to reach any agreement, the tender will be cancelled.

#### Declaration of interest and Bidders past supply chain management practices

In terms of section 21 of the CPBD **2.2** Conditions of Tender document:

Are any family member, trustee, director, shareholder or member of the bidder in any way connected to the State?

and/or

Do any potential conflict of interest exist, where the public duties (like being part of an approval or adjudication process) and private interests of the bidder, could improperly influence or lend inside trading information to the bidder?

and/or

Do the bidder have any relationship with a person that may be involved with the evaluation or adjudication of this bid? In view of possible allegations of favouritism, it is required that the bidder declare his/her position in relation to the Client.

If so, furnish particulars:

.....  
 .....  
 .....  
 .....

The bid may be disregarded if that bidder or its directors have abused the Client's supply chain management system, committed fraud or any other improper conduct in relation to such system.

- (i) Is the bidder or any of its directors;
  - listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? ([www.treasury.gov.za](http://www.treasury.gov.za), follow the link at the bottom of the home page);
  - Listed on the register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act;
- (ii) Was the bidder or any of its directors;
  - convicted by a court of law (including a court outside of the RSA) for fraud or corruption during the past five years?
  - contract with any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?
- (iii) The contractor is not known to be insolvent, in receivership, bankrupt or being wound up, or has its affairs administered by a court or a judicial officer, has suspended its business activities, or is subject to legal procedures in respect of any of the foregoing.

If so, furnish particulars:

.....  
 .....  
 .....  
 .....

#### Section D – Designated Sectors – Local Content

The following sectors in this bid are subject to a stipulated minimum threshold for local production and content:

Sector	Minimum Threshold (%)
NOT APPLICABLE	

If Section D is applicable, **Form SBD 6.2** must be completed and signed as well as **Annex C Local Content Declaration – Summary Schedule**, and must be handed in as part of the bid documentation.

## IMPORTANT NOTES

**Casidra** reserves the right to:

- disregard any bids where the declaration (below) has not been signed;
- change the point system of the policy without prior notification;
- negotiate prices based on market related pricing before award of the bid;
- disclose the results of the points awarded on request;
- evaluate and award points according to the documentation supplied and evaluate functionality at its own discretion;
- award the bid to the qualifying Contractor with the highest number of points scored, unless the prices are not market related or on the basis of objective criteria stated in the tender documents, like fairness, safety, public interest and international suppliers;
- to award the bid to a Contractor which does not necessarily have the lowest price.

Other Notes:

- Final points scored will be rounded off to the nearest 2 decimal places
- In the event of equal scores, the offer with the highest B-BBEE score will be successful. If scores are still equal, and where functionality is part of the bid, the offer with the highest functionality score will be successful. If the scores are still equal, the drawing of lots will determine the outcome.

The bid may be cancelled if:

- all the bid offers received are higher than R50 million;
- circumstances change and there is no longer a requirement for this service;
- funds are no longer available or if there are insufficient funds available in the budget for the work;
- no acceptable bids and/or market related prices are received;
- there is a material irregularity in the tender process;
- false information were supplied by the bidder.

Cancellation of bid will be placed in the same media as initially advertised.

Bids which are suspected to have supplied false information will be subjected the *alteram partem* rule. If proven that false information was supplied, disqualify the tender or terminate the contract, without payment and/or claims for damages incurred by such cancellation.

The Contractor will be liable for the recovery of all costs and damages suffered as a result of the misconduct or cancellation of the bid or less favourable conditions affecting the award of the bid.

Exclusion of the Contractor and its directors, who acted fraudulently, from any business with an organ of state for a period not exceeding 10 years after has been applied.

Declaration by the company submitting the bid:

I, \_\_\_\_\_

as the authorised representative of the company / CC / business hereby declare that, to the best of my knowledge the abovementioned information is true and correct and that I am duly authorized

as a signatory of this bid. On behalf of my business I accept the terms and conditions as set out in this document. I will supply documentary proof of any information supplied herein on request and to the satisfaction of **Casidra**.

In terms of the POPI Act I further give consent that my contact and company details as will be captured on the **Casidra** database may be shared with the role players/funders involved in the project and be used by **Casidra** for the purpose of further procurement.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## SUPPLY CHAIN PERFORMANCE MEASUREMENT

In order for **Casidra** to measure its supply chain efficiency and effectiveness, please assist us by answering the following questions:

- What were the source that made you became aware of this bid being available.

Mark with X

Personal Email invite to bid:	
Via a friend or business partner:	
National Government E-Tender website:	
Local Newspapers:	
<b>Casidra</b> own website:	

Other:

Specify.....

- Was the time allowed to date of closure sufficient for you to compile an offer?

No – too short	Yes – Sufficient	No - Too long
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## BANK ENTITY FORM

1. DETAILS OF COMPANY / INDIVIDUAL: (Please print clearly)	
Full Name	
ID Number	
Company Reg Number	
VAT Number	
Postal Address	
Postal Code	
Physical Address	
Postal Code	
2. BANKING DETAILS	
Name of Bank	
Name of Branch	
Branch Code	
Account Number	
Type of Account	
3. CONFIRMATION BY BANK	
We hereby confirm that the bank details under paragraph 2 of this form belongs to the individual / company under paragraph 1.	
Date Stamp of Bank	BANK OFFICIAL
	Print Name:
	Signature: