

INDEPENDENT DEVELOPMENT TRUST



INVITATION OF BUILT ENVIRONMENT PROFESSIONALS TO ESTABLISH PANELS OF CONSULTANTS FOR THE INDEPENDENT DEVELOPMENT TRUST FOR ALL REGIONS/PROVINCES

EXPRESION OF INTEREST

REF NO.: IDT-NATIONALPANELS-PSP-2022

PREPARED BY:

Independent Development Trust

Cnr Oberon and Sprite Street
Faerie Glen
0001

SCM / Technical Enquiries

E-mail: IDTNTPanel@idt.org.za

BIDDER:

PROFESSIONAL DISCIPLINE:

CSD NO:

TEL:

EMAIL ADDRESS:

Please Tick the province where you have Head Office or Branch

Eastern Cape	<input type="checkbox"/>	Free State	<input type="checkbox"/>	Gauteng	<input type="checkbox"/>	KwaZulu Natal	<input type="checkbox"/>		
Mpumalanga	<input type="checkbox"/>	Limpopo	<input type="checkbox"/>	Northern Cape	<input type="checkbox"/>	North West	<input type="checkbox"/>	Western Cape	<input type="checkbox"/>

Bid Document to Procure Professional Services. This document contains the Term of Reference, the Bid Data, the Returnable Documents and Special Condition of Bid

Contents

PART T1: BIDDING PROCEDURES.....	1
T1.1 TENDER NOTICE AND INVITATION TO SUBMIT PROPOSALS	2
T1.2 BID DATA	5
T1.2.1 Background	5
T1.2.2 Bid Details	6
<i>Bid Data (including special conditions of Bid)</i>	6
T1.2.3 Evaluation Procedure	9
PART T2: RETURNABLE DOCUMENTS.....	13
PART T2.A RETURNABLE SCHEDULE.....	14
T2.A1 AUTHORITY TO SIGN A BID	15
T2.A2 FIRM'S COPY OF REGISTRATION OF INCORPORATION OR COMPANY REGISTRATION DOCUMENTS	18
T2.A3 NOTARISED JOINT VENTURE AGREEMENT OR CONSORTIUM AGREEMENT WHERE APPLICABLE	19
T2.A4 PROFESSIONAL REGISTRATION OF AT LEAST ONE DIRECTOR PROFESSIONALLY REGISTERED AS PR OR PR TECHNOLOGIES WITH THE RELEVANT BUILT ENVIRONMENT COUNCIL	20
T2.A5 VALID PROFESSIONAL INDEMNITY INSURANCE DOCUMENTS	21
T2.A6 VALID COIDA OR LETTER GOOD STANDING WITH THE DEPARTMENT OF LABOUR (SOLE PROPRIETOR WITHOUT EMPLOYEES ARE EXPECTED TO SUBMIT FROM THE DOL A TENDER LETTER FOR A SOLE PROPRIETOR)	22
T2.A7 SBD 1 INVITATION TO BID.....	23
T2.A8 SBD 4 BIDDER'S DISCLOSURE	25
T2.A9 SBD 6.1 PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017	27
T2.A10 CONFIRMATION OF RECEIPT OF ADDENDA TO BID DOCUMENTS	31
PART T2.B TECHNICAL RETURNABLE DOCUMENTS	32
T2.B11 FIRM'S EXPERIENCE ON EXECUTION OF PROJECTS.....	33
T2.B12.1 A EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS PROJECTS REFERENCES	35
T2.B12.2 B EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS PROJECTS REFERENCES	36
T2.B12.3 C EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS PROJECTS REFERENCES	37
T2.B13 EVALUATION SCHEDULE: KEY PERSONNEL ASSIGNED TO THE WORK	38
T2.B14 KEY PERSONNEL: CURRICULUM VITAE OF KEY PERSONNEL – KEY RESOURCE	39
T2.B15 EXPERIENCE OF PROJECT TEAM AND DELIVERABLES	40
T2.B16 COMPANY LOCALITY (10 POINTS).....	41
PART C1: CONTRACT.....	42
C1.1 Bid CONTRACT DATA	42
PART C2: PRICING DATA.....	44
C2.1 PRICING INSTRUCTIONS	44
C2.2 TYPING, PRINTING AND DUPLICATING WORK AND FORWARDING CHARGES.....	44
C2.3 TRAVELLING AND SUBSISTENCE ARRANGEMENTS AND TARIFFS OF CHARGES	44
PART C3: SCOPE OF SERVICES	46
C3.1 PROFESSIONAL SERVICE PROVIDER'S OBJECTIVES	46
C3.2 GENERAL REQUIREMENTS	46
C3.2.1 Services	46
C3.2.2 Location	46
C3.2.3 Project Programme	46
C3.2.4 Reporting Requirements and Approval Procedure	47
C3.2.5 Safety.....	47
C3.3 SOFTWARE APPLICATION FOR PROGRAMMING	47
C3.4 USE OF REASONABLE SKILL AND CARE	47
C3.5 COMPLIANCES WITH STANDARDS AND REGULATIONS	47
C3.6 INDICATIVE SCOPE OF WORK	48
PART C4: NOTES TO BIDDERS	49

Part T1: BIDDING PROCEDURES



Independent Development Trust

REF NO: IDTNT-PANEL 2022-2025

T1.1 Tender Notice and Invitation to Submit Proposals

A CALL FOR PROFESSIONAL SERVICE PROVIDERS IN THE BUILT ENVIRONMENT TO SUBMIT EXPRESSIONS OF INTEREST TO BE ON A PRE-APPROVED PANEL OF PROFESSIONAL SERVICE PROVIDERS FOR THE IDT IN ALL PROVINCES OF SOUTH AFRICA FOR A PERIOD OF 36 MONTHS

The Independent Development Trust (IDT) in all the provinces of South Africa (SA) hereby calls for Expression of Interest from suitably qualified and experienced service providers from the built environment professions to establish pre-approved panels of Professional Service Providers (PSPs) for infrastructure projects in SA to be utilised for a period of 36 months. The following categories of professional service providers are invited:

1. Project Managers;
2. Quantity Surveyors;
3. Architects;
4. Civil Engineers
5. Structural Engineers;
6. Electrical Engineers;
7. Mechanical Engineers; and
8. Health and Safety Consultants.

Only PSP with at least one director professionally registered as Pr or Pr Technologies with the relevant Built Environment Council are eligible to submit expressions of interest. **Entities with multi-disciplinary services must submit individual bids per discipline**, failure to indicate the professional discipline in which you undertake to participate in, will lead to immediate disqualification.

EOI will be evaluated in terms of the Mandatory Requirements and Generic Functionality Criteria as follows:

PHASE ONE - MANDATORY REQUIREMENTS / DOCUMENTATION

Bidders are expected to submit the following compulsory documentation. Failure to comply with all requirements will result in automatic disqualification.

1. Authority to Sign this Bid
2. Company Registration Documents (CIPC) or affidavit and a trade name if a Sole Proprietor
3. Notarised Joint Venture Agreement or Consortium Agreement where applicable
4. Professional registration of at least one director professionally registered as Pr or Pr Technologies with the relevant Built Environment Council (ECSA, SACAP, SACPCMP and SACQSP).
5. Valid professional Indemnity
6. Valid COIDA or Letter Good Standing with the Department of Labour (Sole Proprietor without employees are expected to submit from the DOL a **Tender Letter** for a Sole Proprietor)
7. SBD 1 Invitation to Bid
8. SBD 4 Declaration of Interest
9. SBD 6.1 PPPFA regulations claim form
10. Confirmation of addendum

PHASE TWO – FUNCTIONALITY CRITERIA

Functionality Criteria		Points Allocation	
A1	Experience of the company on previous projects	45	45
B1	Professional registration with the relevant profession	10	45
B2	Qualifications of the key assigned personnel	15	
B3	Experience of Key assigned personnel more than 10 years of experience	20	
C	Locality of the firm's office	10	10
TOTAL POINTS			100

Only bidders that score 70 points as minimum functionality threshold will qualify to be in the panel of consultants for a period of 36 months.

Tender documents must be downloaded from IDT website and National Treasury e-tender on the following link: http://www.idt.org.za/business_opportunities/current-tenders and www.treasury.gov.za

All Enquiries may be addressed in writing to **IDTNTPanel@idt.org.za** by no later than **24th October 2022 at 17H00**. The IDT response to bidders will be not later than EOB the **26^h October 2022**

Bids must be submitted on the original documentation that is issued by IDT and delivered at the following address:

IDT National Office

Cnr Oberon & Sprite Street
Faerie Glen
0043

The closing time to receive Bids is Monday, **31th October 2022 at 12:00**.

Telegraphic, telephonic, telex, facsimile, e-mail and late Bids **WILL NOT** be accepted.

CONTACT DETAILS

All bidders must furnish the following particulars and include it in their submission

Discipline:

Name of bidder:

Trading Name

VAT registration number

Tax Clearance Certificate submitted

YES / NO

Postal address:

Street address:

Contact Person

Telephone number:

CodeNumber

Cellular number:

Facsimile number:

CodeNumber

e-Mail address:

T1.2 BID DATA

T1.2.1 Background

IDT is a Schedule 2 Public Entity governed by the PFMA and other applicable legislative frameworks as well as its Deed of Trust. The organization is accountable to Parliament through the Minister of Public Works who is the Executive Authority.

The mandate of the IDT is to support and add value to the development agenda of government as indicated in the mission statement; ("The IDT, together with strategic partners, will enable poor communities to access resources, recognize and unlock their own potential and continuously improve their quality of life"). In pursuit of this mandate, the IDT primarily operates as a strategic partner in the management, integration and implementation of certain government development programmes.

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

Copy of IDT's last Annual Report is available on request. Additional information with regards to the structure and functional activities of IDT can be obtained from IDT website (www.idt.org.za).

The Independent Development Trust (IDT) has been appointed as the Implementing Agent by various National and Provincial Department Clients to implement Social Infrastructure Service Delivery Programs, these includes but not limited to School Building Programme, Water and Sanitation, Fencing Programme, Special Schools Programme and Alternative Construction Methodology Programmes utilizing conventional methods, however Alternative Building Technologies (ABTs) could be considered on client request or sites with no access to deliver the materials.

The IDT invites suitable qualified professional consultants from various disciplines (Project Managers, Architects, Quantity Surveyors, Civil & Structural Engineers, Electrical Engineers, Mechanical Engineers and Health and Safety), wishing to be on IDT panel of PSPs for undertaking of infrastructure related works in one to all Provinces of SA. to submit proposals for expression of interest. The request for quotation will be issued to service providers on this panel as and when projects are allocated to the IDT.

The panel will be valid for 36 months and will be subject to budget and project availability.

T1.2.2 Bid Details

Bid Data (including special conditions of Bid)

The conditions of bid are the Standard Conditions of Bid as contained in the CIDB Standard for Uniformity in Construction Procurement (August 2019). This standard is issued in terms of sections 4(f), 5(3)(c) and 5(4)(b) of the Construction Industry Development Board Act 38 of 2000 read with Regulation 24 of the Construction Industry Development Regulations, (as amended) issued in terms of section 33 refer to www.cidb.org.za.

The Standard Conditions of Bid make several references to the Bid Data for details that apply Specifically to this bid. The Bid Data shall have precedence in the interpretation of any ambiguity or Inconsistency between it and the Standard Conditions of Bid. Each item of data given below is cross-referenced to the clause in the Standard Conditions of Bid to which it mainly applies.

Clause number	Bid Data
F.1.1	The employer is Independent Development Trust
F.1.2	<p>The Bid Documents issued by the Employer comprise the following documents:</p> <p>Volume 1 - THE BID</p> <p>Part T1: Bidding procedures T1.1 - Bid notice and invitation to bid T1.2 - Bid Data</p> <p>Part T2: Retournable documents T2.1 - List of returnable documents T2.2 - Returnable schedules</p> <p>Volume 2 - THE CONTRACT</p> <p>Part C1: Contracts and Contract data C1.1 - Form of offer and acceptance C1.2 - Contract data C1.3 - Performance Bond</p> <p>Part C2: Pricing data C2.1 - Pricing instructions</p> <p>Part C3: Scope of work C3 - Scope of work</p> <p>Part C4: Site information C4 - Site information</p>
F.1.4	The employer's agent will be confirmed if your company is appointed for projects.

F.2.1	<p>Bidders are expected to submit the following compulsory documentation. Failure to comply with all requirements will result in automatic disqualification.</p> <ol style="list-style-type: none"> 1. Authority to Sign this Bid 2. Company Registration Documents (CIPC) or affidavit and a trade name if a Sole Proprietor 3. Notarised Joint Venture Agreement or Consortium Agreement where applicable 4. Professional registration of at least one director professionally registered as Pr or Pr Technologies with the relevant Built Environment Council (ECSA, SACAP, SACPCMP and SACQSP). 5. Valid professional Indemnity 6. Valid COIDA or Letter Good Standing with the Department of Labour (Sole Proprietor without employees are expected to submit from the DOL a Tender Letter for a Sole Proprietor) 7. SBD 1 Invitation to Bid 8. SBD 4 Declaration of Interest 9. SBD 6.1 PPPFA regulations claim form 10. Confirmation of addendum
F.2.3	Alternative offers are not applicable.
F.2.4	Parts of each bid offer communicated on paper shall be submitted as an original.
F.2.5	<p>The employer's details and address for delivery of bid offers and identification details that are to be shown on each bid offer package are:</p> <p>Location of bid box: Reception: Independent Development Trust in all regional offices as follows:</p> <p>IDT National Office Cnr Oberon & Sprite Street Faerie Glen 0043</p>
F.2.5.1	<p>Bid reference number: BID No. IDTNT-PANEL 2022-2025</p> <p>Title of Bid: PROFESSIONAL SERVICE PROVIDERS IN THE BUILT ENVIRONMENT TO SUBMIT EXPRESSIONS OF INTEREST TO BE ON A PRE-APPROVED PANEL OF PROFESSIONAL SERVICE PROVIDERS IN ONE TO ALL PROVINCES FOR THE IDT FOR A PERIOD OF 36 MONTHS</p> <p>Closing date: 31 October 2022 Closing time of the bid: 12:00.</p>
F.2.6	A two-envelope procedure is not required.
F.2.7	Telephonic, telegraphic, telex, facsimile, e-mailed and late bid offers WILL NOT be accepted.
F.2.8	The closing time for submission of bid offers is as stated in the Bid Notice and Invitation to Bid.
F.2.9	The bid offer validity period until panels are completed
F.3.1	Bids will not be opened in public

F.3.2.2	Quality / functionality / technical evaluation will be applicable please refer to T1.2.3 for details.
F.3.3.1	The employer reserves the right to award the contract in whole or in part to the successful bidder or not to award the bid at all.
F.3.4	The number of paper copies of the signed contract to be provided by the employer is one.
F.4	<p>NOTES</p> <p>Appointments for projects will be as and when required and will be dependent on project and budget availability. PSPs who qualify to be in the panel can be invited to respond to projects specific bidding for price in line with project scope, complexity and value in accordance with the IDT SCM Policy. A second appointment letter will be provided for actual allocation of works.</p> <p>The full bid document must be filled with ink.</p> <p>Packaged proposals to render more than one service will not be accepted.</p> <p>Applicants are however free to submit separate proposals for any discipline they wish to be involved in provided they meet the required criteria.</p> <p>If applicants chose to bid for more than one discipline, they are required to submit EXPRESION OF INTEREST for each discipline they intend to bid for.</p> <p>Upon allocation of works you will be required to submit a Professional Indemnity covering the allocated works or twice your estimated fees, whichever is the highest and conclusion of the applicable Client/ Consultant Agreement CIDB Standard Professional Services Contract 3rd Edition of CIDB document 1014 (or latest version at appointment), together with the IDT addendums and any other special conditions of contract.</p> <p>Upon allocation of works applicants are to ensure that they have adequate resources to undertake the work under stringent timeframes.</p> <p>Upon allocation of works the bidders are required to take cognizance of the role of the other professionals that might be involved on the project.</p> <p>Upon allocation of works the IDT reserves the right to ask tenderers to replace any member/s of the proposed team if they do not meet the IDT requirements.</p>
	<p>Allocation of Bidders to the Relevant Province</p> <p>Successful Bidder will be allocated to the database of National PSP panel and categorised as follow:</p> <ul style="list-style-type: none"> • per Discipline; and • to the relevant province depending of the proven evidence of bidders Head Office and/or branch office. On this regard the evidence will be consider upon submission of documentation as indicated under returnable document T2.B16

T1.2.3 Evaluation Procedure

Bid evaluation will be conducted as per the stages below:

Stage 1: Eligibility of Bidders

Stage one (1) entails the process of ensuring compliance of the bidders. Bidders shall submit all mandatory returnable documents to qualify for stage two (2) of the evaluation processes. Failure to submit any of the compulsory returnable documents will lead to disqualification.

Table 1 lists the compulsory returnable documents that shall be submitted by all bidders to be considered eligible for this bid. Certified copies of documents shall be submitted in original and not older than 6 months from the closing date.

Table 1: List of Returnable Compulsory Documents

1. Authority to Sign this Bid
2. Company Registration Documents (CIPC) or affidavit and a trade name if a Sole Proprietor
3. Notarised Joint Venture Agreement or Consortium Agreement where applicable
4. Professional registration of at least one director professionally registered as Pr or Pr Technologies with the relevant Built Environment Council (ECSA, SACAP, SACPCMP and SACQSP).
5. Valid professional Indemnity
6. Valid COIDA or Letter Good Standing with the Department of Labour (Sole Proprietor without employees are expected to submit from the DOL a **Tender Letter** for a Sole Proprietor)
7. SBD 1 Invitation to Bid
8. SBD 4 Declaration of Interest
9. SBD 6.1 PPPFA regulations claim form
10. Confirmation of addendum

Stage 2: Evaluation on Functionality/Technical Requirements

Stage two (2) entails the process of evaluation of functionality/technical requirements. Only bidders who meet the threshold of 70% (70 points) and above of the total functionality/quality points will be eligible to be in the panel.

Table 2 below, specifies in detail the functionality/technical criteria to be considered under the evaluation.

Table 2: Summary of Functionality / Quality Criteria

Functionality Criteria		Points Allocation	
A1	Experience of the company on previous projects	45	45
B1	Professional registration with the relevant profession	10	45
B2	Qualifications of the key assigned personnel	15	
B3	Experience of Key assigned personnel more than 10 years of experience	20	
C	Locality of the firm's office	10	10
TOTAL POINTS			100

A. EVALUATION SCHEDULE: FIRM'S EXPERIENCE (45 points)

A schedule of **completed** contracts of diverse nature (discipline bidding for) in relation to building construction works. The following details **must** be included in the schedule and to score points bidders are required to submit Letters of Appointment and Reference Letter or form **(T2.11 & T2.12)** signed by the client related to the specific projects.

The Reference Letter should include the following information:

- Full description of the project
- Service rendered (Stages involved)
- Name of Employer / client and their representative contact details (Full Name/Emails/Telephone)
- Cost of the works
- Project Commencement date
- Completion Date of
- Duration of the project

A1 - Evaluation sub-criteria: Firm's Experience on Similar Projects (45 points)		
Sub Criteria	Category	Points Awarded
Bidder has executed and completed at least 3 projects to the value of R80m and above each, from Stage 1 – 6, from Stage 1 to 6 and supported by contactable references (15 points per project)	Very Good	45
Bidder has executed and completed at least 3 projects to the value of R40 - R79m from Stage 1 to 6 and supported by contactable references (11 points per project)	Good	33
Bidder has executed and completed at least 3 projects to the value of R20m – R39m from Stage 1 to 6 and supported by contactable references (7 points per project)	Fair	21
Bidder has executed and completed at least 3 projects to the value of R1m – R19m from Stage 1 to 6 and supported by contactable references (4 points per project)	Poor	12
No submission	Not submitted	0

B. EVALUATION SCHEDULE: KEY PERSONNEL (45 points)

Provide information on the individuals with qualifications, skills and experience of at least one key resource:

- Relevant Qualifications (bidders are to include copies of the relevant qualifications of key individuals signed by the owner of the qualification)
- Relevant registration with professional bodies (bidders are to include copies of the relevant registration certificates of individuals signed by the owner of the professional registration)
- Detailed CV's for each member of the team noting their specific post registration relevant project experience, **project description, role and responsibility and project value**. Refer to Returnable document **(T2B13, T2B14 and T2B15)**

B1 _ Evaluation sub-criteria: Professional Registration of key personnel (10 points)				
Name of Proposed Key Personnel	Professional Registration (10 points)			
	Professional (Project Manager, Quantity Surveyor, Architect, OHS Agent or Engineers etc.)	Professional Technologist (Architects, OHS Manager or Engineer etc.)	Candidates professional category	Not registered
Key Resource	10	5	0	0
B2 _ Qualifications of proposed key personnel (15 points)				
Name of Proposed Key Personnel	Qualification within the construction environment profession (15 points)			
	Master's Degree (NQF L-8 or above)	Bachelor of Degree (NQF L-7)	National Diploma (NQF L-6)	Not submitted
Key Resource	15	12	6	0
B3 _ Evaluation sub-criteria: Experience of proposed key personnel (20 points)				
Name of Proposed Key Personnel	Experience of proposed key personnel (20 points)			
	Between 1 - 4 Years	Between 5 - 6 Years	Between 7 - 9 Years	10 Years and above
Key Resource	4	7	13	20

C. LOCALITY (10 POINTS)

Points allocated for proof of residence of company head office and/or branch/operational office located in any of the provinces. Verifiable Water, Electricity or Levy account in the name of the company/firm. Lease agreement accompanied by Landlord affidavit. Failure to submit will result in zero points. Bidder to tick or put a cross for regions bidding for.

Criteria	Points
Head office based location	7
Branch/operational office	3
No office	0

Office Location	Head Office	Branch/Operational Office
Eastern Cape		
Free State		
Gauteng		
Kwa-Zulu Natal		
Limpopo		
Mpumalanga		
Northern Cape		
North-West		
Western Cape		

Only bidders who will obtain a 70% (70 points) minimum functionality threshold will qualify to be in the panel for a period of 36 months.

When inviting for RFQ, the following aspects will be considered but not limited to:

Topic	Description / Requirements
--------------	-----------------------------------

Nature of the works and services required	<p>Scope of works and services will be defined</p> <p>Depending of the nature of the works and services required, the prequalification criteria will be based on the Category of works as defined by the relevant professional body. i.e the preselection will be in terms of the relevant Pr category of at least one of the directors (Pr, Pr Technology or Pr Technician)</p>
Financial proposal	<p>The IDT will have the right and discretion to reject a financial proposal with unreasonable fees discounts which may pose a risk to the project. Bidders should ensure that the financial proposals are aligned to the allocation of resources to the project.</p> <p>If a professional fee discount is proposed, bidders will be required to substantiate their financial proposal indicating professional level of human resources, time allocation and the remuneration rate related to the specific project and aligned to the proposed methodology.</p>
Professional Identity	Valid Professional Identity Cover in relation to the value of works
Interview of the Key Resources	The employer may contact the key resources allocated to the project to confirm their engagement with the bidder.
CIDB Standard for Developing Skills (SDS)	<p>In applicable, Compliance with the Standard for Developing Skills (SDS) as per the government gazette 36760 of CIDB will be required.</p> <p>The client will allocate a provisional amount to cover the cost for the SDS, which may be adjusted during implementation of the project in compliance with gazette.</p>
TAX compliance	Submission of TAX Pin for verification by employer
CSD	CSD Report
Letter of Good Standing	Valid COIDA / FEM / Tender Letter Form from DOL
SDB Form	SDB 1, SDB 4, SDB 6.1

Part T2: RETURNABLE DOCUMENTS

T2.A “Compulsory Commercial Documents”

Compulsory Commercial Documents shall be submitted by the bidders. If any of the below documentation is not supplied will lead to the immediate disqualification of the bidder. Certified copies of documents shall be submitted in original and not older than 6 months from the tender closing date.

Item	Description of Compulsory Returnable Document	Yes /No
T2.A1	Authority to Sign this Bid	
T2.A2	Company Registration Documents (CIPC) or Affidavit and trade name if a Sole Proprietor	
T2.A3	Notarised Joint Venture Agreement or Consortium Agreement where applicable	
T2.A4	Professional registration of at least one director professionally registered as Pr or Pr Technologies with the relevant Built Environment Council (ECSA, SACAP, SACPCMP and SACQSP).	
T2.A5	Valid professional Indemnity	
T2.A6	Valid COIDA or Letter Good Standing with the Department of Labour (Sole Proprietor without employees are expected to submit from the DOL a Tender Letter for a Sole Proprietor)	
T2.A7	Fully completed and signed SBD1: Invitation to bid	
T2.A8	Fully completed and signed SBD4: Bidder's Disclosure	
T2.A9	Fully completed and signed SBD 6.1 PPPFA regulations claim form	
T2.A10	Confirmation of Receipt of Addenda to Bid Documents (if applicable)	

T2.B List of other documents including Technical Returnable Documents

The technical returnable documents are required for bid evaluation purposes (Note: If any of the below is not supplied, it will result in the bidder not scoring points for such documents)

The table below lists other documents required including those required for technical returnable documents that should be submitted by the bidders.

TECHNICAL RETURNABLE DOCUMENTS		Yes /No
T2.B11	Experience of company on similar projects	
T2.B12.1 TO T2.B12.3	Evaluation schedule: experience on previous projects references	
T2.B13	Key personnel assigned to the project: Qualification, Experience and Professional registration	
T2.B14	Key personnel: Curriculum Vitae of key personnel – Key Resource	
T2.B15	Experience of project team and deliverables	

Part T2.A RETURNABLE SCHEDULE

Important note to Bidder: The relevant supporting documents to the organisation bidding i.e. Registration Certificates for Companies, Close Corporations and Partnerships, or Contracts and Powers of Attorney were applicable, or ID documents for Sole Proprietors, all as referred to in the foregoing forms listed in Part T2.A, must be inserted here

INSERT HERE

T2.A1 AUTHORITY TO SIGN A BID*Fill in the relevant portion applicable to the type of organisation***A. COMPANIES**

If a Bidder is a company, a certified copy of the resolution by the board of directors, personally signed by the chairperson of the board, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is before the closing time and date of the bid

AUTHORITY BY BOARD OF DIRECTORS

By resolution passed by the Board of Directors

On.....20.....

Mr/Mrs..... (Whose signature appears below) has been duly authorised to sign all documents in connection with this bid on behalf of

(Name of Company)

IN HIS/HER CAPACITY AS:

SIGNED ON BEHALF OF COMPANY:
(PRINT NAME)

DATE:

B. SOLE PROPRIETOR (ONE - PERSON BUSINESS)

I, the undersigned.....
hereby confirm that I am the sole owner of the business trading as

.....

.....

DATE

C. PARTNERSHIP

The following particulars in respect of every partner must be furnished and signed by every partner:

We, the partners in the business trading as.....

hereby authorise

to sign this bid as well as any contract resulting from the bid and any other documents and correspondence in connection with this bid and /or contract on behalf of

Full name of partner	Residential address	Signature	Date

D. CLOSE CORPORATION

In the case of a close corporation submitting a bid, a certified copy of the Founding Statement of such corporation shall be included with the bid, together with the resolution by its members authorising a member or other official of the corporation to sign the documents on their behalf.

By resolution of members at a meeting on 20..... at

Mr/Ms....., whose signature appears below, has been authorised to sign all documents in connection with this bid on behalf of (Name of Close Corporation)
.....

.....

SIGNED ON BEHALF OF CLOSE CORPORATION:
(PRINT NAME)

IN HIS/HER CAPACITY AS:..... **DATE:**

SIGNATURE OF SIGNATORY:.....

E. CO-OPERATIVE

A certified copy of the Constitution of the co-operative must be included with the bid, together with the resolution by its members authoring a member or other official of the co-operative to sign the bid documents on their behalf.

By resolution of members at a meeting on 20..... at

.....

Mr/Ms....., whose signature appears below,
has been authorised to sign all documents in connection with this bid on behalf of (Name of co-
operative).....

SIGNATURE OF AUTHORISED REPRESENTATIVE/SIGNATORY:

.....

IN HIS/HER CAPACITY

AS:.....

DATE:

SIGNED ON BEHALF OF CO-OPERATIVE:.....

NAME IN BLOCK LETTERS:.....

F. CERTIFICATE OF AUTHORITY FOR JOINT VENTURES

This Returnable Schedule is to be completed by EACH member of a joint venture submitting a bid.

We, the undersigned, are submitting this bid offer in Joint Venture and hereby authorise
Mr/Ms.....,
authorised signatory of the Company.....
acting in the capacity of lead JV partner, to sign all documents in connection with the bid offer
and any contract resulting from it on our behalf as a joint venture.

NAME OF JV ORGANISATION:.....

ADDRESS:.....

.....

DULY AUTHORISED SIGNATORY NAME

DESIGNATION:.....

SIGNATURE**DATE:**.....

**T2.A2 FIRM'S COPY OF REGISTRATION OF INCORPORATION OR COMPANY
REGISTRATION DOCUMENTS**

Attached hereto is my / our copies of company registration of incorporation or company registration documents. My failure to submit the copy with my / our bid document will lead to the conclusion that I am / we are not registered as claimed and our bid will be disqualified

(Attach the Firm's Copy of Registration of Incorporation or Company Registration Documents Here)

**T2.A3 NOTARISED JOINT VENTURE AGREEMENT OR CONSORTIUM AGREEMENT
WHERE APPLICABLE**

Attached hereto is a signed certified copy of our notarised Joint Venture Contract. Our failure to submit the copy with our bid document will lead to the conclusion that there is no joint venture contract, and as such, our bid will be disqualified

(Attach the notarised joint venture contract here)

**T2.A4 PROFESSIONAL REGISTRATION OF AT LEAST ONE DIRECTOR
PROFESSIONALLY REGISTERED AS PR OR PR TECHNOLOGIES WITH THE
RELEVANT BUILT ENVIRONMENT COUNCIL.**

Attached hereto is the Copy of the Professional Registration for the relevant South Africa Council on the built environment of at least one Company Director/s. Failure to submit the foresaid documentation will lead to disqualification.

[Copy of at least one Directors Professional Registration for the relevant South Africa Council in the Built Environment *to be inserted here*]

T2.A5 VALID PROFESSIONAL INDEMNITY INSURANCE DOCUMENTS

(Attached hereto is my / our copies of professional indemnity insurance documents. My failure to submit the copy with my / our bid document will lead to the conclusion that I am / we are do not have professional indemnity cover, and as such, our bid will be disqualified)

**T2.A6 VALID COIDA OR LETTER GOOD STANDING WITH THE DEPARTMENT OF
LABOUR (SOLE PROPRIETOR WITHOUT EMPLOYEES ARE EXPECTED TO SUBMIT
FROM THE DOL A TENDER LETTER FOR A SOLE PROPRIETOR)**

(Attached hereto is my / our certified copy of LETTER of good standing with the Compensation for Occupational Injuries and Diseases, e.g. letter of good standing. My / our failure to submit the certificate with your bid offer will lead to the conclusion that your entity/ company is not registered with COIDA, and therefore, the bid will be disqualified.)

T2.A7 SBD 1 INVITATION TO BID
PART A

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE INDEPENDENT DEVELOPMENT TRUST							
BID NUMBER:	IDTNT-PANEL 2022-2025	CLOSING DATE:	31 October 2022	CLOSING TIME:	12h00		
DESCRIPTION	A CALL FOR PROFESSIONAL SERVICE PROVIDERS IN THE BUILT ENVIRONMENT TO SUBMIT EXPRESSIONS OF INTEREST TO BE ON A PRE-APPROVED PANEL OF PROFESSIONAL SERVICE PROVIDERS FOR THE IDT IN ALL PROVINCES FOR A PERIOD OF 36 MONTHS						
BID RESPONSE DOCUMENTS MUST BE DEPOSITED IN THE BID BOX SITUATED AT (RESPECTIVE ADDRESS AS LISTED UNDER ITEM)							
IDT Office bidding for as listed under item							
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO				TECHNICAL ENQUIRIES MAY BE DIRECTED TO:			
CONTACT PERSON				CONTACT PERSON			
TELEPHONE NUMBER				TELEPHONE NUMBER			
FACSIMILE NUMBER				FACSIMILE NUMBER			
E-MAIL ADDRESS				E-MAIL ADDRESS			
SUPPLIER INFORMATION							
NAME OF BIDDER							
POSTAL ADDRESS							
STREET ADDRESS							
TELEPHONE NUMBER	CODE		NUMBER				
CELLPHONE NUMBER							
FACSIMILE NUMBER	CODE		NUMBER				
E-MAIL ADDRESS							
VAT REGISTRATION NUMBER							
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA		
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		
[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:

.....

T2.A8 SBD 4 BIDDER'S DISCLOSURE**1. PURPOSE OF THE FORM**

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of 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

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.

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature	Date
.....
Position	Name of bidder

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.

T2.A9 SBD 6.1 PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

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

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

a) GENERAL CONDITIONS

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

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

1.2

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

1.3 Points for this bid shall be awarded for:

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

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

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

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

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

b) DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

- (e) “**EME**” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) “**functionality**” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) “**prices**” includes all applicable taxes less all unconditional discounts;
- (h) “**proof of B-BBEE status level of contributor**” means:
- | | | |
|----|--|-----------|
| 1) | Status level certificate issued by an authorized body or person; | B-BBEE |
| 2) | affidavit as prescribed by the B-BBEE Codes of Good Practice; | A sworn |
| 3) | requirement prescribed in terms of the B-BBEE Act; | Any other |
- (i) “**QSE**” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

c) POINTS AWARDED FOR PRICE

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

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

80/20 or 90/10

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

d) POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

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

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

e) BID DECLARATION

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

f) B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: . = (maximum of 10 or 20 points)
(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

g) SUB-CONTRACTING

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

(*Tick applicable box*)

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

- 7.1.1 If yes, indicate:

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

(*Tick applicable box*)

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

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

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

h) DECLARATION WITH REGARD TO COMPANY/FIRM

- 8.1 Name of company/firm:.....
 8.2 VAT registration number:.....
 8.3 Company registration number:.....
 8.4 TYPE OF COMPANY/ FIRM
☐ Partnership/Joint Venture / Consortium
☐ One person business/sole propriety
☐ Close corporation

- ☐ Company
 - ☐ (Pty) Limited
- [TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
 - ☐ Supplier
 - ☐ Professional service provider
 - ☐ Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

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

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the consulting may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>	<p>.....</p> <p>SIGNATURE(S) OF BIDDERS(S)</p> <p>DATE:</p> <p>ADDRESS</p> <p>.....</p>
--	---

T2.A10 CONFIRMATION OF RECEIPT OF ADDENDA TO BID DOCUMENTS

I / We confirm that the following communications amending the bid documents that I / we received from Independent Development Trust or his representative before the closing date for submission of bids have been taken into account in this bid.

ADDENDUM No.	DATE	TITLE OR DETAILS

TENDERES NAME: _____

TENDERES ADDRESS: _____

PRINT FULL NAMES: _____

SIGNATURE

DATE

(Duly authorised to sign on behalf of the tenderer)

Part T2.B TECHNICAL RETURNABLE DOCUMENTS

EVALUATION OF QUALITY /FUNCTIONALITY

T2.B11 FIRM'S EXPERIENCE ON EXECUTION OF PROJECTS

The Bidder shall provide a schedule of completed contracts of diverse nature (discipline bidding for) in relation to building construction works. The following details must be included in the schedule and to score points bidders are required to submit Letters of Appointment and Reference Letter or form signed by the client related to the specific projects.

PROJECT NAME	PROJECT DESCRIPTION	EMPLOYER DETAILS			PROJECT VALUE (Including VAT)	START DATE	COMPLETION DATE
		NAME	TELEPHONE	EMAIL			
A							
B							
C							
D							
E							

T2.B11.2 Client reference letters

Complete the IDT Reference form REF for at least 3 projects submitted above as completed. Only full signed forms by the client or client's letter containing the required information in the form will be accepted.

T2.B12.1 A EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS PROJECTS REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Client Reference Scorecards" will be completed by each of the respective Clients for the projects listed in the "Previous Experience" returnable schedule.

REPORT ON BIDDER'S COMPETENCE & PERFORMANCE ON A PROJECT FOR TENDER RECOMMENDATION PURPOSES

The following are to be completed by the Client and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed Reference (in the form issued to the tenderer)

PROJECT NAME A:

Type of Project, e.g.:

.....
(New school, renovation of clinic, general scope, etc.)

Client:

Professional Fees Amount:

Professional Role:

Contract Duration:

Actual Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	1	

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

.....

Client's contact person:

Telephone:

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature:

Date:

T2.B12.2 B EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS PROJECTS REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Client Reference Scorecards" will be completed by each of the respective Clients for the projects listed in the "Previous Experience" returnable schedule.

REPORT ON BIDDER'S COMPETENCE & PERFORMANCE ON A PROJECT FOR TENDER RECOMMENDATION PURPOSES

The following are to be completed by the Client and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer)

PROJECT NAME B:

Type of Project, e.g.:

.....
(New school, renovation of clinic, general scope, etc.)

Client:

Professional Fees Amount:

Professional Role:

Contract Duration:

Actual Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	1	

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

.....

Client's contact person:

Telephone:

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature:

Date:

T2.B12.3 C EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS PROJECTS REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the "Relevant Experience" returnable schedule. "Client Reference Scorecards" will be completed by each of the respective Clients for the projects listed in the "Previous Experience" returnable schedule.

REPORT ON BIDDER'S COMPETENCE & PERFORMANCE ON A PROJECT FOR TENDER RECOMMENDATION PURPOSES

The following are to be completed by the Client and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer)

PROJECT NAME C:

Type of Project, e.g.:

.....
(New school, renovation of clinic, general scope, etc.)

Client:

Professional Fees Amount:

Professional Role:

Contract Duration:

Actual Contract Duration:

RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE

DESCRIPTION	SCORE	TICK APPROPRIATE SCORING
Very Good	5	
Good	4	
Fair	3	
Poor	2	
Not Acceptable	1	

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

Client's contact person:

Telephone:

I hereby declare that to the best of my knowledge, information completed above is true and correct and I understand that I will be held responsible for any misrepresentation.

Client Signature:

Date:

T2.B13 EVALUATION SCHEDULE: KEY PERSONNEL ASSIGNED TO THE WORK

The Bidder shall insert in the spaces provided on the following pages details of the key personnel required to be in the employment of the bidder or other organization, in order for the bidder to be eligible to submit a bid for this project. Certified proof of qualifications and professional registration must be appended to these schedules, together with the signed Curriculum Vitae by the CV owner of each individual. Failure to attach them will result in a zero score for key personnel.

Insert in the table below the key personnel and their proposed function

KEY PERSONNEL SCHEDULE

No.	Key Person Name	Proposed Function	Professional Registration	Years of Experience
1.				

T2.B15 EXPERIENCE OF PROJECT TEAM AND DELIVERABLES

PROJECT TEAM CVS

The experience of each key person, relevant to the scope of work, will be evaluated from three different points of view:

- 1) Post Registration experience (total duration of professional activity), in the specific sector, field, subject, etc. which is directly linked to the scope of work;
- 2) Qualifications in the relevant field or sector; and
- 3) Professional registration with a professional body in the specific sector, field, subject, etc., which is directly linked to the scope of work.

A CV of each key person of **not more than three (3) pages** should be attached to this schedule.

Each CV should be structured under the following headings:

- 1 Personal particulars
 - name
 - date and place of birth
 - place (s) of tertiary education and dates associated therewith
 - professional awards
- 2 Qualifications (degrees, diplomas, certificates, grades of membership of professional societies and professional registrations)
- 3 Name of current employer and position in enterprise
- 4 Overview of post graduate / diploma experience (year, organization and position)
- 5 Outline of recent assignments / experience that has a bearing on the scope of work

The scoring of the experience of key staff will be as detailed in Table under **item B of T1.2.3: Evaluation Procedures** above.

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

Signed

Date

Name

Position

Bidder

(CVs, certified copies not older than 6 months of qualifications and professional registration of the above personnel to be attached here).

T2.B16 COMPANY LOCALITY (10 POINTS)

Attached hereto is my / our copies of company proof of residence of company head office and/or branch/operational office located in any of the provinces. Verifiable Water, Electricity or Levy account in the name of the company/firm. Lease agreement accompanied by Landlord affidavit. Failure to submit will result in zero points. Bidder to tick or put a cross for regions bidding for.

Office Location	Head Office	Branch/Operational Office
Eastern Cape		
Free State		
Gauteng		
Kwa-Zulu Natal		
Limpopo		
Mpumalanga		
Northern Cape		
North-West		
Western Cape		

Part C1: CONTRACT

C1.1 Bid Contract Data

The Service Provider is advised to read the CIDB Standard Professional Services Contract 3rd Edition of CIDB document 1014. Which is the current applicable contract used for professional services providers. This services contract is based upon the **CIDB Standard Professional Services Contract**, published by the CIDB in July 2009.

Contractual obligations will be confirmed in the Request for Quotation as and when is required.

NOTE:

Services providers who qualify to be in the panel may be invited to submit quotations for available projects as and when is required.

The IDT will invite the service providers who qualified for this panel to compete for allocated projects to IDT by our client departments during this 36 months. Appointments for projects will be as and when required and will be dependent on project and budget availability.

It must also be noted that the IDT may decide to go out on an open tender for certain types of projects such as complex, megger or specialised projects or any project it wishes to go on an open tender.

PSP's who qualify to be in the panel can be invited to respond to projects specific bidding for price in line with project scope, complexity and value in accordance with the IDT SCM Policy. A second appointment letter will be provided for actual allocation of works.

Applicants must submit separate proposals for each discipline they wish to be involved in provided they meet the required criteria. Note that applicants who chose to bid for more than one discipline are required to download a document for each discipline they intend to bid for.

Upon allocation of works you will be required to submit a Professional Indemnity covering the allocated works or twice your estimated fees, whichever is the highest and conclusion of the applicable Client/ Consultant Agreement CIDB Standard Professional Services Contract 3rd Edition of CIDB document 1014 (or latest version at appointment), together with the IDT addendums and any other special conditions of contract.

Upon allocation of works applicants are to ensure that they have adequate resources to undertake the work under stringent timeframes.

Upon allocation of works the bidders are required to take cognizance of the roles of the other professionals that might be involved on the project.

Upon allocation of works the IDT reserves the right to ask tenderers to replace any member/s of the proposed team if they do not meet the IDT requirements.

Fee Structure per stage

Stage No.	Description	% of Fees Payable	Cumulative % of Fees Payable
1	Inception	5%	5%
2	Concept Design	20%	25%
3	Detailed design	10%	35%
4	Procurement and Doc	15%	50%
5	Works	30%	80%
6 & 7	Handover and Close out	20%	100%
Total		100%	100%

Part C2: PRICING DATA

C2.1 Pricing Instructions

C2.1.1 Basis of remuneration, method of bidding and estimated fees

- C2.1.1.1 Professional fees for Services will be paid based on the current Government Gazette at the time of the allocation of projects. Although government gazetted rates will apply, pricing may be a factor in determining the suitability of the proposal regarding the services to be provided.
- C2.1.1.2 Reimbursable rates for typing, printing and duplicating work and forwarding charges as set out under C2.2 herein will be paid in full.
- C2.1.1.3 Disbursements in respect of all travelling and related expenses including all travelling costs, time charges and subsistence allowances related thereto will be paid as specified in C2.3.1 herein.

C2.2 Typing, printing and duplicating work and forwarding charges

C2.2.1 Reimbursable rates

The costs of typing, printing and duplicating work in connection with the documentation which must of necessity be done shall be reimbursable at rates applicable at the time of the execution of such work. The document "Rates for Reimbursable Expenses" as adjusted from time to time and referred to below, is obtainable on the Employer's Website: <http://www.publicworks.gov.za/> under "Documents"; "Service providers Guidelines"; item 1.

C2.2.2 Typing and duplicating

If the Service Provider cannot undertake the work himself, he may have it done by another service provider which specialises in this type of work and he shall be paid the actual costs incurred upon submission of statements and receipts which have been endorsed by him confirming that the tariff is the most economical for the locality concerned.

- C2.2.3 **Typing and duplicating expenses** shall only be refunded in respect of the final copies of the following documents namely formal reports, formal soil investigation reports, specifications, feasibility reports, bills of quantities, minutes of site meetings and final accounts. The cost of printed hard covers shall only be paid in respect of documents which will be made available to the public such as bills of quantities and specifications or where provision of hard covers is specifically approved.

- C2.2.4 **The typing of correspondence**, appendices and covering letters are deemed to be included in the fees.

C2.3 Travelling and subsistence arrangements and tariffs of charges

C2.3.1 General

The most economical mode of transport is to be used taking into account the cost of transport, subsistence and time. Accounts not rendered in accordance herewith may be reduced to an amount determined by the Employer.

As the tariffs referred to hereunder are adjusted from time to time, accounts must be calculated at the tariff applicable at the time of the expenditure.

The Employer shall not be liable for travelling expenses for less than 50 km radius away from the base office.

Where journeys and resultant costs are in the Employer's opinion related to a Service Provider's mal performance or failure, in terms of this Contract, to properly document or co-ordinate the work or to manage the Contract, no claims for such costs will be considered.

The traveling disbursement cost will only be considered from the location of the project site and the closes location between the Service providers' bidding office or the IDT's regional office managing the project.

C2.3.2 Hired vehicles

In cases where use is made of hired vehicles, the most economical sized vehicle available is to be used but compensation shall nevertheless be restricted to the cost of a hired car not exceeding a capacity of 1300 cc. Where use of a special vehicle is essential (e.g. four track or minibus to accommodate more people), prior approval in writing must be obtained from the Employer.

Part C3: SCOPE OF SERVICES

C3.1 Professional Service Provider's objectives

- 3.1.1 The objective of this bid is to invite and appoint suitable Professional Service Providers that can provide and maintain a professional service to the Independent Development Trust (IDT), in order to successfully implement the construction administration and closeout of this projects, i.e., management and closing out the project/s.
- 3.1.2 The Service Provider shall provide **professional services as detailed in the Government Gazette of each discipline, applicable to the required service** and any other services related to the scope of work in the built environment which may reasonably be required for the successful completion of an infrastructure delivery project / programme.
- 3.1.3 The Service Provider shall provide suitably qualified, experienced personnel to undertake assignments relating to the delivery of the project/s as set out below as and when required during the Period of Performance.
- 3.1.4 Service providers will be appointed for stages 1 to 6, depending of the project, and will be expected to perform all activities and submit all deliverables as described in the deliverables aligned to the Government Gazette.
- 3.1.5 The Professional Service Provider will be appointed for the duration of the project, which incorporates any necessary project related extensions. Service Providers are to note that once appointed, they will be expected to commence the work at possibly very short notices.

Scope of service will be established when a project/programme becomes available, and service providers in the relevant panel will be invited to submit bids/quotes.

C3.2 General Requirements

C3.2.1 Services

The Services required shall generally be all “**Professional Services**” as defined in the Government Gazette/s for stages 1 to 6, unless otherwise reduced in writing.

The Service Provider shall be instructed by the Employer in writing to undertake specific assignments as additional services in terms of the contract as and when required during the contract period.

C3.2.2 Location

Location of the project will be confirmed when actual allocation of project/s has been done.

C3.2.3 Project Programme

The Service Provider shall prepare a detailed programme for the performance of the Service which shall be approved by the Employer. The programme shall be in sufficient detail to monitor the Service Providers performance at the time of allocation of project/s.

No agreed milestones may be extended beyond the timeframes outlined in the programme without acceptable motivation and approval by the Employer.

C3.2.4 Reporting Requirements and Approval Procedure

The Service Provider shall submit monthly (Aligned with prescribed Phase deliverables and fixed time deliverables and dates) progress reports, cost reports, cash flows and labour reports on the agreed date over and above site and technical meeting minutes required by the relevant contract on the time that the project is allocated.

Notwithstanding any other requirements, the Service Provider shall submit a monthly report covering progress (programme, delays, scope change, critical path, etc.), costs (expenditure, cash flow, variation orders, etc.), milestones, socio economic achievements (number of jobs created, use of SMMEs, interns, etc.), challenges and achievements.

C3.2.5 Safety

The Service Provider shall provide all safety equipment as required for his staff and shall undertake all duties in conformance with the relevant OHS legislation.

C3.3 Software application for programming

The Service Provider must avail himself of software to be used for compatibility with the Employers software before undertaking the work utilising the software. The Service Provider shall at its costs convert data files to a format compatible with the Employers software if it chooses to utilise software different from that used by the Employer. No additional compensation will be considered for this activity.

C3.4 Use of reasonable skill and care

It will be expected of the Service Provider to apply reasonable skills and due diligence in the execution of the duties stipulated in this document which shall include *inter alia* the following:

Although the Service Provider's documents and recommendations may be scrutinised by the Employer, this shall in no way relieve him of his professional responsibility for the proper and prompt execution of his duties.

During assessment of any existing facilities, which may have a direct bearing on the assignment, the Service Provider shall determine deficiencies in terms of the Occupational Health and Safety Act, 1993 (Act 85 of 1993), the SANS 10400, etc. and recommend measures to rectify them.

C3.5 Compliances with standards and regulations

The implementation of works should be executed in compliance with:

- National building Regulations and Building Standard Act
- Relevant SANS Standards
- PW 371-B Construction Works: Specifications (Edition 2.2 December 2015) from DPWI

C3.6 Indicative scope of work

This PSP Panel will be utilized for the implementation of infrastructure projects falling under the following categories:

Category	Description of Works
Green Field	New Building
Brown Field	Refreshment Upgrade Renovations Maintenance

This PSP Panel will be utilized for the implementation of infrastructure projects falling under (PROJECTS INCLUSIONS) the following Type Projects. The projects listed under exclusion will not be included for the scope of the panels.

Type Projects Inclusions:	Type Projects: Exclusions
Place of Instructions: Schools Sport and Recreation (indoor/Outdoor) Libraries Community Halls Public assembling Offices Recreation centers Roads Housing Museum / exhibitions halls Emergency Medical Services Moderated /Low Risk Industrial Areas Parking Areas Fire Stations Water and Sanitations for villages	Correctional Services SAPS Hospitals Clinic Community Health Centers Forensic Pathology Services Bulk Water and Sanitations Bridges & Dams

The scope of works indicates to respondents what the contract is likely to entail so that they can make an informed decision as to whether they wish to respond and, if so, structure their submission around the likely demands of the project.

Part C4: NOTES TO BIDDERS

This section outlines basic requirements that must be met. Failure to comply with these requirements or part thereof will result in your proposal being excluded from the evaluation process.

- a) This Request for Proposals (RFP) does not constitute an offer or recommendation to enter into such transaction
- b) The IDT reserves the right to amend, modify or withdraw this RFP if deemed necessary.
- c) Neither the IDT nor any of its respective directors, officers, employees, agents, representatives or advisors will assume any obligation for any costs or expenses incurred by any party in or associated with preparing or submitting a bid in response to the expression of interest.
- d) No entity may be involved, whether directly or indirectly, in more than one bid in response to a single discipline of this RFP. A failure to comply with this requirement will result in disqualification of the relevant entity
- e) The IDT and its advisors may rely on a Bid as being accurate and comprehensive in relation to the information and proposals provided therein by the Bidders.
- f) All Bids submitted to the IDT will become the property of the IDT and will as such will not be returned to the Bidder unless if received after the closing date and time. The IDT will make all reasonable efforts to maintain bids in confidence. Proprietary information should be identified as such in each bid.
- g) Evaluation of bids will be carried out by a Bid Evaluation Committee (BEC). The Evaluator(s) will, if necessary, contact Bidders to seek clarification of any aspect of the bid.
- h) The validity period of this bid is the establishment of the panel.
- i) The validity period of the panel of consultant is thirty-six (36) months from date of the appointment.
- j) This document is confidential and should not be distributed to any non-bidding party without the proper authorization of the IDT.
- k) This document is released for the sole purpose of responding to this RFP and must be considered confidential. In addition, the use, reproduction or disclosure of the requirements, specifications or other material in this RFP is strictly prohibited.
- l) All bids must be formulated and submitted in accordance with the requirements of this RFP.
- m) The service provider will be required to sign confidentiality contracts with the IDT.
- n) Please note that Bid Offer is synonymous to Request for Proposals in this document.
- o) Service providers who are blacklisted by any statutory body will, under no circumstances, be considered.
- p) Appointment of interns on all our projects

DISCLAIMER

The IDT reserves the right not to appoint a service provider and is also not obliged to provide reasons for the rejection of any proposal.