

**REQUEST FOR QUOTATION (RFQ) FOR APPOINTMENT OF A SERVICE PROVIDER FOR THE  
DESIGN AND IMPLEMENTATION OF A PERFORMANCE EVALUATION SYSTEM**

<b>Reference Number</b>	<b>IZIKO-HR -RFQ-01/2026</b>
<b>Description</b>	Request For Quotation (RFQ) to appoint a Service Provider for the Design and Implementation of a Performance Evaluation System
<b>Address</b>	Iziko South African Museum 25 Queen Victoria Street Cape Town 8001
<b>Attention</b>	Bomkazi Sitshoto-Mtsheke (Human Resources Manager)
<b>Site</b>	Iziko South Museums of South Africa
<b>Issued Date</b>	12 January 2026
<b>Closing date and time for submission</b>	30 January 2026 @ 11:am
<b>Method of delivery</b>	Quotes / Proposals, and accompanying documentation, must be emailed to (HRM) 021 481 3992 <a href="mailto:bmtsheke@iziko.org.za">bmtsheke@iziko.org.za</a> ; <a href="mailto:smadlavu@iziko.org.za">smadlavu@iziko.org.za</a>
<b>Technical enquiries</b>	Bomkazi Sitshoto-Mtsheke (HR) 021 4813992, <a href="mailto:bmtsheke@iziko.org.za">bmtsheke@iziko.org.za</a>
<b>Name of Company</b>	
<b>CSD Supplier Number (MA.....Number)</b>	
<b>B-BBEE Status Level of Contribution</b>	
<b>Quote Price (Incl Vat)</b>	
<b>Signature</b>	

## BIDDER'S DISCLOSURE (SBD 4)

### 1. PURPOSE OF THE FORM (SBD 4)

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

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

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise,  
employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....  
.....

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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.

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

- 2.3.1 If so, furnish particulars:

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

### **3 DECLARATION**

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of

reference for this bid.

- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition

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.

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 (Company Name)

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

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

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

### 1. GENERAL CONDITIONS

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

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

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

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for: (a) Price; and  
(b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

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

## 2. DEFINITIONS

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

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

- $P_s$  = Points scored for price of tender under consideration
- $P_t$  = Price of tender under consideration

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

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

$$\begin{array}{ccc} \text{80/20} & \text{or} & \text{90/10} \\ P_x = \frac{P_{max} - P_x}{P_{max} - P_{min}} \times 80 & \text{or} & P_x = \frac{P_{max} - P_x}{P_{max} - P_{min}} \times 90 \end{array}$$

Where

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

$P_t$  = Price of tender under consideration

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

## 4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

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

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

The specific goals allocated points in terms of this tender	Evidence	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of	<ul style="list-style-type: none"><li>• Proof of B- BBEE certificate;</li><li>• Company Registration Certification</li><li>• Identification Documentation.</li><li>• CSD report</li></ul>		
<b>Race: Black persons (ownership)*</b> 50% or more black ownership = 20 points  Less than 50% black ownership =			



**DECLARATION WITH REGARD TO  
COMPANY/FIRM**

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

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

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

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

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

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

## BACKGROUND AND CONTEXT

Iziko Museums of South Africa (Iziko) is a schedule 3A public entity and non-profit organisation, partly subsidised by the National Department of Sport, Arts & Culture (DSAC), bringing together 12 national museums and a Social History Centre situated in the Western Cape under a single governance and leadership structure. Iziko was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and is required to comply with the Public Finance Management Act (PFMA), 1999 (Act No. 1 of 1999, as amended) and its concomitant Regulations.

Iziko Museums currently operates without a fully functional and organisation-wide Performance Evaluation System (PES) to assess, monitor, and reward individual employee performance. Although the organisation utilises the Peromnes job grading framework to determine job levels and ensure remuneration parity, this framework evaluates the value of the job and does not measure or differentiate individual performance.

## REQUEST FOR QUOTATION FOR PROFESSIONAL SERVICES TO DESIGN AND IMPLEMENT PERFORMANCE EVALUATION SYSTEM

### 1. OVERVIEW

Iziko Museums seeks to appoint a qualified service provider to design and implement a Performance Evaluation System (PES) that sets clear, fair, and transparent performance standards; aligns individual performance with the APP and organisational strategy; supports recognition and progression; and strengthens accountability and organisational performance.

### 2. PURPOSE OF ASSIGNMENT

The purpose of this initiative is to design and implement a Performance Evaluation System (PES) that:

- Establishes measurable, fair, and transparent performance standards for all staff categories;
- Links individual performance to organisational outcomes and the APP;
- Provides a credible basis for performance recognition and merit progression;
- Promotes a culture of accountability, excellence, and continuous improvement

### **3. SCOPE OF WORK**

#### **3.1 Diagnostic Review**

- 3.1.1. Review existing performance management policies, tools, and practices.
- 3.1.2. Identify gaps and challenges through consultations and benchmarking.
- 3.1.3. Produce a brief diagnostic report with recommendations.

#### **3.2 PES Design**

- 3.2.1. Develop a practical, organisation-wide PES applicable to all staff categories.
- 3.2.2. Define performance standards, KPAs, KPIs, and competencies aligned with strategic priorities.
- 3.2.3. Establish processes for performance planning, mid-year reviews, annual assessment, underperformance management, and merit recognition.

#### **3.3 Tools and Documentation**

- 3.3.1. Develop templates for performance agreements, rating tools, scoring guides, and review forms.
- 3.3.2. Update or refine the existing Performance Management Policy.
- 3.3.3. Produce a PES user guide and implementation manual.

#### **3.4 Training and Capacity Building**

- 3.4.1. Train managers, supervisors, and employees on the PES and its tools.
- 3.4.2. Provide training materials and facilitator guides to support internal capability.

#### **3.5 Change Management and Communication**

- 3.5.1. Prepare a simple communication and change management plan.
- 3.5.2. Provide key messages, FAQs, and briefing notes for internal rollout.

#### **3.6 Implementation Support**

- 3.6.1. Support pilot testing of the PES in selected departments.
- 3.6.2. Refine tools and processes based on pilot results.
- 3.6.3. Provide technical assistance during the initial performance cycle.

#### 4.DELIVERABLES

- 4.1. Diagnostic Report
- 4.2. PES Framework and Model
- 4.3. Updated Policy and PES Tools
- 4.4. Templates, User Guide, and Training Materials
- 4.5. Communication and Change Tools
- 4.6. Pilot Report and Final Implementation Report

**Table 1: Delivery time Schedule**

	<b>Service Description</b>	<b>Time frame for delivery (e.g., 1 week, month <b>etc</b>)</b>
<b>1.</b>	Diagnostic Report	
<b>2.</b>	PES Framework and Model	
<b>3.</b>	Updated Policy and PES Tools	
<b>4.</b>	Templates, User Guide, and Training Materials	
<b>5.</b>	Communication and Change Tools	
<b>6.</b>	Pilot Report and Final Implementation Report	

The selected service provider shall work from their offices with co-ordinated visits to Iziko Museums when necessary.

#### 5. STAGE 2 - FUNCTIONALITY CRITERIA

A proposal which scores lower than the minimum overall percentage of 75% (75 points) will be eliminated from further evaluation; will be regarded as non-responsive and will not be evaluated further. All proposals which score 75% (75 points) and more for functionality will be eligible for further evaluation. Refer to table **5.1** below for Evaluation Criteria.

## 5.1 Evaluation Criteria

The selected service provider shall be required to indicate their capacity to deliver the services required by Iziko as per the requirements below:

1.Relevant skills and experience	Description	Weighting
Provide 5 (five) references letters no more than 5 (five) years old with contactable details on the clients' letter heads with proven experience designing and implementing performance management systems in public-sector or cultural/heritage institutions;	• 5 and above reference letters from previous projects.	30
	• 3-4 reference letters from previous projects.	20
	• 1-2 reference letters from previous projects	10
2. Proposed approach/ methodology:		
In order for Iziko to assess the bidder's level of competence relating to design and implementation of performance management systems , the bidder is required to provide proposal detailing value propositions for the Iziko based on the scope outlines not exceeding five pages.	• The proposal must demonstrate comprehensive knowledge, relevant experience, and competency alignment in the following areas: Diagnostic Reports ,Framework and Model Updated Policy and PES Tools Templates, User Guide, and Training Materials Communication and Change Management Tools Pilot Report and Final Implementation Report	20
	• If the proposal does not demonstrate full knowledge, relevant experience, and competency alignment in the areas outlined above, it	0
3. Internal capacity for the project		
The Director or Account Manager must hold an NQF Level 8 qualification in Human Resources or a related field, as well as a SABPP-accredited Strategic HR professional certification such as CPMP, SHRM, HRBP 2.0, or equivalent.	• <b>NQF level 8</b> qualification, Human Resources management, or related field with SABPP-accredited Strategic HR professional certification such as CPMP, SHRM, HRBP 2.0, or equivalent.	20

	<ul style="list-style-type: none"> <li>• <b>Degree /NQF 7</b> Level qualification in Human Resources Management, Law, Public Administration, or related field with with SABPP-accredited Strategic HR professional certification such as CPMP, SHRM, HRBP 2.0, or equivalent.</li> </ul>	15
	<ul style="list-style-type: none"> <li>• <b>National Diploma</b> in Business Administration, Human Resources, Law, Public Administration, or related field. with SABPP-accredited Strategic HR professional certification such as CPMP, SHRM, HRBP 2.0, or equivalent.</li> </ul>	5
<b>4. Team Experience</b>  Team Expertise in HR strategy, organizational development, and change management and provide a CV for the Account Manager highlighting their qualifications, skills, experience, professional body registrations, and relevant experience related to the competencies above. Team information as per requirements above as required.	All CV's of team Members  5 years' experience or more 3 – 4 years' experience 2 – 3 years' experience 1 – 0 years' experience	30  15 10 5 0
<b>Total Scoring</b>		100

## 6. Pricing

Pricing is an important factor as it ensures optimum value for money and should take into account the full duration of the contracting period. A cost schedule detailing, inclusive of VAT, any disbarments, including delivery costs, as well as escalations, if applicable, etc, must be provided in the table below.

**Table 2: Coste Schedule**

<b>No</b>	<b>Service Description</b>	<b>Costing per service</b>
<b>1</b>	Diagnostic Report	
<b>2</b>	PES Framework and Model	
<b>3</b>	Updated Policy and PES Tools	
<b>4</b>	Templates, User Guide, and Training Materials	

<b>5</b>	Communication and Change Tools	
<b>6</b>	Pilot Report and Final Implementation Report	
<b>7</b>	Disbursement's if applicable for the duration of the contract	
	<b>Total Excluding VAT</b>	
	<b>VAT 15%</b>	
	<b>Total including VAT</b>	

## 7. Compliance Documents

Service Providers must submit all documents as outlined in Table 3 Compliance Documents .

**Table 3: Compliance Documents**

<b>1</b>	<b>Central Supplier Database Report – with supplier number and company details (<a href="http://www.csd.gov.za">www.csd.gov.za</a>) and Tax Status Verification Pin together with tac=x registration number.</b>
<b>2</b>	<b>Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, nay disbursement and escalation, if applicable, etc, for the entire duration of the proposed contract must be provided.</b>
<b>3</b>	<b>A Valid B-BBEE Certificate or Sworn Affidavit to determine the Service provider's status level</b>
<b>4</b>	<b>Annexure C – Confidentiality and Non-Disclosure Agreement</b>
<b>5</b>	<b>SBD 4 – Bidders Disclosure</b>



**Note: Failure to supply any of the compliance documents stipulated may lead to the quote not being considered**

The points are allocated as follows:

**Table 4: Preference Point System**

Description		Points Allocated
1.	Price	80 Points
2.	Specific Goals	20 Points

## **8. Formal Contract**

- a) The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider.
- b) A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider/s.

## **9. General Principles**

- a) The lowest or only quotation received will not necessarily be accepted.
- b) Iziko and its Council reserves the right to accept or reject any quotation in response to the Request to Quote and to withdraw its decision to seek the provision of these services at any time.

## **10. DECLARATION**

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise:

- i) confirms that neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004.
- ii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iii) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest; and ;
- iv) confirms that the contents of this questionnaire/forms (SBD 4, & 6.1) are within my personal knowledge and are to the best of my belief both true and correct

v) accept that, in addition to cancellation of a contract, action may be taken against me should the Declaration prove to be false.

Signed

Date

Name

Position

Enterprise

***Please note that if the supporting documentation is not provided then the submission will be classified as non-responsive.***

**1. Disqualification**

Please note that if a bid document is not filled in correctly or completely, or complied with the specification, or is delivered/send after the bid closing date and time, or the supplier is not registered on the CSD or supplier has a non-compliant tax status, then unfortunately that bidder maybe disqualified. Please return this document with the supporting documents.

**2. Bid Document Submission**

Emailed tender documents will be accepted. However, the onus is on the tenderer to ensure that complete email documents have been received by the IZIKO by the due date and time.

Please note that any alterations to the tender document other than filling in the tenderer's details and tender price will automatically disqualify the tenderer.