



USER DEPARTMENT: Corporate Services (Records Management Unit)

NAME OF BIDDER.....

Closing date: 07th November 2023

Time: 12h00

NB: RFP should be emailed to: mamokidim@lepellex.co.za

Date issued: 26 October 2023

Closing date: 07 November at 12h00

DESCRIPTION: OFF SITE STORAGE FACILITY AND DISPOSAL SERVICES FOR RENTAL LNW HEAD OFFICES

1. PURPOSE

The purpose of these specifications is to find a suitable service provider who can provide Lepelle Northern Water with Offsite Storage services and disposal of the records being relocated to their storage facilities for a five-year contract period on a RFQ process.

2. BACKGROUND

Lepelle Northern Water has experienced a shortage of storage facility, hence its premises for a very long time whereas it generate a lot of paper based records which need sufficient storage facilities, which the organization is unable to make provision for that ,hence the provision of the storage facility may cost the organization a lot of money and as such these service will assist in reducing the cost for acquiring space which can be used for other important issues in the organization.

Lepelle Northern Water Records Management unit is committed to ensure a safe and secure document management services in line with the provision of the National Archives Act 43 of 1996.

OFFSITE STORAGE OF DOCUMENTS AND DISPOSAL FOR LNW DOCUMENTS.

Lepelle Northern Water have documents which need to be stored in a safe and secure environment and to be retrieved when the need arises.

As such the document management unit is looking for the RFP from the most suitably qualified and experienced service provider to provide an offsite storage solution and disposal of such records for Lepelle Northern Water's records.

3. SPECIFICATION

Provision of an Offsite storage facility and disposal services for Lepelle Northern Water records.

3.1 Scope of work

- Offsite storage and disposal of records in line with Lepelle Northern water file plan and Records Management policy of the organization.
- Secure offsite storage of the backup plans for documents stored offsite
- Disaster recovery plan and backup plans for the documents stored off -site
- Service provider should be able to destroy documents which are due for disposal in line with disposal procedures upon request by Lepelle Northern Water and issue a destruction certificate as outlined in the National archives Act 43 of 1996.
- Turnaround time for delivery of retrieved documents should be within 48 hours upon request by Lepelle Northern Water.
- Service provider should be able to collect documents from Lepelle Northern Water offices to their off-site storage and backup in a secure transport /delivery facility when need arises.
- Service provider must be able to provide packaging boxes, stationery and consumables and staff to render indexing service before records are removed from LNW
- Service provider should attach a list of detailed bills of quantities which is costed per item and summary of totals for monthly cost and overall cost for a period of 60 months

3.1.1 Deliverables

The Successful bidder is required to provide offsite storage facilities and to render disposal services for LNW in line with the provisions of the National Archives Act no 43 of 1996 for a period of five years.

OFFSITE STORAGE OF DOCUMENTS AND DISPOSAL FOR LNW DOCUMENTS.

Document management services required, amongst other things includes, onsite file management, data protection, backup and paper management, labelling and indexing of boxes as well as document disposal.

4.1 Requirements

Functional requirements

4.1.1 The off-site storage should be located within 120 km radius from LNW offices in Polokwane.

4.1.2 The off-site storage facilities should be accommodated in a secure, access-controlled systems site which is protected with electric fence and 24/7 security services

4.1.3 The off-site storage should be equipped with climate-controlled facilities which can prevent degradation of records, e. g adequate ventilation and humidity control as well as pest and rodents' control

4.1.4 The storage facilities should be following the Occupational health and safety standards and have fire preventative measures, which include fire detector, sprinkler system, and fire extinguishers.

4.1.5 The service provider must have more than ten years (10) experience in providing the off-site storage for public service documents which includes data processing, back up and paper management, documents management, labelling and indexing of boxes and disposal of records.

4.1.6 The service provider must submit a minimum of five (5) reference letters from their clients and preferably government departments which specify the type of service rendered, period of the service i. e. start date and end date. Letters must be on the departmental letter head and be signed by the relevant authorities in Records Management, dated and easy to trace the contact details.

5.1. Security

5.1.1 Service provider must attach their valid security clearance certificate in their proposal

5.1.2 LNW has the right to conduct another security clearance for selected bidders and service providers are requested to attach copies of their company profile and copies of the ID of the company directors for security clearance purpose

5.1.3 The appointment of the successful service provider will be subjected to positive security clearance.

5.2 Site inspection

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5.2.1 Lepelle Northern Water reserves the right to conduct site inspection for the selected service providers

5.3 Maintenance of the Service Level Agreement

5.3.1 Service Level Agreement will be signed between Lepelle Northern Water and the successful bidder upon finalization of the bid process.

5.4 Termination of the contract

5.4.1 The contract will be terminated immediately should the successful service provider no longer qualify as document management service provider in terms of the provision of the National Archives Act and State Security Agency prescripts.

5.4.2 Any Agreement or waving of the stipulations of the contract must occur in writing by mutual consent between LNW and the successful service provider.

5.5 Reporting requirements

5.5.1 The service provider shall report to the Head Office Records Management officer /IT Manager.

5.5.2 The service provider shall every month supply a summarised written report regarding the retrieval of the documents requested for the month under review.

6. Evaluation Criteria

Stage 1 : Bidders will be evaluated based on functionality .The minimum threshold for functionality is 70 out of 100 points .Bidders who fail to meet the minimum threshold will be disqualified and will not be evaluated further for the price and specific goals .

No	Criteria	Weights
1. Previous experience (attach signed reference letters)	<p>Company experience</p> <ul style="list-style-type: none"> • The service provider must have minimum of ten (10) years' experience in providing offsite storage and disposal services for public services documents (10 Simillar projects and above) • The service provider with 6-10 letters of experience (Similar to the projects.) 	<p>40</p> <p>20</p>

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	<ul style="list-style-type: none"> The service provider with 1-5 letters of experience (Similar to the projects) <p>(Failure to submit the required documents the bidder will forfeit points on this category)</p>	10
2. Project Implementation and methodology approach (Attach Project implementation plan and Methodology)	Detailed methodology to be used in the project. Bidders project with reference to proper works program, human resources /allocation are tailored to meet contract expectation.	
The above implementation and Methodology should also cover. <ul style="list-style-type: none"> Building and storage facility Human resources Transportation Safety of documentation. 	<p>The service provider provides a very good and technically sound project implementation and methodology approach that meet the project objective.</p> <p>The service provider provides a good and technically sound project implementation and methodology approach that meet the project objective.</p> <p>The service provider provides a Satisfactory and technically sound project implementation and methodology approach that meet the project objective.</p> <p>The service provider provides a poor and technically sound project implementation and methodology approach that is unlikely to satisfy project objectives or requirements.</p> <p>(Failure to submit the required documents the bidder will forfeit the points on this category)</p>	40 30 20 10
4	<p>Detailed business continuity plan (BCP)</p> <p>1. The service provider should attach detailed report on BCP for the documents stored in the off-site storage in case of emergency or disaster.</p> <p>(Failure to submit the required documents the bidder will forfeit points on this category)</p>	10
5	<p>Security Clearance Requirements</p> <p>1. Service providers must attach their Security Clearance certificates in their proposal.</p>	10

OFFSITE STORAGE OF DOCUMENTS AND DISPOSAL FOR LNW DOCUMENTS.

	<p>2. LNW reserves the right to conduct another security clearance for the selected bidders and service providers are required to attach copies of their company profile and copies of the ID /Passport of the Directors of the company for security clearance purpose</p> <p>Failure to attach copy of the security clearance bidders will forfeit points in this category</p>	
	Total	100

Stage 2: the proposal will be evaluated in line with price and Specific goals :

Specific Goals	Means of verification	80/20 Points	90/10 Points
1. Disability (Minimum of 1 shareholder ownership in the company)	CSD Report	5	3
2. Black women (100% Black women ownership in the company)	CSD Report	5	2
3. Black ownership (100% black ownership in the company)	CSD Report	5	2
4. Black Youth (Minimum of 1 shareholder Black youth ownership in the company)	CSD Report	5	3
Total points		20	10

OFFSITE STORAGE OF DOCUMENTS AND DISPOSAL FOR LNW DOCUMENTS.

4. PRICING SCHEDULE

Descriptions	Year 1		Year 2		Year 3		Year 4		Year 5	
	RATE/ Month (R)	Total for 12 Months (R)	RATE/ Month (R)	Total for 12 Months (R)	RATE/ Month (R)	Total for 12 Months (R)	RATE/ Month (R)	Total for 12 Months (R)	RATE/ Month (R)	Total for 12 Months (R)
M2 BOX BASE										
M2 BOX LID										
Disposal per box										
Travel cost										
Storage per box										
Handling fees per box collection										
Handling fees per box retrieval										
Handling fee per box permanent withdrawal										
Box registration box										
Indexing per										

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box								
Packing services								
Total for 5 years (R)								
VAT (R)								
Total for 5 years Inc. VAT (R)								

OFFSITE STORAGE OF DOCUMENTS AND DISPOSAL FOR LNW DOCUMENTS.

**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

1.2 **To be completed by the organ of state**
(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the 80/20 preference point system.
- b) 80/20 preference point system will be applicable in this tender. The lowest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	
SPECIFIC GOALS	
Total points for Price and SPECIFIC GOALS	100

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

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

2. DEFINITIONS

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 80/20

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

80/20

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

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
 - (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

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

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

(Note to organs of state: 80/20 preference point system is applicable, corresponding

points must also be indicated as such.

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
1. Disability (Minimum of one (01) shareholder in the company)	5	
2. Black women (100% Black women ownership in the company)	5	
3. Black ownership (100% black ownership in the company)	5	
4. Black Youth (Minimum of one (01) shareholder Black youth ownership in the company)	5	
Total	20	

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 property
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company

State Owned Company
[TICK APPLICABLE BOX]

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

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

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SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;**
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;**
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.**
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.**
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.**
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring**

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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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/Name of Company