



<b>RFP NUMBER:</b>	RFP/SASSETA/24251116/1
<b>DESCRIPTION:</b>	Appointment of a service provider to conduct workplace climate survey
<b>PUBLISH DATE:</b>	04 April 2025
<b>CLOSING DATE:</b>	30 April 2025
<b>CLOSING TIME:</b>	11h00 am
<b>COMPULSORY BRIEFING SESSION DATE</b>	N/A
<b>VALIDITY PERIOD:</b>	120 days from the closing date
<b>PREFERENCE POINT SYSTEM</b>	80/20
<b>BID RESPONSES TO BE SUBMITTED ELECTRONICALLY:</b>	Proposals are to be submitted electronically via email to <b>survey@sasseta.org.za</b> for the attention of Mr. Thapelo Motlhaga, Quoting the reference (RFP/SASSETA/24251116/1)
<b>ATTENTION:</b>	Mr. Thapelo Motlhaga
The email address ( <b>survey@sasseta.org.za</b> ) is for the submission of tender proposals only and will be accessed by SASSETA after the tender closing date and time.	
Queries related to this tender are to be sent to <b>scm04@sasseta.org.za</b> .	

**NB: The SASSETA logo and other intellectual property rights are owned by SASSETA and are protected by applicable intellectual property laws. Unless authorized in writing, you are prohibited from using the SASSETA logo or any of its intellectual property in any manner whatsoever. Any unauthorized use of the SASSETA Logo may result in legal action.**

***If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.***

## **DOCUMENTS IN THIS BID DOCUMENT PACK**

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

### **SECTION A**

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

### **SECTION B**

1. Invitation to Quote (SBD 1)
2. Pricing Schedule (SBD 3.3)
3. Bidder's Disclosure (SBD 4)
4. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
5. Submission Checklist
6. General Conditions of Contract (Annexure A)

## 1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

### 1.1 FRAUD AND CORRUPTION

- 1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

### 1.2 COMPULSORY BRIEFING SESSION

- 1.2.1 There will be no briefing session for this Request for Proposal.

### 1.3 CLARIFICATIONS/QUERIES

- 1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Mr. Thapelo Motlhaga** at [scm04@sasseta.org.za](mailto:scm04@sasseta.org.za) by **12h00** on **16 April 2025**. The **bid number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.**

### 1.4 SUBMITTING BIDS

- 1.4.1 Proposals to be submitted electronically via email to [survey@sasseta.org.za](mailto:survey@sasseta.org.za) (**maximum size of the email 30 MB**)
- Bidders are advised to compress their submission(s) to a maximum of 30MB file/folder. **Any submission(s) exceeding 30MB will be automatically rejected by the server.**
  - Submission(s) can be made through the method of email, WeTransfer, google drive etc. **Bidders are advised NOT to set expiry date on the submission(s) made.**
  - Bidders must not submit their responses via **Google drive** method as this option requires access via a Gmail account.
  - Bidders are advised to double check their submission(s) before responding to the bid.
- ❖ Closing date and time: **30 April 2025 @ 11h00**

### 1.5 LATE BIDS

- 1.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.

### 1.6 NEGOTIATION

- 1.6.1 SASSETA has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

## **1.7 REASONS FOR REJECTION**

- 1.7.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.
- 1.7.2 SASSETA may disregard the bid of any bidder if that bidder, or any of its directors:
  - 1.7.2.1 have abused the Supply Chain Management systems of SASSETA.
  - 1.7.2.2 have committed proven fraud or any other improper conduct in relation to such systems.
  - 1.7.2.3 have failed to perform on any previous contract and the proof exists.
- 1.7.3 Such actions shall be communicated to the National Treasury.

### **3. TERMS OF REFERENCE**

#### **3.1. INTRODUCTION AND BACKGROUND**

- 3.1.1. SASSETA is one of the twenty-one (21) Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's licence has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training (DHET).
- 3.1.2. SASSETA has internal stakeholders in the form of employees, ranging from members of the Executive Management to Interns.

#### **3.2. PURPOSE**

- 3.2.1. SASSETA seeks to appoint a service provider to conduct the periodic Employee Satisfaction Survey (later referred to herein as a survey) for a period ending 31st March 2030.
- 3.2.2. The purpose of the survey will be to determine the extent to which employees understand and support the strategy of SASSETA, its processes, systems, culture, and the level of their commitment towards the achievement of the business objectives.

#### **3.3. SCOPE OF WORK & REQUIRED DELIVERABLES**

- 3.3.1. The service provider shall be required:
  - 3.3.1.1. to prepare a comprehensive methodology and project plan, present these documents to SASSETA and
  - 3.3.1.2. obtain approval before commencing with the project.
  - 3.3.1.3. develop the instrument/s with which to conduct the survey.
  - 3.3.1.4. perform pre-survey engagements with employees to prepare them and secure the buy-in.
  - 3.3.1.5. prepare and deliver a comprehensive report indicating the methodology applied, findings, and recommendations from the assessment
  - 3.3.1.6. present the overall results of the study to the EXCO, the Management Committee (MANCO) and to the Task Team, employees, and the Accounting Authority provide guidance to the organization on change management strategies that can be implemented.
  - 3.3.1.7. facilitate workshops and provide guidance on the implementation plan.
  - 3.3.1.8. prepare a close-out report.

#### **3.4. DIMENSIONS**

- 3.4.1. The service provider will focus primarily on these dimensions but may also recommend additional areas of coverage based on landscape knowledge:
  - 3.4.1.1. Vision, Mission and Values

- 3.4.1.2. Diversity Management
- 3.4.1.3. Performance Management
- 3.4.1.4. Communication, Trust and Ethics
- 3.4.1.5. Organisational Support (Employees wellness programme)
- 3.4.1.6. Organisational Culture
- 3.4.1.7. Leadership
- 3.4.1.8. Job Satisfaction
- 3.4.1.9. Management Style
- 3.4.1.10. Conflict Management
- 3.4.1.11. Career Advancement and Succession Planning
- 3.4.1.12. Reward, Recognition and Benefits
- 3.4.1.13. Employee Morale
- 3.4.1.14. Employment Equity
- 3.4.1.15. Personal Development and Training
- 3.4.1.16. Inter and Intra Departmental Relationships
- 3.4.1.17. Policies and Procedures

### 3.5. MANDATORY REQUIREMENTS

- 3.5.1. The bidding company should have a team leader who possesses a minimum of NQF Level 9 qualification in Social Science. NB: International qualifications must be verified by SAQA and proof of the SAQA verification to be attached. **Non-submission of the NQF Level 9 qualification in Social Science and proof of SAQA verification for international qualifications will lead to disqualification of the bidder's proposal.**
- 3.5.2. The bidding company should have two (2) additional team members who each possesses the following:
  - 3.5.2.1. a minimum of NQF Level 8 qualification in Industrial Psychology. NB: International qualifications must be verified by SAQA and proof of the SAQA verification attached. **Non-submission of the NQF Level 8 qualification in Industrial Psychology and proof of SAQA verification for international qualifications will lead to disqualification of the bidder's proposal.**
  - 3.5.2.2. Certified proof of registration with an Industrial Psychology. **Non submission of the proof of registration with an Industrial Psychology Body will lead to automatic disqualification.**

### 3.6. TIMEFRAMES FOR DELIVERY OF THE WORK

- 3.6.1. The service provider shall be engaged from the date of appointment until 31st March 2030.
- 3.6.2. The project will be implemented in phases. The Task Team will provide guidance in that regard.

### 3.7. PRICING

- 3.7.1. The service providers are requested to provide an all-inclusive cost of this project assignment on SBD 3.3 (reflected in a locked excel template).
- 3.7.2. The service provider shall be expected to quote each individual task / item separately.
- 3.7.3. Total quote must include Value Added Tax (VAT) where applicable.

- 3.7.4. Total price marked (A) shall inform award decision.
- 3.7.5. The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.
- 3.7.6. Where the contract requires the successful bidder to travel to a venue different from SASSETA, the following travel and disbursement processes will be undertaken:
  - 3.7.6.1. Claim travel mileage costs applicable to this contract as per the Department of Transport rates
  - 3.7.6.2. Book only economy-class flights
  - 3.7.6.3. Book Group A hire cars, otherwise, Group B are to be used for service Providers outside of Gauteng.
  - 3.7.6.4. Utilise cost-effective mode of transport such as Uber/Taxify/Gautrain or shuttle services when travelling to and from the airport
  - 3.7.6.5. Book only Bed and Breakfast, Hotels, or other equivalent accommodations up to a Rand value of R1 400/ three (3) Star per night per person (including dinner, breakfast and parking).
  - 3.7.6.6. Submit all applicable invoices/receipts for the travel undertaken and also a google map of the trip where travel by private car was undertaken for payment.
  - 3.7.6.7. All travel to be approved by SASSETA before being undertaken.

### **3.8. ACCOUNTABILITY AND REPORTING**

- 3.8.1. The service provider will report directly to the SASSETA Executive Committee for the duration of the contract.

### **3.9. CONDITIONS OF CONTRACT (GCC) (ANNEXURE A)**

- 3.9.1. Bidders are requested to initial each page of the General Conditions of Contract (GCC) (Annexure A) and submit their response to this Request for Quotations. The GCC will form part of the contract with the successful Bidder.

### **3.10. INTELLECTUAL PROPERTY**

- 3.10.1. The service provider will be contracting with SASSETA. All products and data of this project, in whatever format raw or analysed, will be confidential information for utilisation by SASSETA. All information and documents, received from SASSETA or stakeholders, is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the Service Level Agreement.

### **3.11. PROTECTION OF PERSONAL INFORMATION ACT**

- 3.11.1. All Service Providers are to take note of the implications of POPIA act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:

- 3.11.1.1. All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.
- 3.11.1.2. The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA records management policies as prescribed by the national archives act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.
- 3.11.1.3. SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of information provided.
- 3.11.1.4. SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

### 3. PROPOSED SELECTION CRITERIA

#### 3.1 Compliance requirements

3.1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions.

#### 3.2 Conditions for selection/short listing

3.2.1 All submissions will be evaluated as follows:

##### 3.2.1.1 Phase 1 – Requirements items, Service Providers to:

- Submit their proposal by the closing date and time. **Submission after the closing date will lead to automatic disqualification.**
- The bidding company should have a team leader who possesses a minimum of NQF Level 9 qualification in Social Science. NB: International qualifications must be verified by SAQA and proof of the SAQA verification to be attached. **Non-submission of the NQF Level 9 qualification in Social Science and proof of SAQA verification for international qualifications will lead to disqualification of the bidder's proposal.**
- The bidding company should have two (2) additional team members who each possess the following:
  - ❖ a minimum of NQF Level 8 qualification in Industrial Psychology. NB: International qualifications must be verified by SAQA and proof of the SAQA verification attached. **Non-submission of the NQF Level 8 qualification in Industrial Psychology and proof of SAQA verification for international qualifications will lead to disqualification of the bidder's proposal.**
  - ❖ Certified proof of registration with an Industrial Psychology. **Non submission of the proof of registration with an Industrial Psychology Body will lead to automatic disqualification.**
- complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD1, SBD 3.3, SBD 4, SBD 6.1.
- Bidders to be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with your proposal.

##### 3.2.1.2 Phase 2 – Functionality evaluations

- The proposals of all service providers will be rated on a scale of 0 to 1.

0: Does not meet set criteria

1: Fully meet set criteria.

ELEMENT	FUNCTIONALITY EVALUATION		WEIGHT	TOTAL SCORE
	Rating out of 1	Evaluation criteria		
<b>Submission of Reference letters</b>				
The bidding company should have completed a minimum of three (3) assignments in conducting stakeholder satisfaction surveys ( <i>three (3) or more signed reference letters on company letterheads to be attached</i> ). <b>(30 points)</b> .	<b>Reference letters for the work done previously</b>			
	0	The bidder has NOT attached any reference letter or attached less than three (3) reference letters/ submitted reference letters are not signed.	<b>30</b>	
1	The bidder has attached three (3) or more signed reference letters.			
<b>Project team leader</b>  The project team leader must have successfully completed a minimum of three (3) stakeholder satisfaction survey assignments. Detailed CV to be attached. <b>(35 points)</b>	0	The project team leader CV indicates less than three (3) stakeholder satisfaction survey assignments completed.	<b>35</b>	
	1	The project team leader CV indicates three (3) or more stakeholder satisfaction survey assignments completed.		
<b>Two (2) additional team members</b>				
The bidding company to submit CVs of two additional team members indicating a minimum of three (3) years' work experience in the conducting stakeholder satisfaction survey. <b>(35 points)</b>	0	The CV of one or CVs of both two additional team member(s) indicate less than three (3) years' work experience in the conducting stakeholder satisfaction surveys.	<b>35</b>	
	1	The CVs of the two additional team members indicate three (3) years' work experience in the conducting stakeholder satisfaction surveys.		
<b>Total</b>			<b>100%</b>	

**NB: Bidders need to obtain a minimum of 70% for functionality for them to be evaluated further on the 80/20 preference point system**

3.2.1.3. **Phase 3 – Price and Specific Goals**

**The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where 80 points will be allocated to price and 20 points for Specific Goals as follows:**

<b>Evaluation Criterion on Price and Specific Goals</b>	
Relative competitiveness of proposed price	80
Specific Goals	20
<b>TOTAL FOR PRICE AND SPECIFIC GOALS</b>	<b>100</b>

**3.3. ADJUDICATION OF BID**

- 3.3.1. The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder will usually be the service provider scoring the highest number of points lower-scoring bid based on firm, verifiable and justifiable grounds, or no award at all.

## PART A - INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFP/SASSETA/24251116/1	CLOSING DATE:	30 April 2025	CLOSING TIME:	11h00am
DESCRIPTION	Appointment of a service provider to conduct workplace climate survey				
<b>PROPOSALS TO BE EMAILED:</b>					
Proposals to be submitted electronically via email to survey@sasseta.org.za for the attention of <b>Mr. Thapelo Motlhaga</b>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Mr. Thapelo Motlhaga		CONTACT PERSON	Mr. Thapelo Motlhaga	
E-MAIL ADDRESS	scm04@sasseta.org.za		E-MAIL ADDRESS	scm04@sasseta.org.za	
<b>SUPPLIER INFORMATION</b>					
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	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
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 PART B:3 ]	
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>					
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	
<b>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.</b>					

**PART B  
TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b></p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b></p>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>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.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> <p>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.”</p>

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

**NAME OF SIGNATORY** .....

**SIGNATURE OF BIDDER:** .....

**N/B.:** If a Company has one director as listed on CSD, the one Director to sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

**N/B.:** If the Company has more than one Director as listed on CSD, a signed Company Resolution to be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

**CAPACITY UNDER WHICH THIS BID IS SIGNED:** .....  
(Proof of authority must be submitted e.g. company resolution)

**DATE:** .....

**PRICING SCHEDULE**  
**(Professional Services)**

NAME OF BIDDER: .....	BID NO.: RFP/SASSETA/24251116/1
CLOSING TIME: <b>11h00</b>	CLOSING DATE: <b>30 April 2025</b>

OFFER TO BE VALID FOR **120** DAYS FROM THE CLOSING DATE OF BID

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.
3. Bidders to complete these amounts on this document, and to be the same as the total amount on the quotation incl. VAT (where applicable).
4. The prices quoted are to apply to the SASSETA contract from the date of appointment until 31st March 2030 with an annual Consumer Price Index (CPIX) adjustment on 1 April each year.

**FIXED COSTS**

No.	Items	Method of billing	Cost inclusive of VAT (where applicable)
1a	Pre-engagement session - SASSETA Manco	per report	R
1b	Pre-engagement session - SASSETA Staff	per report	R
2	Submission of a Literature Review	per report	R
3	Development/customisation of the data collection instrument	per cycle	R
4a	Production of the Draft Survey report including presentation to the Task Team, MANCO, and possibly AA - Internal Stakeholder	per report	R

No.	Items	Method of billing	Cost inclusive of VAT (where applicable)
5a	Debriefing on the outcomes of the survey - SASSETA AA and submission of a report	per cycle	R
5b	Debriefing on the outcomes of the survey - SASSETA Manco and submission of a report	per cycle	R
5c	Debriefing on the outcomes of the survey - SASSETA Staff and submission of a report	per cycle	R
6	Production of the <u>Final</u> Survey report including presentation to the Task Team, MANCO, and Accounting Authority	per report	R
7	Production of a close of report post recommendation	per phase	R
<b>Total Cost VAT Incl.</b>			<b>R</b>

#### VARIABLE COSTS

No	Items	Method of billing	Annual cost inclusive of VAT (where applicable)
1	Cost of facilitating workshops	per group	R
2	Consulting fees - Industrial Psychologist	per hour	R
3	Consulting fees - Project Leader	per hour	R
<b>Total Cost VAT Incl.</b>			<b>R</b>

Bidders are to complete the name and surname of the proposed team leader/member on this assignment and ensure that comprehensive CVs are attached to the proposal as follows:

NO.	ROLE IN THE TEAM	NAME AND SURNAME (Bidders to record only one (1) name per role. If more than one (1) name is provided, the evaluation will be done on the 1 <sup>st</sup> name per role)	IS CV ATTACHED? <i>(circle the response below)</i>	IS THE QUALIFICATION ATTACHED <i>(circle the response below)</i>
1.	Team Leader		Yes/No	Yes/No
2.	Member one (1)		Yes/No	Yes/No
3.	Member one (1)		Yes/No	Yes/No

**NB: Failure to quote on any or all of the items listed above will lead to automatic disqualification from price evaluation**

**NB: For the purpose of evaluations the anticipated cost as referred to above will be considered**

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

**(To be signed by a duly authorised Delegate. A signed Company Resolution must be submitted). (To be signed by a duly Authorised Delegate)**

**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 interest 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.

Full Name	Identity Number	Name of State institution

**N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above**

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

**2.2.1** If so, furnish particulars:  
 .....  
 .....

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

**2.3.1** If so, furnish particulars:

.....  
.....

**3. DECLARATION**

I, 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>1</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 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.

.....

<sup>1</sup> 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.

**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).

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

- (a) (The applicable preference point system for this tender is the 80/20 preference point system.
- (b) 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:

- (c) Price; and
- (d) Specific Goals.

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

The maximum points for this tender are allocated as follows:

	<b>POINTS</b>
<b>PRICE</b>	80
<b>SPECIFIC GOALS</b>	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. **FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES**

2.1 **POINTS AWARDED FOR THE PRICE**

2.1.1 **THE 80/20 PREFERENCE POINT SYSTEMS**

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

**80/20**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

2.2 **POINTS AWARDED FOR SPECIFIC GOALS**

2.2.1 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.

2.2.2 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:

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

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

<b>The specific goals allocated points in terms of this bid</b>	<b>Number of points allocated (80/20 system) (To be completed by the organ of state)</b>	<b>Number of points claimed (80/20 system) (To be completed by the bidder)</b>
At least 100% Black People ownership	5	
At least 30% Black Women Ownership	4	
At least 30% Black youth ownership	4	
The Promotion of South African owned enterprises	7	
<b>Total Points</b>	<b>20</b>	

3. **DECLARATION WITH REGARD TO COMPANY/FIRM**

3.1. Name of company/firm.....

3.2. Company registration number: .....

3.3. **TYPE OF COMPANY/ FIRM**

Partnership/Joint Venture / Consortium

One-person business/sole propriety

Close corporation

- Y Public Company
  - Y Personal Liability Company
  - Y (Pty) Limited
  - Y Non-Profit Company
  - Y State Owned Company
- [TICK APPLICABLE BOX]

3.4. 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.

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

**DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS**

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:

- a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
- b) Valid Companies and Intellectual Property Commission (CIPC) Company registration documents
- c) Certified copy/ies of Identity documents of the Company Directors
- d) CSD report
- e) medical report (if any)
- f) declaration letter signed by the bidder.

**NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.**

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

**(To be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).**

***If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.***

**BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:**

NO.	DETAILS	TICK BY BIDDER
1.	<b>Part 1:</b> Completed and signed the invitation to bid document (SBD 1) • <b>To be signed by a duly Authorised Delegate.</b>	
2.	<b>Part 2:</b> Completed and signed pricing schedule (SBD 3.3) • <b>To be signed by a duly Authorised Delegate</b>	
3.	<b>Part 3:</b> Completed and signed the bidder's declaration (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document)</i> • <b>To be signed by a duly Authorised Delegate</b>	
4.	<b>Part 4:</b> Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1) <b>To be signed by a duly Authorised Delegate.</b>	
5.	<b>Part 5:</b> Submitted the General Conditions of Contract (initialled each page)	
6.	<b>Part 6:</b> Bidders to submit their National Treasury Central Supplier Database (CSD) registration document.	
7.	<b>Part 7:</b> Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3	
8.	<b>Part 8:</b> The bidding company should have a team leader who possesses a minimum of NQF Level 9 qualification in Social Science. NB: International qualifications must be verified by SAQA and proof of the SAQA verification to be attached.  <b>Non-submission of the NQF Level 9 qualification in Social Science and proof of SAQA verification for international qualifications will lead to disqualification of the bidder's proposal.</b>	
9.	<b>Part 9:</b> The bidding company should have two (2) additional team members who each possess the following:  a minimum of NQF Level 8 qualification in Industrial Psychology. NB: International qualifications must be verified by SAQA and proof of the SAQA verification attached. <b>Non-submission of the NQF Level 8 qualification in Industrial Psychology and proof of SAQA verification for international qualifications will lead to disqualification of the bidder's proposal.</b>  Certified proof of registration with an Industrial Psychology. Non submission of the proof of registration with an Industrial Psychology Body will lead to automatic disqualification.	
10.	<b>Part 10:</b> The bidding company should have completed a minimum of three (3) assignments in conducting stakeholder satisfaction surveys (three (3) or more signed reference letters on company letterheads to be attached).	
11.	<b>Part 11:</b> The project team leader must have successfully completed a minimum of three (3) stakeholder satisfaction survey assignments. Detailed CV to be attached.	
12.	<b>Part 12:</b> The bidding company to submit CVs of two additional team members indicating a minimum of three (3) years' work experience in the conducting stakeholder satisfaction survey.	
13.	<b>Part 13:</b> Bidders to submit:	

	<b>NB.: Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT being awarded.</b>	
	Valid Companies and Intellectual Property Commission (CIPC) Company registration documents	
	Certified copy of Identity document of company directors	

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