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ELUNDINI LOCAL MUNICIPALITY
TENDER NOTICE AND INVITATION TO TENDER

The Elundini Local Municipality is Requesting for Proposals on the following services:

PROJECT NAME	Contract Number	Closing Date	Technical Enquires contacts
General Valuation and Preparation of a Valuation Roll for a period of three years	ELM-6/006/2023-2024	Monday, 23 October 2023	Mr D. Muthelo Tel. 045 932 8160 E-mail: dakalom@elundini.gov.za

1. The Elundini Local Municipality is looking to appoint experienced and suitably qualified Service Provider to perform the functions of a municipal valuer in terms of the MPRA to perform General Valuation and Preparation of a Valuation Roll for Implementation 1 July 2025 and Preparation and Updating of the Valuation Roll for the Period 1 July 2024 to 30 June 2027.

Contracts will be based on the National Treasury General Condition of Contracts. The bids will be evaluated on the basis of the Preferential Procurement Policy Framework Act, 2022, the Elundini Local Municipality's Supply Chain Management Policy and the 80/ 20 preferential procurement point system for acquisition of goods or services with Rand value equal to or below R50 million will be applied.

Stage 1 of Evaluation: Eligibility Criteria:

Bidders with non-compliant with the below Eligibility Criteria will be disqualified and not be considered for Functionality evaluation.

Compulsory Human Resources and Competencies Required to Qualify as a Service Provider

- (1) The Service Provider must provide a Human Resource Plan for the project with a clear organisational structure and provide named resources, each with their capability profile and CV's, demonstrated knowledge and experience in their assigned function (as per 2(a) to (d).
- (2) The Human resource plan must include the following key human resources:
 - (a) a Municipal Valuer (Project Leader); registered as a Professional Valuer or Professional Associated Valuer (with no restrictions) with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000) and must have relevant experience.
 - (b) Assistant Municipal Valuers who must be registered as a Professional Valuer, Professional Associated Valuer or Candidate Valuer with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000);
 - (c) a GIS manager with GIS certificate and experience in GIS and data management.
 - (d) data capturers or administrative staff
- (3) The company (Bidder) must have compiled and completed at least one supplementary or general valuation roll (Reference from the client worked for).
- (4) The Bidder must submit proof of Professional Indemnity Insurance to the amount of contract tendered.

Stage 2 of Evaluation - Functionality

Evaluation Criteria	Points
Municipal Valuer must comply with Section 39 (1) of the MPRA Registered as a professional valuer or professional associated valuer in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000 with experience as a municipal Valuer	30
Experience of Tendering Company in conducting major Valuation work	15
Skills transfer programme	5
Human resources capacity	15
Back-up and recovery plan	5
Public Participation Plan	5
Quality Assurance Plan	5
Insurance	5
Valuation Roll Management System (VRMS) Accreditation.	5
General Valuation Project plan and implementation methodology	10

Total Points

100

A minimum score of 70% out of total points must be score in order to proceed to the Financial Evaluation in all of the above bids.

The scope of work, specification and detailed functionality including mandatory documents (eligibility criteria) and bid conditions will be uploaded on ELM Website. www.elundini.gov.za and will be also attached in the tender document.

Bidder that fail to submit proof of specific goal as stipulated below will not be allocated points

The specific goals allocated points in terms of this tender	Number of points claimed (80/20 system) (To be completed by the organ of state)	Proof to claim points
Tender Price	80	
EME or QSE which is at least 51% who are Youth-Enterprise 18-35	4 Points	Company Registration Document and Certified ID Copy, CSD Report
EME or QSE which is at least 51% owned by Women	4 Points	Company Registration Document and Certified ID Copy, CSD Report
EME or QSE which is at least 51% Disability-Equity ownership	2 Points	Medical report
EME or QSE which is at least 51% black owned	10 Points	Company Registration Document and Certified BBBEE Certificate or Original Sworn Affidavit and CSD Report
Total (Specific Goals)	20 Points	

Tender documents may be obtained from the Elundini Local Municipality SCM Unit upon payment of a non-refundable amount of R250 (two hundred and fifty Rand), either paid in cash or by means of electronic funds transfer (EFT) to the Elundini Local Municipality. The cash amount is to be paid at the cashier's office between the hours of 08:00 and 16:00, prior to the collection of the tender documents form the SCM unit. ELM Cashier's office is situated at Elundini Traffic Department, ERF 3503 Station Street, Nqanqarhu, 5480. The tender documents will be available from **Wednesday, 20 September 2023**.

NB: For EFT payment deposit at ELM FNB cheque account No: 62159933772 and use this reference No. 020114350000. Proof of payment to be sent to: kwaneles@elundini.gov.za upon receiving proof payment, Elundini Municipality will email the tender document to the service providers who are unable to make collections.

The Tender Data, Detailed breakdown test for responsiveness conditions, scope of work including mandatory documents (eligibility criteria) and bid conditions will be uploaded on ELM Website. www.elundini.gov.za, National Treasury E-tender portal and will be also attached in the tender document. Queries relating to the issue of these documents may be addressed to Ms H Mdusulwana, Tel No. 045 932 8125 or email: hlubikazi@elundini.gov.za

Tender submission and supporting documentation must to be placed in a sealed envelope endorsed with **RELEVANT PROJECT NAMES AND BID NUMBERS**: must be delivered to the **Elundini Local Municipality, at No. 1 Seller Street, Nqanqarhu, Finance Department, Cashier's reception area, and placed in the Tender Box not later than 12H00 Noon** on the above mentioned dates for this bids at which time the tenders will be opened in public.

Bidders are encouraged to make electronic copies of the bid submission in a form of USB / CD as a precautionary backup. This is not compulsory.

Telegraphic, telephonic, telex, facsimile, e-mail and late tenders will not be accepted. Tenders may only be submitted on the tender documentation that is issued. Requirements for sealing, addressing, delivery, opening and assessment of tenders are stated in the Tender Data.


JACK MDANI
MUNICIPAL MANAGER

BID CONDITIONS AND INFORMATION

Clause number	Tender Data
1	The employer is the Elundini Local Municipality
2	The tender documents issued by the employer comprise the documents listed on the contents page
3	<p>The employer's representative is: Name: Mr D. Muthelo Elundini Local Municipality 1 Seller Street, Nqanqarhu, 5480. Tel No.: 045 932 8160 Fax No.: 045 932 1094 E-mail: dakalom@elundini.gov.za</p>
4.	The language for communications is English
5	<p>Elundini Local Municipality bidding process in the context of this bid is administered by ELM Supply Chain Management Policy, MFMA Act 56 of 2003 and MFMA SCM Regulations and shall act in accordance with the said legislative prescripts</p> <p>The General Conditions of Contract as well as any Special Conditions of Contract that may form part of this set of bid documents will be applicable to this bid in addition to the conditions of bid.</p>
6	The successful bidder will be expected to sign the service Level agreement within 30 days from the date of notification by the Elundini Municipality that his/her bid has been accepted.
7	Tenderer's Obligations
7.1	<p>Only tenderers who satisfy the following eligibility criteria and who have provided the required evidence in their tender submission are eligible to have their bid offers evaluated:</p> <ol style="list-style-type: none"> JV Eligibility requirements: <ul style="list-style-type: none"> Incorporated Joint Venture that complies with the Companies Act and other relevant laws and regulations. A Joint venture must submit a consolidated valid original or certified copy of B-BBEE certificate must be submitted with the bid OR a valid original or certified copy of a Sworn Affidavit attested by a Commissioner of Oaths prepared and issued in terms of the amended B-BBEE Construction Sector Codes (CSC000) must be submitted in order to qualify for preference points for B-BBEE. Failure to comply with this, will automatically results in the non-awarding of points for B-BBEE.(This will not disqualify bidders but points for B-BBEE will not be allocated) Submit Joint Venture agreement in the case of joint venture. Fully completed Compulsory Returnable Documents for JV Directors or company is not in the Treasury's database of restricted suppliers JV to be Incorporated Joint Venture in terms of Companies Act 2008 and contract law. <p>COMPULSORY HUMAN RESOURCES AND COMPETENCIES REQUIRED TO QUALIFY AS A SERVICE PROVIDER</p> <ol style="list-style-type: none"> <p>(1) The Service Provider must provide a Human Resource Plan for the project with a clear organisational structure and provide named resources, each with their capability profile and CV's, demonstrated knowledge and experience in their assigned function (as per 2(a) to (d)).</p> <p>(2) The Human resource plan must include the following key human resources:</p> <ul style="list-style-type: none"> (a) a Municipal Valuer (Project Leader); registered as a Professional Valuer or Professional Associated Valuer (with no restrictions) with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000) and must have relevant experience. (b) Assistant Municipal Valuers who must be registered as a Professional Valuer, Professional Associated Valuer or Candidate Valuer with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000); (c) a GIS manager with GIS certificate and experience in GIS and data management. (d) data capturers or administrative staff <p>(3) The company (Bidder) must have compiled and completed at least one supplementary or general valuation roll (Reference from the client worked for).</p> <p>(4) The Bidder must submit proof of Professional Indemnity Insurance to the amount of contract tendered</p>

7.2	Tenderer must submit one (1) hard copy of the original tender submission in the prescribed format at tender submission deadline failure to do so, the tenderer will be disqualified. Bidders are encouraged to make electronic copies of the bid submission in a form of USB / CD as a precautionary backup. This is not compulsory
8	The tenderer accepts that, unless otherwise stated in the tender data, the employer does not compensate the tenderer for any costs incurred in the preparation and submission of a tender offer, including the costs of any testing necessary to demonstrate that aspects of the offer comply with requirements.
9	It is the responsibility of the tenderer to check the tender documents on receipt for completeness and notify the employer of any discrepancy or omission.
10	The tenderer must record and reference all information submitted contained in other documents for example cover letters, brochures, catalogues, etc. in the returnable schedule titled "List of Other Documents Attached by Tenderer" .
11	Treat as confidential all matters arising in connection with the tender. Use and copy the documents issued by the employer only for the purpose of preparing and submitting a tender offer in response to the invitation.
12	The tenderer shall obtain, as necessary for submitting a tender offer, copies of the latest versions of standards, specifications, conditions of contract and other publications, which are incorporated into the tender documents by reference.
13	Acknowledge receipt of addenda to the tender documents, which the employer may issue, and, if necessary, apply for an extension to the closing time stated in the tender data, in order to take the addenda into account.
14	<p>Please note that if the tender stipulates that a site/clarification meeting is mandatory/compulsory; then suppliers must attend such meeting. Those suppliers who do not attend such mandatory/compulsory meeting will be disqualified and will not be evaluated.</p> <p>Where compulsory briefing is applicable, tenderers will be obligated to sign the attendance list in the name of the tendering entity. In that case, any Addenda issued to tenders will be received only from those tendering entities appearing on the attendance list.</p>
15	<p>Tenderers must request clarification on the tender documents, if necessary, by notifying the employer at least 5 (Five) working days before the closing time stated in the tender data. No clarifications that will require issue of an addendum will be entertained after this period.</p> <p>Bidders shall not contact the Elundini Municipality on any matter relating to their bid from the time of the opening of the bid to the time the contract is awarded for additional information or amendments of bids. Any effort by the firm to influence the Elundini Municipality in the bid evaluation, bid comparison or contract award decisions may result in the rejection of the bid.</p>
16	Tenderers are required to state the rates and currencies in Rands. Include in the rates, prices, and the tendered total of the prices (if any), all duties, taxes which the law requires to be paid [except value added tax (VAT)], and other levies payable by the successful tenderer, that are applicable 14 days before the closing time stated in the tender data. Show the VAT payable by the employer separately as an addition to the tendered total of the prices. Provide rates and prices that are fixed for the duration of the contract and not subject to adjustment except as provided for in the conditions of contract identified in the contract data. State the rates and prices in monetary value of the contract unless otherwise instructed in the tender data
17	If after the commencement of the Contract, the cost or duration of the services is altered as a result of changes in, the amount of the main contractor or contract amount from which estimate were based, or amounts or additions to, any statute, regulation or by-laws, or the requirements of any authority having jurisdiction over any matter in respect of the Project, then the Contract Price and time for completion shall be adjusted in order to reflect the impact of those changes, provided that, within 90 days of first having become aware of the change, the Contractor furnished the Employer with detailed justification to the Price or Period of the Performance (or both).
18	<p>Alterations to the documents</p> <p>Do not make any alterations or additions to the tender documents, except to comply with instructions issued by the employer or to correct errors made by the tenderer and ensure that all signatories to the tender offer initial all such alterations. Do not make erasures using masking fluid.</p> <p>No unauthorised alteration of this set of bid documents will be allowed after the closing date. Any unauthorised alteration will disqualify the proposal automatically. Any ambiguity has to be cleared with contact person for the bid before the closure date.</p>
19	<p>Signatory</p> <p>A copy of the recorded Resolution taken by the Board of Directors, members, partners or trustees authorising the representative to submit this bid on the bidder's behalf must be attached to the Bid Document on submission of same.</p> <p>A bid shall be eligible for consideration only if it bears the signature of the bidder or of some person duly and lawfully authorised to sign it for and on behalf of the bidder</p>

20	No alternative tender offers will be considered
21	Parts of each tender offer communicated on paper shall be submitted as an original. No copies are required
22	Bidder must comply with all pricing instructions as stated on the Price Schedule and tender conditions
23	<p>Tax Clearance Certificate</p> <p>Bidder must submit a valid SARS Tax Clearance Certificate or/and a tax compliance status document reflecting the pin for the Employer to verify that the tenderer is in good standing.</p> <p>Certified copy of a tax clearance certificate is still required by Foreign suppliers (with a footprint in South Africa- but who are not on CSD and have not provided a SARS pin number) and Local suppliers (who have not provided their SARS e-filing PIN number for verification by Elundini Local Municipality and/or their CSD profile / CSD number) . Foreign suppliers (even those with no deemed footprint in South Africa) must still complete the relevant section in Part A of the MBD1 document, however, no proof of tax compliance is required if the supplier answers "no" to all questions. If they answer "yes" to any of the questions, however, they are required to register and be tax compliant as per Part B- section 2 of the MBD 1 document and relevant legislation governing tax compliance.</p> <p>Upon submission of a bid/quote/proposal the bidder automatically grants confirmation that SARS may, on an ongoing basis during the contract term disclose the bidders Tax Compliance status to the municipality.</p> <p>Each party to a Consortium/Joint Venture shall submit a separate valid Tax Clearance Certificate and must be compliant with SARS</p> <p>Prices must always be VAT inclusive where applicable.</p>
24	<p>Registration on Accredited Supplier Database</p> <p>It is expected of all prospective service providers who are not yet registered on the Central Supplier Database to register online (www.csd.gov.za) and verify their company information Elundini Municipality Database Department. The Elundini Municipality reserves the right not to award proposals to prospective suppliers who are not registered on the CSD (Central Supplier Database).</p>
25	<p>BBBEE Certificate</p> <p>For the proof of B-BBEE status level of contributor the bidder must submit an original or certified copy of a valid verification certificate from a verification agency accredited by SANAS and recognized as an Accredited B-BBEE Verification Agencies (www.sanas.co.za/afdirectory/bbbee_list.php) or original or certified completed AFFIDAVIT downloaded from www.thedti.gov.za/economic_empowerment/bee_codes.jsp</p>
26	<p>Municipal Rates, Taxes and Charges</p> <p>The bidder to provide their municipal account of rates and taxes of both the Bidding entity and its directors' in its Bid Document submission. Any bidder which is or whose directors are in arrear with their municipal rates and taxes due to any Municipality within South Africa for more than three months and have not made an arrangement for settlement of or same before the bid closure date will be disqualified.</p> <p>If the bidder is renting the office a Lease Agreement must be attached to the bid document OR Affidavit from SAPS stating that the bidder is not obliged to pay municipal rates with a letter from a ward Councilor is submitted with the tender document.</p>
27	<p>Tenderer must put initials at the bottom of each page of the tender document as proof that the bidder has reviewed and agreed to the contents of the tender data. This also prevents and ensures that various parties involved do not change and / or replace any page and modify the contents after the submission of the tender.</p> <p>Tenderer must sign the original and all copies of the tender offer where required in terms of the tender data.</p> <p>NOTE: The employer holds all authorized signatories liable on behalf of the tenderer.</p>

28	<p>The employer's details and address for delivery of tender offers and identification details that are to be shown on each tender offer package are:</p> <p>Location of tender box: Elundini Local Municipality Finance Department</p> <p>Physical address: 1 Seller Street Nqanqarhu 5480</p> <p>Identification details : Tender no, Title of Tender and the closing date and time for tenders</p> <p>Closing Date : Monday, 23 October 2023</p> <p>Closing Time : 12H00</p> <p>The tender box is only open on weekdays between 08:00 and 16:00</p>
29	<p>Where a two-envelope system is required in terms of the tender conditions, place and seal the returnable documents listed in the tender conditions in an envelope marked "financial proposal" and place the remaining returnable documents in separate envelope marked "technical proposal". Each envelope shall state on the outside the Elundini Municipality's address and identification details of the bid, as well as the tenderer's name and contact address.</p> <p>Accept that the Elundini Municipality shall not assume any responsibility for the misplacement or premature opening of the tender offer if the outer package is not sealed and marked as stated.</p> <p>Where stated in the tender conditions that a two-envelope system is to be followed, open only the technical proposal of tenders in the presence of tenderers' agents who choose to attend at the time and place stated in the tender conditions and announce the name of each tenderer whose technical proposal is opened.</p> <p>Employer shall evaluate the quality of the technical proposals offered by tenderers, then advise tenderers who have submitted responsive technical proposals of the time and place when the financial proposals will be opened. Open only the financial proposals of tenderers, who have submitted responsive technical proposals in accordance with the requirements as stated in the tender conditions, and announce the total price and any preferences claimed. Return unopened financial proposals to tenderers whose technical proposals were non-responsive.</p>
30	Telephonic, telegraphic, telex, facsimile or e-mailed tender offers will not be accepted.
31	The closing time for submission of tender offers is as stated in the Tender Notice and Invitation to Tender.
32	The tender offer validity period is 12 weeks . The validity of bids may be further extended by a period of not more than six months upon approval by the Accounting Officer.
33	<p>The tenderer shall provide clarification of a tender offer during the evaluation of tender offers, in response to a request from the employer to do so.</p> <p>Such clarifications can include providing a breakdown of rates or prices and correction of arithmetical errors by the adjustment of certain rates or item prices (or both). No change in the competitive position of tenderers or substance of the tender offer is sought, offered, or permitted.</p> <p>Note: This clause does not preclude the negotiation of the final terms of the contract with a preferred tenderer following a competitive selection process, should the Elundini Municipality elect to do so. Failure, or refusal, to provide such clarification or additional information within the time for submission stated in the Elundini Municipality's written request may render the tender non-responsive.</p>
34	The employer shall grant during working hours to premises for inspections, tests and analysis, as provided for in the tender data.

35	<p>A tenderer may request in writing, after the closing date, that the tender offer be withdrawn.</p> <p>Such withdrawal will be permitted or refused at the sole discretion of the Elundini Municipality after consideration of the reasons for the withdrawal, which shall be fully set out by the tenderer in such written request for withdrawal. Should the tender offer be withdrawn in contravention hereof, the tenderer agrees that:</p> <ul style="list-style-type: none"> it shall be liable to the Elundini Municipality for any additional expense incurred or losses suffered by the Elundini Municipality in having either to accept another tender or, if new tenders have to be invited, the additional expenses incurred or losses suffered by the invitation of new tenders and the subsequent acceptance of any other tender; the Elundini Municipality shall also have the right to recover such additional expenses or losses by set-off against monies which may be due or become due to the tenderer under this or any other tender or contract or against any guarantee or deposit that may have been furnished by the tenderer or on its behalf for the due fulfilment of this or any other tender or contract. Pending the ascertainment of the amount of such additional expenses or losses, the Elundini Municipality shall be entitled to retain such monies, guarantee or deposit security for any such expenses or loss.
36	<p>Samples, Inspections, tests and analysis</p> <p>Provide access during working hours to premises for inspections, tests and analysis as provided for in the tender conditions or specifications.</p> <p>If the Specification requires the tenderer to provide samples, these shall be provided strictly in accordance with the instructions set out in the Specification.</p> <p>If such samples are not submitted as required in the bid documents or within any further time stipulated by the Elundini Municipality in writing, then the bid concerned may be declared non-responsive.</p> <p>The samples provided by all successful bidders will be retained by the Elundini Municipality for the duration of any subsequent contract. Bidders are to note that samples are requested for testing purposes therefore samples submitted to the Elundini Municipality may not in all instances be returned in the same state of supply and in other instances may not be returned at all.</p> <p>Unsuccessful bidders will be advised by the Project Manager or dedicated ELM Official to collect their samples, save in the aforementioned instances where the samples would not be returned.</p>
37	<p>Compliance with Occupational Health and Safety Act, 85 of 1993</p> <p>Tenderers are to note the requirements of the Occupational Health and Safety Act, 85 of 1993. The Tenderer shall be deemed to have read and fully understood the requirements of the above Act and Regulations and to have allowed for all costs in compliance therewith.</p> <p>In this regard the Tenderer shall submit upon written request to do so by the Elundini Municipality, a Health and Safety Plan in sufficient detail to demonstrate the necessary competencies and resources to deliver the goods or services all in accordance with the Act, Regulations and Health and Safety Specification.</p>
38	<p>Claims arising from submission of tender</p> <p>The tenderer warrants that it has:</p> <ul style="list-style-type: none"> inspected the Specifications and read and fully understood the Conditions of Contract. read and fully understood the whole text of the Specifications and Price Schedule and thoroughly acquainted himself with the nature of the goods or services proposed and generally of all matters which may influence the Contract. visited the site(s) where delivery of the proposed goods will take place, carefully examined existing conditions, the means of access to the site(s), the conditions under which the delivery is to be made, and acquainted himself with any limitations or restrictions that may be imposed by the Municipal or other Authorities in regard to access and transport of materials, plant and equipment to and from the site(s) and made the necessary provisions for any additional costs involved thereby. requested the Elundini Municipality to clarify the actual requirements of anything in the Specifications and Price Schedule, the exact meaning or interpretation of which is not clearly intelligible to the Tenderer Escalations and escalations rates are clearly disclosed. received any notices to the tender documents which have been issued in accordance with the Elundini Municipality's Supply Chain Management Policy. <p>The Elundini Municipality will therefore not be liable for the payment of any extra costs or claims arising from the submission of the tender.</p>
39	<p>Employer's Undertaking</p>

40.1	The employer will respond to requests for clarification received up to Five (5) working days before the tender closing time.
40.2	<p>The employer shall issue addenda until before tender closing time</p> <p>If necessary, the employer shall issue addenda in writing that may amend or amplify the tender documents to each tenderer during the period from the date the tender documents are available until Five (5) working days before the tender closing time stated in the Tender Data. The Employer reserves its rights to issue addenda less than Five (5) working days before the tender closing time in exceptional circumstances If, as a result a tenderer applies for an extension to the closing time stated on the front page of the tender document, the Elundini Municipality may grant such extension and, shall then notify all tenderers who drew documents.</p> <p>Notwithstanding any requests for confirmation of receipt of notices issued, the tenderer shall be deemed to have received such notices if the Elundini Municipality can show proof of transmission thereof via electronic mail, facsimile or registered post.</p>
40.3	<p>Tenders will be opened immediately after the closing time for tenders as stated in the Tender Notice and Invitation to Tender. If requested by any bidder present, names of the bidders, and if practical the total amount of each bid and of any alternative bids will be read out loud.</p> <p>Bids received in time recorded and entered in a register which is open for public inspection.</p>
40.4	Late bids will be registered and returned unopened unless the bidder did not clearly specify their address at the back of the envelope.
40.5	The employer or any of its employees must not disclose to tenderers, or to any person not officially concerned with such processes, information relating to the evaluation and comparison of tender offers, the final evaluation price and recommendations for the award of a contract, until after the award of the contract to the successful tenderer
40.6	Make available a record of the details announced at the tender opening meeting on the Elundini Municipality's website (www.elundini.gov.za)
40.7	<p>Bids must be evaluated in terms of their responsiveness to the bid specifications, requirements as well as criteria as set out in the bid document.</p> <p>Any additional criterial as per communicated addendum shall be considered.</p> <p>The Elundini Municipality reserves the right to withdraw any invitation to submit a bid and/or to re-advertise or to reject any bid or to accept a part of it.</p> <p>The Elundini Municipality does not bind itself to accepting the lowest bid</p>
40.8	<p>Determine, after opening and before detailed evaluation, whether each tender offer that was properly received</p> <ul style="list-style-type: none"> a) complies with the requirements of the standard conditions of tender in this part b) has been properly and fully completed and signed, and c) is responsive to the other requirements of the tender documents. <p>A responsive tender is one that conforms to all the terms, conditions, and scope of work of the tender documents, without material deviation or qualification. A material deviation or qualification is one which, in the employer's opinion, would</p> <ul style="list-style-type: none"> a) detrimentally affect the scope, quality, or performance of the works, services or supply identified in the scope of work, b) significantly change the employer's or the tenderer's risks and responsibilities under the contract, or c) affect the competitive position of other tenderers presenting responsive tenders if it were to be rectified. <p>Reject a non-responsive tender offer, and do not allow it to be subsequently made responsive by correction or withdrawal of the non-conforming deviation or reservation.</p>
40.9	<p>Due Diligence</p> <p>The municipality will conduct intense due diligence which must include inspection of the claimed experience of the preferred bidder(s).</p> <p>The municipality will provide due diligence form which will be used for the assessment purposes of the claimed project experience.</p>

Pricing**Arithmetical errors, omissions and discrepancies**

Check responsive tenders for discrepancies between amounts in words and amounts in figures. Where there is a discrepancy between the amounts in figures and the amount in words, the amount in words shall govern.

If pricing schedules apply and there is an error in the line item total resulting from the product of the unit rate and the quantity, the line item total shall govern and the rate shall be corrected. Where there is an obviously gross misplacement of the decimal point in the unit rate, the line item total as tendered shall govern, and the unit rate shall be corrected.

Where there is an error in the total of the prices either as a result of other corrections required by this checking process or in the tenderer's addition of prices, the total of the prices shall govern and the tenderer will be asked to revise selected item prices (and their rates if Price Schedules apply) to achieve the tendered total of the prices.

Consider the rejection of a tender offer if the tenderer does not correct or accept the correction of the arithmetical error in the manner described above.

Other

For Vat related discrepancies, National and Provincial Treasury prescripts in relation to VAT procedures apply.

Unconditional discounts must be taken into account for evaluation purposes

The Employer must evaluate whether tender has offered a market related offer. If the offer is believed not to be market related, the Municipality through its Supply Chain Management bid committees will attempt to negotiate the offer with identified bidder/s to a reasonable amount. Bidders are not allowed to increase their tender offers during this process

In the event of tendered rates or lump sums being declared by the Elundini Municipality to be unacceptable to it because they are not priced, either excessively low or high, or not in proper balance with other rates or lump sums, the tenderer may be required to produce evidence and advance arguments in support of the tendered rates or lump sums objected to. If, after submission of such evidence and any further evidence requested, the Elundini Municipality is still not satisfied with the tendered rates or lump sums objected to, it may request the tenderer to amend these rates and lump sums along the lines indicated by it.

The tenderer will then have the option to alter and/or amend the rates and lump sums objected to and such other related amounts as are agreed on by the Elundini Municipality, but this shall be done without altering the tender offer in accordance with this clause. Should the tenderer fail to amend his tender in a manner acceptable to and within the time stated by the Elundini Municipality, the Elundini Municipality may declare the tender as non-responsive.

Bidder must comply with all pricing instructions as stated on the Price Schedule and tender conditions.

All prices must include VAT where applicable

The Elundini Municipality may, after the closing date, request additional information or clarification from tenderers, in writing on any matter affecting the evaluation of the tender offer or that could give rise to ambiguity in a contract arising from the tender offer, which written request and related response shall not change or affect their competitive position or the substance of their offer. Such request may only be made in writing by the delegated official using any means as appropriate and such communication must be approved by the Accounting Officer.

TECHNICAL PROPOSAL**EVALUATION OF TENDER OFFERS****PHASE 1 OF STAGE ONE: TEST FOR RESPONSIVENESS TO THE BID REQUIREMENTS AND RULES**

Bidders' proposals must meet the following minimum requirements and supporting documents must be submitted with the completed bid document in a sealed envelope in the bid box at the closing date and time. Failure to comply will automatically eliminate the bid for further consideration.

1. Bid Document (This Document) must be submitted in its original format.
2. Bids which are late, incomplete, unsigned or submitted by facsimile or electronically, will not be accepted.
3. A copy of the Central Supplier Database report showing, amongst other things, that tax matters of the service provider are in order with the South African Revenue Services.
4. Bidders must be a registered legal entity or partnership or consortia or joint ventures with a signed agreement in place with a consolidated BBEE Certificate.
5. Form of offer and Acceptance (fully completed and signed)
6. Invitation to bid must be completed and signed.
7. Declaration of Interest (fully completed and signed)
8. Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (fully completed and signed)
9. Declaration of Bidder's past Supply Chain Management Practices. (Completed and signed)
10. Certificate of Independent Bid Determination. (Completed and signed)
11. Compulsory Enterprise Questionnaire (Completed and signed)
12. Elundini Municipality Ethics Commitment form for Suppliers (Completed and signed)
13. Proof of Authority of Signatory
14. Declaration of Employees of the State or other State Institutions.
15. Proof of attendance of clarification meeting, an attendance register will be circulated for record purposes.
16. A valid original or certified copy of B-BBEE certificate must be submitted with the bid OR a valid original or certified copy of a Sworn Affidavit attested by a Commissioner of Oaths prepared and issued in terms of the amended B-BBEE Construction Sector Codes (CSC000) must be submitted in order to qualify for preference points for B-BBEE. Failure to comply with this, will automatically results in the non-awarding of points for B-BBEE. (This is not an Elimination factor).
17. On financial Proposal: All Items listed in the Bills of Quantities or Pricing schedule must be priced for failure to do so will increase commercial risk of the bid and may lead to elimination or passing over of the bidder.
18. If the offer (any of the items quoted for) is "Vat Inclusive", the VAT registration number of service provider must be indicated. Bidders are not entitled to claim the VAT if they are not VAT registered.
19. A Resolution of signatory form has been completed and signed by director/s or a letter bearing a letterhead of the tenderer has been attached (specific to this bid) to the bid submission; it must be duly signed by all directors and submitted the bid. Only a duly authorized official can sign the bid.

STAGE TWO:**EVALUATION OF QUALITY/FUNCTIONALITY**

The quality criteria and maximum score in respect of each of the criteria in accordance with 5.11.9 are as follows:

Evaluation Criteria	Points
Municipal Valuer must comply with Section 39 (1) of the MPRA Registered as a professional valuer or professional associated valuer in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000 with experience as a municipal Valuer	30
Experience of Tendering Company in conducting major Valuation work	15
Skills transfer programme	5
Human resources capacity	15
Back-up and recovery plan	5
Public Participation Plan	5
Quality Assurance Plan	5
Insurance	5
Valuation Roll Management System (VRMS) Accreditation.	5
General Valuation Project plan and implementation methodology	10
Total Points	100

A minimum number of evaluation points for quality is **70 Points** . Any bidder who fails to meet the minimum qualifying score will not be considered further for evaluation on Price and Preference.

Scoring Quality

The quality criteria and maximum score in respect of each of the criteria are as follows:

Criteria	Sub criteria	Points
Municipal Valuer must comply with Section 39 (1) of the MPRA Registered as a professional valuer or professional associated valuer in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000 with experience as a municipal Valuer	Municipal Valuer must be registered as a professional Valuer or professional Associated valuer (with no restrictions), with a valid registration with the SACPVP. The certificate of registration will serve as an evidence Proof of registration with SACPVP = 15 points No proof of registration = 0 points Experience on completion of General Valuation (GV) Projects as Municipal Valuer in a Municipality 3 GVs and above = 15 1 to 2 GVs = 10 Less than 1 = 0 (Signed Reference OR signed Recommendation letters OR Letters of Completion of completed GV projects from clients must be attached and CV of Municipal Valuer with references)	30
Experience of Tendering Company in conducting major Valuation work	Proof of evidence from clients demonstrating major valuation work that has been conducted over the past years in terms of the MPRA. Signed Reference OR signed recommendation letters OR Letters of Completion on completed Major Valuation Projects: 3 Valuations and above = 15 1 to 2 Valuations = 10 Less than 1 = 0	15
Skills transfer programme	A detailed plan on the skills transfer program (Coaching and mentoring of in-house staff) Skills transfer Plan = 5 points No Skills transfer Plan = 0 points	5
Human resources capacity	The Bidder must provide registered and experienced human resources and must demonstrate sufficient experience and ability in the bid project deliverables and scope of work. Clear HR plan and organogram which includes registered and experienced nominated person/s with relevant Certificate of qualification as recognised by SAQA and CV nominated person/s = 15 Points Plan Not clear and does not cover minimum personnel useful in Project Deliverables = 0 Points	15
Back-up and recovery plan	Provision of the specified back-up and recovery plan. Proof of Back-up and recovery plan = 5 points No proof of Back-up and recovery plan = 0 points	5

Public Participation Plan	Provision of an implementation plan for the specified public participation plan with media examples and time-frames. Public Participation Plan = 5 points No Public Participation Plan = 0 points	5
Quality Assurance Plan	Provision of a Quality Assurance Implementation Plan with project phase details and process flow Quality Assurance Plan = 5 points No Quality Assurance Plan = 0 points	5
Insurance	The Bidder must submit proof of Professional Indemnity Insurance to the amount of contract tendered Proof of insurance = 5 points No proof of insurance = 0 points	5
Valuation Roll Management System (VRMS) Accreditation.	Partnership certificate or letter from the distributor confirming supply of Valuation Roll Management System License. Proof of VRMS = 5 points No proof of VRMS = 0 points	5
General Valuation Project plan and implementation methodology	The bidder must provide a clear general valuation project plan and implementation methodology which must cover methods to be applied to different categories of properties. project plan and methodology which covers the Implementation Plan with project phase details and process flow of Valuation rolls = 10 Points No clear plan that covers methods to be applied to different categories of properties = 0 Points.	10
Maximum possible score for quality (M _s)		100

NB: Only bidders who achieved the minimum qualifying score of 70% are opened and evaluated further for price and specific goals

44	<p>Tender offers will only be accepted if:</p> <ol style="list-style-type: none"> a) Submits a valid SARS Tax Clearance Certificate or/and a tax compliance status document reflecting the pin for the Employer to verify that the tenderer is in good standing. b) Bidder submits Company registration certificates c) Bidder submits Certified ID copies of the directors d) Bidder provides and attach evidence of the development, with contactable references confirming two (2) commercial developments stated in the CV (Mall, Office Park). The value of the completed projects must be in the value of R 50 million up each. e) Bidders provides valid proof of one anchor tenant alongside with letter of intent thereof. f) Bidders provides letter of intent from tenants to rent from a minimum of 5 National Footprint. g) Bidders provides Audited or independently reviewed financial statements by a firm of registered auditors for the past three financial years with a current ratio being equal to (2) two or higher. h) Bidders provides Pre- funding letter from reputable financial institution (FSP Registered Institution) for the value of the proposed building or confirmation of the availability of funding to undertake the project. i) Joint ventures must be incorporated JV j) the tenderer is registered on the Central Supplier Database (CSD) for the South African government (see https://secure.csd.gov.za/) unless it is a foreign supplier with no local registered entity k) Prospective bidders must register on CSD prior submitting bids (open tenders). Any prospective bidder found to have Tax matters not in order with SARS (verified through CSD) during the evaluation process (after being given an opportunity to rectify tax matters) will be eliminated and not be considered further in the process. Preferred bidder/s will be afforded an opportunity to rectify their tax affairs within 7 days. A bidder that fails to rectify its tax matters with SARS will be eliminated. l) the tenderer or any of its directors/shareholders is not listed on the Register of Tender Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 as a person prohibited from doing business with the public sector. m) the tenderer has not: <ol style="list-style-type: none"> i) abused the Employer's Supply Chain Management System; or ii) failed to perform on any previous contract and has been given a written notice to this effect; and n) the tenderer has completed the Compulsory Enterprise Questionnaire and there are no conflicts of interest which may impact on the tenderer's ability to perform the contract in the best interests of the employer or potentially compromise the tender process and persons in the employ of the state are permitted to submit tenders or participate in the contract; o) the tenderer is not more than three months in arrears in its municipal rates and taxes or municipal service charges, if applicable. Proof of payment to be supplied. Where no municipal rates are applicable, a proof of residence from the Councillor and a Sworn Affidavit from the SAPS stating that the tenderer is not liable for municipal rates must be supplied. p) the tender has offered a market related offer. If the offer is believed not to be market related, the Municipality through its Supply Chain Management bid committees will attempt to negotiate the offer with identified bidder/s to a reasonable amount. Bidders are not allowed to increase their tender offers during this process. q) A Resolution of signatory form has been completed and signed by director/s or a letter bearing a letterhead of the tenderer has been attached (specific to this bid) to the bid submission; it must be duly signed by all directors and submitted the bid. Only a duly authorized official can sign the bid. r) The Municipality reserves the right not to award the bid to the most favourable tenderer, if any of the situations occur if:- <ul style="list-style-type: none"> • the bidder has been awarded a considerable number of projects by the Municipality. • as performed unsatisfactorily in the past. • Does not meet objective criteria s) Reject a bid where a tenderers submit more than one tender either individually or as a partner in a joint venture (JV) or consortium. t) Reject a bid where thee tender submitted by a JV or consortium where the JV/consortium agreement does not explicitly state that the parties of the JV or consortium shall be jointly and severally liable for the execution of the Contract in accordance with the Contract terms. <ul style="list-style-type: none"> • Where a bidder or its directors has previously failed to perform in the previous order where notices of poor performance were issued or application for restriction has been lodged with National Treasury in terms of SCM Regulation 38.
45	<p>PHASE 2 OF STAGE ONE: TECHNICAL PROPOSAL</p> <p>DUE DILIGENCE</p> <p>The municipality will conduct intense due diligence which must include inspection of the claimed experience of the preferred bidder(s).</p> <p>The municipality will provide due diligence form which will be used for the assessment purposes of the claimed project experience.</p>

46	<p>Risk Analysis</p> <p>Notwithstanding compliance with regard to any requirements of the tender, the Elundini Municipality will perform a risk analysis in respect of the following:</p> <ul style="list-style-type: none"> a) reasonableness of the financial offer b) reasonableness of unit rates and prices c) the tenderer's ability to fulfil its obligations in terms of the tender document, that is, that the tenderer can demonstrate that he/she possesses the necessary professional and technical qualifications, professional and technical competence, financial resources, equipment and other physical facilities, managerial capability, reliability, capacity, experience, reputation, personnel to perform the contract, etc.; the Elundini Municipality reserves the right to consider a tenderer's existing contracts with the Elundini Municipality in this regard. d) any other matter relating to the submitted bid, the tendering entity, matters of compliance, verification of submitted information and documents, etc. e) there is any history/record of the tenderer/s (or any of its directors/members/shareholders) failing to meet their contractual obligation with any Organ Of the State and where there are notices of poor performance issued thereof. [Note: Companies/persons who are listed on the Database were informed in writing of this restriction by the Authority/Accounting Officer of the institution that imposed the restriction after the <i>Audi alteram partem</i> rule was applied]. f) tenderer/s (or any of its directors/members/shareholders) listed on National Treasury's Database of Restricted Suppliers as companies/persons prohibited from doing business with the public sector [Note: Companies/persons who are listed on the Database were informed in writing of this restriction by the Authority/Accounting Officer of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied]. The Database of Restricted Suppliers can be accessed on the National Treasury's website (www.treasury.gov.za). g) tenderer/s (or any of its directors / members / shareholders)? listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combatting of Corrupt Activities Act (No 12 of 2004) h) tenderer/s (or any of its directors/members/shareholders) convicted by a court of law (including a court outside South Africa) for fraud and/or corruption with respect to the procurement/tendering processes/procedures during the past five years? i) the tenderer/s employees/directors are also employees/contractors/consultants or directors in the organ of state. <p>The conclusions drawn from this risk analysis will be used by the Elundini Municipality in determining the acceptability of the tender offer.</p> <p>No tenderer will be recommended for an award unless the tenderer has demonstrated to the satisfaction of the Elundini Municipality that he/she has the resources and skills required.</p>
47	The number of paper copies of the signed contract to be provided by the employer is one.
48	<p>Incorrect Information</p> <p>Where a contract has been awarded on the strength of the information furnished by the bidder which, after the conclusion of the relevant agreement, is proved to have been incorrect, the Elundini Municipality may, in addition to any other legal remedy it may have, recover from the contractor all costs, losses or damages incurred or sustained by the Municipality as a result of the award of the contract</p>
49	If after the commencement of the Contract, there is any amendment in the key personnel from which bid evaluation was based, within 90 days of first having become aware of the change, the Contractor must furnish the Employer with detailed justification to change of key personnel, which might be accepted or not accepted by the employer depending on its discretion and the level of skill of personnel used for the replacement.

TERM OF REFERENCE

Project Name

GENERAL VALUATION AND PREPARATION OF A VALUATION ROLL FOR IMPLEMENTATION 1 JULY 2025 AND PREPARATION AND UPDATING OF THE VALUATION ROLL FOR THE PERIOD 1 JULY 2024 TO 30 JUNE 2027

Project Description

- (1) The **Elundini Municipality is looking to appoint experienced and suitably qualified Service Provider** to perform the functions of a municipal valuer in terms of the MPRA which includes the following –
- (a) create a property register;
- (b) undertake a general valuation and prepare a valuation roll of all rateable properties within the following Elundini's area of jurisdiction: -
- Nqanqarhu Town
 - Tlokoeng Town
 - Ugie Town
 - All surveyed areas in the Maclear RD, Mount Fletcher RD, Tsolo RD, Qumbu RD located within the area of jurisdiction of Elundini Local Municipality.
 - Rural Farms-Villages (Government Institutions e.g. Schools, Clinics, etc)
 - Public service infrastructure
 - Agricultural land
 - Portions of agricultural land used for other than agriculture
- (c) capture / upload all necessary data to a valuation roll management system (VRMS);
- (d) Review of the Rates Policy and by-laws in terms of the Act in regard to valuation matters;
- (e) assist with the resolution of objections by review;
- (f) assist with the resolution of appeals;
- (g) undertake valuation roll maintenance and prepare supplementary valuation rolls;
- (h) provide systems and reporting to support the valuation roll;
- (i) supply of any other valuation related services in compliance with The Local Government: Municipal Property Rates Act, 2004 (No. 6 of 2004) as amended and;
- (j) prepare and submit reports to the municipality on the valuation roll.
- (2) The successful service provider must commit themselves to strict confidentiality both during and after valuations task. Service provider must ensure that no conflict of interest occurs during the valuation process and if any potential conflict arises, the Tenderer must advise municipality accordingly.
- (3) The successful service provider must take account of legislation and all amendments including regulations and implement the amendments in consultation with the municipality. The municipality therefore reserves the right to review the contractual obligations of the successful service provider to ensure compliance with legislative amendments.

For information, the MPRA has been amended since its promulgation as follows –

- No. 6 of 2004: Local Government: Municipal Property Rates Act, 2004 on 17 May 2004.
- No. 19 of 2008: Local Government Laws Amendment Act, 2008 on 13 October 2008.
- No. 19 of 2009: Local Government: Municipal Property Rates Amendment Act, 2009 on 26 November 2009.
- No. 29 of 2014: Local Government: Municipal Property Rates Amendment Act, 2014 on 18 August 2014.
- No. 77 of 2014: Local Government: Municipal Property Rates Amendment Act, 2014 on 28 November 2014.

Project Background

The General Valuation Roll is in terms of Section 32(1) of the Municipal Property Rates Act 6 of 2004 as amended, valid for a period of five financial years. Elundini General Valuation Roll 2017-2024 is now on its final year of its validity and will expire on 30 June 2025. In terms of Section 32 (2) of the Municipal Property Rates Act 6 of 2004 as amended, the MEC for Local Government in a province may extend the period for which a valuation roll remains valid to seven years.

Scope of Work/ Deliverables

Bidders are invited from experienced and suitably qualified Bidder(s) to compile and maintain valuation roll/s and 1st compulsory supplementary valuation roll.

Bidder(s) will be required to compile a General Valuation Roll and 1st compulsory Supplementary Valuation Roll in terms of Local Government Municipal Property Rates Act as amended (Act 29 of 2014) for the period:-

1 July 2024 to 30 June 2027 In addition to compiling the said valuation rolls, Bidder(s) appointed will be required to assist municipality in:-

1	The preparation of the Rates Policy in terms of the Act in regard to valuation matters.
2	Community Participation and Public Awareness relating to the valuation and objection process.
3	Attending to Valuation Enquiries on behalf of the municipality.
Bidder(s) appointed will be required to undertake the following functions and/or services:-	
4	Valuation rolls of different categories of properties in terms of Section 8(2).
5	Valuation of multiple purpose properties in terms of Section (9) and the review thereof, if so required by municipality.
6	Exemptions, reductions or rebates in terms of Section 15 and the reviews thereof, if required by municipality.
7	Compile valuations in terms of Section 7(1) and subject to the provisions of Section 30(2), where applicable
8	Compliance with the provisions of Section 30.
9	Compile the valuation rolls as at date of valuation in terms of Section 31.
10	Comply fully with Section 34 – Functions of Municipal Valuer.
11	Section 36 – Data Collectors. Assume responsibility for their performance.
12	Comply with Section 37 – Delegation where applicable and if necessary.
13	Comply with Section 39 – Qualifications of Municipal Valuers
14	Comply with Section 40 – Prescribed Declarations.
15	Comply with Section 41 – Inspection of property within defined days and times.
16	Comply with Section 42 – Access to Information
17	Comply with Section 43 – Conduct of Valuers.
18	Comply with Section 44 – Protection of Information.
19	Comply with Section 45 – Valuation methodology and Section 13 hereof.
20	Comply with Section 46 – General basis of valuation.
21	Comply with Section 47 – Sectional Title Schemes.
22	Comply with Section 48 – Content of valuation roll including any additional information that the municipality may require in terms of this tender.
23	Comply with Section 51 – Processing of objections, if so required by municipality.
24	Comply with Section 52(1)(3) – Compulsory review.

25	Comply with Section 53 – Notification.
26	Comply with Section 69 – Decision of Valuation Appeal Board and Section 34(f).
27	Comply with Section 78 – Supplementary valuations including annual reviews of multiple properties in terms of Section 9 and properties affected in terms of Section 15 of the Act, if so required by municipality.
28	<p>Comply with Act 29 of 2014 of MPRA, Section 81 as amended & 82 of the Act. Bidder(s) shall provide and make available all data and valuations for purposes of internal monitoring by the municipality as well as monitoring by the MEC for local government in terms of Section 81(1)(1A) of the Act and the Minister in terms of Section 82(1) of the Act as amended.</p> <p>Such data will be available in a format that is easy to read, understand and interpret.</p>

1. LEGISLATIVE CHANGES

The Bidder is hereby advised that the MPRA and its implementation is governed by legislation which may change and be amended from time to time and which may be promulgated during the contract period. The municipality therefore reserves the right to review the contractual obligations of the successful service provider to ensure compliance with the MPRA amendments.

2. INFORMATION TO BE PROVIDED BY THE MUNICIPALITY

(1) The current valuation roll was implemented on 1 July 2018 and will expire on 30 June 2025.

During the period of the valuation roll, five (5) supplementary valuation rolls have been produced with the last supplementary valuation roll having been published in the provincial gazette in terms of the MPRA section 49 on 2021-09-13. The estimated properties as per the previous valuation roll is as follows:

Valuation Summary is as follows:

Category	Estimated number of properties
Residential	4533
Vacant sites	314
Residential Municipal owned	4124
Residential with business	81
Business	194
Industrial	17
Property owned by an Organ of State and used for Public Service Purpose	238
Public service Infrastructure	182
Municipal owned properties	363

Public open space	67
Churches	37
Agriculture	1008
Mining	2

(2) An electronic extract of the current valuation roll (Part A) consolidated shall be made available by the municipality.

(3) The municipality takes no responsibility for the accuracy of the data and information provided in terms of the bid.

3. PROJECT START DATE

The successful service provider must be ready to assume work on date of appointment by the municipality.

4. ELIGIBILITY CRITERIA.

4.1 COMPULSORY HUMAN RESOURCES AND COMPETENCIES REQUIRED TO QUALIFY AS A SERVICE PROVIDER

(1) The Service Provider must provide a Human Resource Plan for the project with a clear organisational structure and provide named resources, each with their capability profile and CV's, demonstrated knowledge and experience in their assigned function (as per 2(a) to (d)).

(2) The Human resource plan must include the following key human resources:

(a) a Municipal Valuer (Project Leader); registered as a Professional Valuer or Professional Associated Valuer (with no restrictions) with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000) and must have relevant experience.

(b) Assistant Municipal Valuers who must be registered as a Professional Valuer, Professional Associated Valuer or Candidate Valuer with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000);

(c) a GIS manager with GIS certificate and experience in GIS and data management.

(d) data capturers or administrative staff

(3) The company (Bidder) must have compiled and completed at least one supplementary or general valuation roll (Reference from the client worked for).

(4) The Bidder must submit proof of Professional Indemnity Insurance to the amount of contract tendered.

5. MPRA AND VALUATION STANDARDS, QUALITY ASSURANCE AND MONITORING

(1) Steering Committee and project / cost monitoring

The successful Service Provider will be required to attend monthly steering committee meetings at the municipality and prepare and present reports on project progress, and the municipality will measure the progress and project claims against the project work program, the bid pricing, the scope of work and the bid specifications.

Progress claims by the service provider will only be approved once the municipality is satisfied that the bid scope of work has been delivered.

(2) MPRA and Municipal valuation practices, methods and standards

In terms of the MPRA section [s45.] "Valuation" - (1) Property must be valued in accordance with generally recognised valuation practices, methods and standards, and the provisions of the MPRA and regulations.

With reference to the above, the Service Provider must consider and take account of the recognised valuation practices, methods and standards such as the International Valuation Standards (IVS) on valuations, the International Association of Assessing Officers (IAAO) technical standards, as amended from time to time, and in addition the specifications of this bid.

(3) Data collection quality assurance

(a) A data collector must undergo training in data collection and property inspection routines and obtain a pass rate of at least 75% in a proficiency test approved by the municipal valuer, in order to be eligible for designation as a data collector in terms of section 36 (2) of the MPRA.

(b) Data can only be collected by designated data collectors who must record data on the approved data collection forms (field sheets) and in accordance with the approved data collection manuals. Data collection may include the collection of digital photographs. The data collector must record their full name or data collector code on the data collection form.

(c) Data collected must be subjected to quality assurance by an assigned data collector supervisor who must review at least 10% of the properties within a batch by category of property and measured in accordance with the specifications and the approved data collection manuals.

(d) A batch size may not be more than 200 properties.

(e) The methods and definitions employed to collect data contained in the data collection manuals must be used in the quality assurance process to verify the correctness of the data e.g. if digitised aerial photography has been used to determine building area then this must be used in the quality assurance process.

(f) Measures of data quality will be against –

(i) administrative data of the property and ownership,

(ii) category of property; and

(iii) Market, cost, building and land data.

(g) The quality assurance process must compare the original data collected against the quality assurance data collected to identify errors and missing data.

(h) An individual data collection form fails when more than 15% of the critical value forming fields identified by the Municipal Valuer in the data collection manuals are missing or incorrect.

(i) If after quality assurance more than 30% fail then the entire batch must be recollected with quality assurance starting from the beginning.

(j) Missing or errors in data must be corrected on the data collection form.

(k) A designated data collector who after ongoing training, continually produces data collection errors must have their designation withdrawn by the Municipal Valuer.

(l) The Service Provider must where applicable collect and deliver digital photographs of buildings to a specification approved by the municipality which must be uploaded to the relevant property record of the valuation roll.

(m) Notwithstanding s45 (2) (a) of the MPRA which provides that inspections of a property is optional, the municipal valuer must consider the availability and sufficiency of property data in association with its value, and then decide on the merits to physically inspect a property or a group of properties to verify or collect data in order to perform a credible valuation.

(4) Data capture/upload quality assurance

- (a) Data must be captured by batch per data collection form and the data-capturer must record their full name or data-capturer code on the data collection form.
- (b) Data captured must be reviewed for capture errors by checking at least 10% of the data collections forms captured by batch.
- (c) By comparing the data captured on the system to the original data recorded on the hard copy data collection form.
- (d) A data capture form will fail when more than 15% of the critical value forming fields identified by the Municipal Valuer in the data collection manuals are missing or incorrect.
- (e) All missing data or errors identified must be corrected and updated to the valuation roll management system.
- (f) If after quality assurance, more than 30% of the 10% of the data capture forms of a batch have been checked for quality assurance fail, the entire batch must be recaptured and the quality assurance process must be repeated.
- (g) A data-capturer who after ongoing training, continually captures data incorrectly must be withdrawn by the Municipal Valuer.
- (h) Data must be capable of being captured and uploaded to the valuation roll management system in terms of the Bid specifications and extracted for reporting.

(5) Quality control: Data measurement and accuracy

The measurement and accuracy of data for properties recorded in the valuation roll and valued is as follows –

- (a) Area measurement data, such as building size, to be accurate within 10 percent. If areas, dimensions, or volumes must be estimated, the property record should note where quantities are estimated.
- (b) For each objective, categorical, or binary data field to be collected or verified, at least 90 percent of the coded entries should be accurate. Objective, categorical, or binary data characteristics include such attributes as land / building size, number of bedrooms.

As an example, if a data collector collects 10 objective, categorical, or binary data items for 100 properties, at least 900 of the 1,000 total entries should be correct.

For each subjective categorical data field collected or verified, data should be coded correctly at least 90 percent of the time. Subjective categorical data characteristics include data items such as quality grade, physical condition, and architectural style.

- (c) A quality control program is necessary to ensure that data accuracy standards are achieved and maintained. Independent quality control inspections should occur immediately after the data collection phase begins.

The inspection process should review samples of work for completeness and accuracy and keep tabulations of items coded correctly or incorrectly, so that statistical tests can be used to determine whether accuracy standards have been achieved. Stratification by geographic area, property type, or individual data collector can help detect patterns of data error. Data that fails to meet quality control standards should be re-collected.

(d) The accuracy of data should be judged primarily by conformity with written specifications and examples in the data collection manuals.

(e) Data captured onto the valuation roll management system must be reviewed for completeness and correctness by applying the same data quality assurance as data collection.

(6) Maintaining valuation quality and accuracy

Valuation quality and accuracy must be maintained by –

(a) undertaking a sales review;

(b) undertaking a value review;

(c) observing the International Valuation Standards (IVS);

(d) observing the technical standards of the International Association of Assessing Officers (IAAO) as well as any valuation standards, methods and guidelines developed and adopted by EC-COGTA and/or SACPVP.

(e) undertaking a ratio study of valuations to sales prices and other appropriate statistical measures to establish the accuracy of valuations including the relative treatment of higher value and lower value property and report on the consistency and uniformity of values placed on the roll as envisaged by section 82 (2) of the MPRA and in accordance with mass valuation standards and practices.

6. VALUATION ROLL MANAGEMENT SYSTEM (VRMS)

(1) Introduction

A valuation roll management system (VRMS) offered by the service provider must support the production of the property register, the production of valuation rolls, the management of data such as property, valuation and sales, and provides a solution for the valuation of property and the preparation and updating of valuation rolls. VRMS must support the creation, editing, updating, deletion, storage and search of data applicable to systems for valuations of property and rolls.

(2) General functionality

The Service Provider must supply the valuation roll management system (VRMS) in terms of the bid for the duration of the bid and ensure that system functionality, system operability and security of data is maintained to deliver the scope of the bid.

A valuation roll management system must have the ability to export and import data, to record changes and to produce audit reports and must include the following functionality-

a) be able to support the production of the property register (valuation roll), the production of valuation rolls, the management of property, sales and valuation data and the valuation of property.

b) cater for the management, maintenance and production of valuation rolls with reference to the MPRA and these standards.

c) be capable of creating, editing, updating, deleting, archiving, storage and searching of data and records applicable to the valuation roll and must include the property data and sales file records and provide for a full history of any changes for audit purposes.

- d) be capable of storing and accessing the previous valuation roll records and values for any enquiry and for audit purposes.
- e) be able to cater for a unique property identifier for each valuation roll record.
- f) be compatible with industry recommended GIS ESRI software.
- g) be able to integrate with the municipality's financial system with reference to linking by a common unique property identifier to support the synchronisation of the valuation roll and financial management system for rates.
- h) be capable of determining values using applied data for either CAMA or NON-CAMA type methodology.
- i) be able to store and view images, notices and electronic files against records of the valuation roll.
- j) be capable of producing, exporting and extracting valuation rolls and reports of data from the VRMS in electronic format to a spreadsheet, database or CSV format. These reports must be extractable in a flat file format and in accordance with the structure, format and content specified in the bid specifications.
- k) have the functionality of updating the valuation roll with new data or editing data as envisaged in terms of the MPRA, and have the ability of producing reports of all changes reflecting the old and the new information, the difference in the values up or down with the effective date of the change and allow for the capturing of the applicable reason for the change.
- l) be secure with adequate backup of data to ensure that critical valuation data cannot be manipulated or corrupted and that backup data can be accessed, recovered and used in the case of a disaster.
- m) have security and access control in terms of data management.
- n) have management procedure for system changes with audit trails of changes to manage and control.

(3) Compatibility with municipal GIS system

The valuation roll management system must be compatible with the Municipality's GIS software and systems and the ESRI Platform.

(4) Compatibility with municipal financial system

The valuation roll management system must be compatible with the municipality's financial system MUNSOFT to ensure that the roll and financial systems can be and are synchronised.

(5) Storage and maintenance of data

The valuation roll management system must be able to store, maintain, extract and extract All data captured on the valuation roll management system as specified in terms of bid specification document in a flat file format, and must be able to search entries with a full history of any changes for audit purposes. The valuation roll management system must be able to store scanned and electronic files against a property shown in the valuation roll.

(6) Reporting functionality

The valuation roll management system must be capable of producing and extracting the following report types in a format approved by the municipality, typically in electronic format to spreadsheet, database e.g. MS Excel, MS Access or CSV format. The reports must be developed with fields designed according to the requirements of the municipality-

- (a) extract of the valuation roll;
- (b) extract of all valuation roll data including data per property type;
- (c) report of property count per category with market value summary;

- (d) report by exception on missing information;
- (e) report by exception of mismatches of new valuation roll to existing financial system and valuation roll data;
- (f) sales report per homogeneous area.
- (g) generating the valuation roll directly from the valuation system in the required format prescribed by the MPRA and regulations.
- (h) able to generate and print Section 49(1) notices
- (i) able to generate and print Section 78 (5) supplementary valuation notices of review results
- (j) able to generate and print Valuation Certificates
- (k) able to generate and print Section 78 (5) notices of supplementary changes
- (l) able to generate and produce reports as contemplated in terms of section 34 and 81 reporting.

(7) Data from Deeds Office

The valuation roll management system must be capable of updating the valuation roll and property register with Deeds Office updates to support the maintenance of the valuation roll.

(8) Valuation support

The valuation roll management system must be capable of determining values using applied data.

(9) Valuation Roll updates

The valuation roll management system must be capable of updating the valuation roll with new data or edited data for the valuation of property and updating the category of properties as envisaged in terms of section 78 and 79 of the MPRA, be capable producing reports of all changes reflecting old and new information, the difference in the values up or down with the effective date of the change and the capturing of the applicable section 78 reason for the change.

(10) Audit trail

The valuation roll management system must be able to track and report on all changes reflecting the previous record and the new updated record and comply with audit control standards. The Service Provider must ensure that the existing (previous) valuation roll is stored electronically on the main database for cross reference and audit purposes.

(11) Property data take-on and population into VRMS

The Service Provider must, at its own cost take-on existing valuation roll / property data as provided by the municipality on appointment to support the functions of the municipal valuer and updating of the valuation roll, which may be by importing, uploading, capturing or by any other means necessary, and the municipality may perform a quality review to confirm the data take-on.

(12) VRMS provision by municipality

The municipality is entitled to annually review its IT systems and software and may decide to acquire its own system or licence to use a VRMS to support the MPRA, and the successful Service Provider will be required to interface and integrate all necessary valuation roll and property data with the municipality's VRMS at the expense of the municipality.

7. DATA SECURITY AND RECOVERY

(1) Data relating to the valuation roll management must be secure with sufficient backup of data performed to ensure that critical data cannot be manipulated or corrupted and that backup data can be accessed and used in the case of a disaster.

(2) A backup must be made of all data at the end of every Monday, Tuesday, Wednesday and Thursday.

(3) On Friday a backup must be made of all data for the whole week. The weekly backup must be stored off-site, together with the backups of the three preceding weeks.

(4) At the end of every month a backup must be made of all data for the month. The monthly backup must be stored off-site, together with the backups of all preceding months.

8. PROPERTY REGISTER – PART A (VALUATION ROLL)

The service provider must comply with the MPRA and Bid specifications in the preparation, compilation and updating of the property register;

(2) In the context of the bid specifications read with the MPRA, Property Register —means a consolidated valuation roll which comprises (with reference to Section 23 Part “A” of the “register of properties”) the valuation roll, with all properties required to be listed under Section 30 (3), and encompassing;

(i) supplementary valuations and roll updates in terms of sections 78 and 79 of the MPRA;

(ii) objection and appeal decision roll adjustments;

(iii) the corresponding valuation roll property valuation database of all property data, and;

(iv) the corresponding Valuation Roll GIS cadastral layer,

ALL of which must be aligned to the “definition of property” namely (a) registered deeds office records (full title and sectional title), (b) registered rights against immoveable property, (c) land tenure rights, (d) public service infrastructure (PSI) records and all other rateable property by way of apportionment in terms of section 9 of the MPRA;

(3) The designated municipal valuer is responsible and accountable for the accuracy and updating of the property register and must ensure compliance with the requirements of the MPRA and the bid specifications in drawing up and maintaining a register of properties (PART A of the property register) situated in the municipality, which must be in accordance with the MPRA definition of “property”, the definition of “property register” in terms of the MPRA and the bid specification and taking account of the adopted rates policy of the municipality;

(4) The consolidated Valuation Roll must be managed, prepared, maintained in terms of the MPRA content of valuation rolls (s48) and the specified structure, format and content contained in the bid specifications;

(5) The Valuation Roll GIS cadastral layer in ESRI platform must be managed, prepared, maintained in accordance with the bid specifications and the associated GIS attribute table must comply with the specified structure, format and content contained in the bid specifications;

(6) The municipal valuer must in drawing up and maintaining a property register, include all properties required to be listed in the municipality in terms of section 30 (3);

(7) The municipal valuer must in drawing up and maintaining a property register, take into account the rates policy of a municipality which may include properties subject to exemptions and reductions impacting on the valuation roll;

(8) Land extent determination must be as follows –

(a) For registered properties, the land extent from the deeds office must be used as the primary source data for the compilation of the property register however the land extent must be verified and corroborated against the land extent from the corresponding approved property survey diagram in cases of major discrepancies.

(b) For other rateable property such as property that is subject to land tenure rights and public service infrastructure the land extent must be determined with reference to recognised source registers and information.

The land extent verified to be used for the property register (valuation roll) and converted and depicted in square metres (m²).

(c) The determined land extent must then be compared to the calculated GIS extent for each property and major anomalies identified for investigation and correction.

(9) The property register with the corresponding valuation roll GIS cadastral layer must be accurately maintained in accordance with the bid specifications and must include supplementary valuation roll updates;

(10) Each property listed on the property register (valuation roll) must have a captured and maintained unique property identifier, specified as the 21 Digit Surveyor General Code plus 5 suffixed digits = 26 digits, for all defined properties to support linking to other municipal databases such as the financial management system of the specific municipality and the valuation roll GIS cadastral layer.

(11) The valuation roll (consolidated roll) must have a one-to-one match to the Valuation Roll GIS Cadastral Layer (for defined and recognised property), excluding sectional title units within a sectional title scheme and any property which is unreasonably difficult to create and display spatially on the GIS;

(12) All property register and property data prepared and created for the general valuation and updating of supplementary valuation rolls in performing the function of the municipal valuer and all associated property data must be fully extractable in electronic format (database, spreadsheet, excel, csv) in a flat file format from the VRMS on request by the municipality to support budgeting and quality control/assurance in accordance with section 48 "Contents of Rolls".

(13) In the preparation of a general valuation it is essential that the available consolidated valuation roll, the valuation GIS cadastral layer and the financial billing data is considered and applied.

(14) Property register (valuation roll) components and deliverables

The Service Provider must prepare and deliver the following –

(a) an up-to-date property register with the valuation roll (Part A of the register) of the municipality with corresponding property data of all defined rateable property in accordance with the structure, format and content in terms of the bid specifications as certified by the municipal valuer, and any data supplied must be in an electronic format (database, spreadsheet, excel, access or csv) in a flat file format from the VRMS;

(b) an up-to-date valuation roll GIS cadastral layer which must comply with the specifications contained in an ESRI shape file format aligned to the property register database and in accordance with the structure, format;

(c) a report of the mismatches between the valuation roll database and the valuation roll GIS cadastral layer with reasons for mismatches and mismatch corrective action plan, which must be corrected by the service provider;

(d) the original deeds data extract used in the preparation of the valuation roll.

(15) Property register (valuation roll) maintenance and deliverables

- (a) The Service Provider must maintain the valuation roll GIS cadastral layer by correcting any mismatches and updating the valuation roll (Part A of the property register);
- (b) The Service Provider must provide periodic extracts / reports of the consolidated valuation roll with reference to the bid defined "property register" to support the financial budgeting, reconciliation and quality control/assurance of the roll in terms of the MPRA and specifications, and any data supplied must be in an electronic format (database, spreadsheet, excel, access or csv) in a flat file format from the VRMS in accordance with the bid specifications;
- (c) All MPRA and valuation roll extracts and reporting must be in accordance with the bid specifications structure, format and content and any amendments approved by the municipality from time to time.

9. GENERAL VALUATION AND VALUATION ROLL

(1) Introduction

- (a) The Service Provider must undertake a general valuation and prepare a valuation roll of all rateable property in terms of the MPRA and municipal valuations for property rating, taking account of generally recognised practices, methods and standards and the bid specifications.
- (b) The bid specification is to be considered by the bidder to assist the bidder in understanding the availability and confidence of the data and information to support the bid. Notwithstanding the schedule content, the municipality does not accept any responsibility or liability for the quality, accuracy, availability and confidence of the data and information therein either before or after a bid award. No additional costs or variations to the bid relating to data, sales, market reports, GIS, or any other related information will be entertained by the Elundini Local Municipality.
- (c) The basis of valuation is market value in terms of s46 (1) of the MPRA which states "Subject to any other applicable provisions of this Act, the market value of a property is the amount the property would have realised if sold on the date of valuation in the open market by a willing seller to a willing buyer".
- (d) Sufficient resources should be assigned and dedicated to support a general valuation and the updating of valuation rolls to ensure compliance with the MPRA and applicable standards. The municipality reserves the right to review the HR plan submitted by the successful bidder and interview the municipal valuer and professional resources allocated to verify persons and time allocations to support the bid.
- (e) Aerial photography (orthophoto mosaics) must be supplied and delivered by the service provider to the municipality with the certified GV valuation roll in accordance with the bid specifications. For towns and developing areas the imagery must be within 12 months of the date of valuation.

(2) Contents of valuation roll (s48 and regulations)

The particulars in section 48 (2) of the MPRA must be recorded in the valuation roll as well as any additional data specified in the bid under the templates.

(3) Development of categories of property

The Service Provider must assist the Municipality with the development of categories of property prior to the commencement of the general valuation and during the contract period to ensure alignment of the valuation roll and the category of property based on adopted rates policy of the municipality.

(4) Data collection, capture and management

- (a) Valuation / property data must be collected and captured accurately taking account of the data to be collected by property valuation type and the data availability and quality confidence levels, in order for the municipal valuer to determine the market value of all properties which must be included in the valuation roll.
- (b) To support data collection, capture and management the following inspection rules apply–
- (i) At least 10% of the valuation roll records shall be reviewed and if necessary inspected per annum for data verification or recollection for the duration of the contract.
 - (ii) The identification of property for inspection must be at the discretion of the municipal, valuer and may include new buildings, building additions and alterations, illegal buildings, new subdivisions and rates clearances / property sales.
 - (iii) Data corrections must be updated and a supplementary valuation performed where applicable.
 - (iv) The inspections must be recorded on the VRMS to manage and monitor the progress.
- (c) The Service Provider is responsible for data collection and data capture into the valuation roll management system (VRMS) approved by the municipality for the duration of the contract.
- (d) Data municipal valuer must collect, verify and maintain property data for each property required to be valued in a uniform and accurate manner, and in accordance with the minimum data referred to in the bid specifications.
- (e) The municipal valuer must ensure that all property data collected, verified and maintained is captured in a valuation roll management system (VRMS) in accordance with these standards to support data access, extracts and exports on request by a municipality.
- (f) Data collected and captured must be capable of being extracted, reported, checked, audited, verified, monitored and integrated to the rates financial system for the levying of rates.
- (g) The Service Provider must allow access to and provide extracts and copies of ALL data, information, reports, methodology, manuals, CAMA models, and documents during business hours at no additional cost, and for data must be provided in a standard electronic format, i.e. csv, spreadsheet or database, in accordance with the structure, format and content of the bid specifications, upon request by the municipality.
- (h) The Service Provider must develop and provide data collection training manuals and data collection forms per property type, taking account of the data structures, format and contents specified in the bid, prior to the commencement of the data collection phase of the general valuation.
- (i) Aerial photography must comply with the specifications of the bid document and may be used under the following conditions –
- (i) as a visual aid to identify improvements;
 - (ii) to determine building areas by digitising footprints of structures, providing a digitising implementation plan is submitted and approved by the municipal valuer in terms of the data collection manuals;
 - (iii) where the accuracy of valuations will not be prejudiced or subjected to unreasonable risk in the application of mass valuations.

(j) The Service Provider must provide a property access status code against each property captured on the valuation roll management system (VRMS) as following:

- (i) full access (exterior of buildings on site), no access (information from owner),
- (iii) no Access after two failed attempts (view from road),
- (iv) no Access (refused access),
- (v) not inspected (data deemed sufficient for valuation),
- (vi) any other status considered necessary by Service Provider.

(k) Data must be collected by the service provider for new buildings and structures, new properties, ownership changes and errors identified by the municipal valuer and the Municipality from project start date up to 2 months before the final valuation roll is certified.

(l) For supplementary valuations and roll updating, the Service Provider must collect valuation roll property data for changes in terms of section 78 and 79 of the MPRA from the date of last collection / capture (i.e. close off of the GV Roll) and for the duration of the contract.

(m) Objections and appeals lodged must be inspected and property data reviewed /recollected by the service provider to ensure valuation correctness and to support the Valuation Appeal Board decisions for the duration of the contract.

(n) Construction features, characteristics, attachments, ancillary buildings and other recognised improvements for each property must be recorded on the data collection form or field review document. Construction quality and condition must be considered and must be based upon the adopted valuation methodology, training manuals and definitions.

(5) Market Report

(a) The Service Provider and the municipal valuer must research and prepare a market report for every general valuation and for each property sector listed below irrespective of the valuation approach, and the market report must contain researched and analysed market data and comprise the three primary valuation approaches, namely (1) direct sales comparison approach, (2) the income approach and (3) the cost approach. The market reports must be fully motivated and provide methodologies, market data research and the sales, income and cost analysis upon which the general valuation is based per property sector and include the standard units of comparison rates.

The Guidance: Market Report Format and Content to be followed to enhance uniformity and standardisation. All market data, analysis and market evidence must reference to the date of valuation used for the general valuation.

(b) A consolidated market report as envisaged by the bid must be prepared, approved and certified by the municipal valuer and submitted with the certified valuation roll for each general valuation and must at least include the submission of the following –

- 1) Specimen Data collection forms designed, developed, and applied for general valuation.
- 2) Individual spreadsheet or template as developed and approved by the municipal valuer completed with associated value calculations for each property valued individually.
- 3) Full extract of the Deeds office sales for full title and sectional title property used for the general valuation (format - csv, spreadsheet or database).

- 4) Residential property database of sales and proxy sales categorised into "valid" or "invalid" and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).
- 5) Non-Residential Income producing property database of sales and proxy sales categorised into "valid" or "invalid" and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).
- 6) Non-Residential Income producing property market database and research relating to rentals, vacancies, expense ratios, capitalisation rates and any other data required for the determination of market value. (format - csv, spreadsheet or database).
- 7) Agricultural property database of sales and proxy sales categorised into "valid" or "invalid" and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).
- 8) Non-Residential Cost database relating to costs of construction must be sourced from a quantity surveyor to support the determination of the estimated new replacement cost for all non-residential and specialised properties where the cost approach method is applicable. (format - csv, spreadsheet or database).
- 9) Vacant Land database of sales and proxy sales categorised into "valid" or "invalid" and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).

(c) The market report must include researched and analysed sales evidence with documented sales used in the general valuation per homogeneous area. The market report must reflect the market information as at the date of valuation and must include sales cadastral maps in a GIS spatial format (ESRI) shape file which can be accessed by the Municipality and the Valuation Appeal Board.

(d) In homogeneous areas where there are insufficient sales to determine values, proxy sales or control valuations must be conducted by Assistant Municipal Valuers to support the sales data base and computer assisted mass appraisal system or techniques. The proxy sales used as sales must be flagged in the valuation roll management system database for easy identification.

(e) Comparable sales data and market indicators must be documented. In addition, records relating to rentals, vacancies, expense ratios, capitalisation rates, construction costs and any other data that will have an impact on market value must be documented, recorded and analysed.

(f) The physical attributes as they existed at the date of sale may differ from those at the date of inspection when viewed by the Municipal Valuer or an Assistant Municipal Valuer. The report must therefore include reference to any changes that have been identified since the date of sale which would impact on the adjustment to the sale price.

(g) For specialised properties the Service Provider must develop and produce a building cost report relating to the various types of specialised buildings or structures to be valued using the cost approach. In addition, where the profits

and accounts approach is used, a market report must be developed and produced pertaining to the property under valuation.

(h) All analysis must be documented in two stages: version 1 must be submitted at the commencement of the value review phase and version 2 must be delivered with the certified valuation roll. The preparation of the market reports must be supervised by the Municipal Valuer or an Assistant Municipal Valuer and each property sector market report must be approved by the Municipal Valuer.

(i) The Service Provider must prepare and maintain a sales file of all sales reviewed, including proxy sales, analysed and researched for a general valuation to support the market report.

(j) The Service Provider must include all CAMA models, methodologies, calculations and formulas in the market report and submit with the certified valuation roll, where CAMA has been applied.

(6) Valuation

(a) The Service Provider must determine and provide a market value for each property identified in the property register (section 23 - Part A), except for property exclusions from valuation by the Municipality in terms of the MPRA.

(b) The Service Provider must follow and maintain valuation best practice as contemplated in sections 45 and 46 of the MPRA.

(c) The Service Provider may use comparative, analytical and other systems or techniques, including aerial photography and computer assisted mass appraisal CAMA techniques.

(d) Notwithstanding s45 (2) (a) of the MPRA which provides that inspections of a property is optional, the municipal valuer must consider the availability and sufficiency of property data in association with its value, and then decide on the merits to physically inspect a property or a group of properties to verify or collect data in order to perform a credible valuation.

(e) If the Service Provider values a property by using computer assisted mass valuation/appraisal systems and techniques, the Service Provider must ensure that it has the necessary expertise and that it follows the mass valuation guidelines of the International Association for Assessing Officers (IAAO) as recognised by the South African Council for the Property Valuers Profession and that it has the necessary skills to perform and deliver such mass valuations;

(f) The Service Provider must be familiar with the statistical systems and software required to deliver mass valuations and the statistical reports necessary for measuring value consistency, value uniformity and conducting sales ratio analysis in mass valuations;

(g) The Service Provider must in determining a market value for each property determine the valuation approach or approaches (if more than one approach is required) to value each property. The common valuation approaches are (1) Direct sales comparison approach, (2) Income approach and (3) Cost approach.

(h) The Service Provider must –

(i) determine, decide and capture against each property valued, which properties are valued by CAMA and which properties are valued by NON-CAMA individual approach,

(ii) for all properties valued, provide the specified data, property data, market data, income data, cost data, market reports and valuation templates prepared as part of the general valuation and the bid specification,

(iii) when deciding to value property individually also consider the relevance of and consider the International Valuation Standards (IVSs) in the valuation approach and methods applied to determine the market value as defined in the MPRA.

(i) If the Service Provider values a property on an individual basis, a valuation template must be developed based on the property being valued and a separate valuation template completed for each property valued and submitted with the certified valuation roll and for every subsequent supplementary valuation performed.

(j) In valuing property, the Service Provider must ensure that it follows the International Valuation Standards (IVS) and mass valuation guidelines of the International Association for Assessing Officers (IAAO) as recognised by the South African Council for the Property Valuers Profession.

(k) The Service Provider must produce and deliver draft values at least two (2) months (1st December), before the delivery of the final certified valuation roll and the values must have been substantially reviewed.

(l) Valuation calculation templates, computer assisted mass appraisal CAMA techniques, CAMA models and motivations, data collection forms and information used to determine the values and prepare the valuation roll must be delivered with the final certified valuation roll, based on the applicable methodology CAMA / NON-CAMA.

(m) The Service Provider must ensure that the municipality is divided up into market areas or homogeneous areas to accommodate computer assisted mass appraisal techniques and modelling to support mass valuations.

(n) A spatial GIS layer and database of the market areas / homogeneous areas must be prepared and delivered to the municipality on delivery of the draft roll and the final roll which must be reflective of the CAMA modelling applied.

(o) The Service Provider must in terms of the MPRA Section 34 (aA), subject to section 81(1B), as part of the process towards submitting a valuation roll contemplated in paragraph (b), after appointment and until submission of the certified valuation roll, submit a monthly progress report to the municipal manager on the valuation of properties, regardless of whether properties are valued in terms of section 45(2)(a) or in terms of a combination of section 45(2)(a) and (b)

(7) Value review (quality assurance)

(a) The Service Provider must conduct a final value review to confirm or amend the market values of property in accordance with the bid specifications.

(b) The value review must be conducted by the Municipal Valuer or a designated Assistant Municipal Valuer who is sufficiently familiar with local conditions of the homogeneous areas to identify economic trends and who has experience in mass valuations and computer assisted mass appraisal CAMA techniques employed.

(c) The value estimates in relation to sample control valuations must be checked by using the market reports, aerial photography, data collection source field sheets supported by physical inspections (where necessary).

(d) In the case of property data amendments, the Data Collection Forms and data must be updated to the VRMS for system value re-generation and final value review.

(e) The value review must –

- 1) Compare the records in the new valuation roll against the current consolidated valuation roll, the valuation roll GIS cadastral layer and the current financial billing system data for any anomalies and missing records for investigation and correction. The exercise should include comparison of physical records, values, ownership and categories of property;
- 2) Identify and investigate any missing / zero data or values;
- 3) Compare the gross building extents captured on the VRMS against digitised building extents taking account of the number of storeys and identify and investigate major anomalies (where applicable);
- 4) Review values based on rates per unit of comparison to identify inconsistencies for correction;
- 5) Screening of highest and lowest values in terms of use and neighbourhood for abnormal values;
- 6) Review the new valuation roll values and categories against previously decided objections and appeal decisions to identify any anomalies.
- 7) Assess values for reasonableness by interrogating the data, draft values and final values, highlighting any anomalies and recommending corrective action and value amendments or justification for such anomalies;
- 8) Compare building areas collected against the digitised areas for major anomalies for further investigation;
- 9) Ensure that each property has been valued equitably in relation to other like properties;
- 10) Determine value uniformity by conducting sale ratio studies in terms of International Association of Assessing Officers IAAO guidelines;
- 11) Assess the category assigned to each property for reasonableness.

(f) The valuer responsible for the value review must provide an approval on a sample batch basis of property values.

(g) If the valuer responsible for the value review does not accept a value estimate, the necessary adjustments must be made to the property data or valuation models to adjust the property value in line with market indicators.

(h) The valuer responsible for the value review must select the value that can be documented as most representative of the true property value.

(i) An override of value may not be made for a property of which the value is incorrect due to a data error.

(j) When in the judgment of the valuer responsible for value review an override of a calibrated mass appraisal model is required, a notation must be recorded in the CAMA system, in the form of a unique override code that explains the value methodology.

(k) The override code must be maintained in a way that will allow a query to select, sort and print specific property data through the VRMS system.

(l) When the final value deviates by more than 10%, from the estimate provided by a current market-based valuation model, the Municipal Valuer must assess the reasonableness before adopting the value changes.

(m) The Service Provider must keep a record of value review (value review form) for audit purposes showing the review date, name of the valuer responsible for the value review, new override value and reasons for value change.

(n) The value review form of all changed values must be delivered with the final certified valuation roll.

(8) Copy right of valuation rolls and other data (s85)

(a) The Service Provider must comply with the MPRA section 85 and the bid specifications. As extracted from the MPRA - *"Copyright of valuation rolls and other documents produced by municipal valuers, assistant municipal valuers or data-collectors in the performance of their functions, and data collected by municipal valuers, assistant municipal valuers or data-collectors for the purpose of preparing valuation rolls, vests in the municipality concerned."*

(b) The Service Provider must ensure that all data, property data, information, documents and reports including CAMA models and calculations produced in terms of the MPRA are available and handed over to the municipality on request. All data, property data, information, reports, files, and documents which are prepared, collected, gathered, formulated and/or researched during a general valuation and any supplementary valuation roll records of updating, belongs to the municipality and must be officially handed over to the municipality at the time that each certified valuation roll or supplementary valuation roll is handed to the municipality.

(c) The typical data, information, reports, files, and documents which are prepared, collected, gathered, formulated and/or researched include, however are not limited to the following –

- 1) General Valuation (GV) Roll certified (Hard Copy and electronic) if in a GV year
- 2) Supplementary Valuations and rolls (Hard Copy and electronic)
- 3) Consolidated Valuation Roll (current roll) (electronic)
- 4) Valuation Roll GIS cadastral Layer (electronic)
- 5) Property data (electronic)
- 6) General Valuation Sales File and GIS sales cadastral file (electronic)
- 7) General Valuation Deeds Extract (date stamped) for ownership and sales data (electronic)
- 8) Aerial Photography (electronic)
- 9) Data Collection Training Manuals (Hard Copy and Soft copy)
- 10) Sample Data Collection Forms – main property sectors (Hard Copy and Soft copy)
- 11) General Valuation Methodology by property sector (Hard Copy and Soft Copy)
- 12) General Valuation Market reports by property sector (Hard Copy and Soft Copy)
- 13) CAMA models (formula)
- 14) Data and Information pertaining to reviews, objection reviews and appeals (Hard Copy and Soft Copy).

(d) All specified data must be collated, prepared and handed over with every valuation roll certified or as required by the municipality in spreadsheet, database or CSV format and for the GIS data in an ESRI shape file format, in accordance with the bid specifications.

(e) The Service Provider must deliver a draft valuation roll and ALL data / templates, sales data, CAMA models, valuation roll GIS cadastral layer, methodology documents, market reports, training manuals, information and the aerial photography used in the general valuation at least two months before final delivery of the certified valuation roll to allow for review by the municipality.

The structure, format and content of the valuation roll and data provision must be according to the bid specifications and templates.

(f) A draft valuation roll must be sufficiently complete to enable the municipality to undertake quality assurance and review.

(g) A draft valuation roll must be delivered with all specified electronic data and demonstrated ability to synchronise the roll data to the Municipality's financial system.

(h) The Service Provider must deliver a final valuation roll and ALL property data, the sales data, CAMA models, valuation roll GIS cadastral layer, methodology documents, market reports, training manuals, information and the aerial photography used in the general valuation to determine the values.

(i) The electronic copy of the final valuation roll in a csv, MS Excel or MS Access file format, in accordance with the specified data formats of the bid specifications, must be delivered to the Municipal Manager in a format suitable for synchronising with the Municipality's financial system MUNSOFT.

(j) The Service Provider must print and bind the final certified valuation roll in the format prescribed in terms of the MPRA and regulations as well as per requirements of the Municipality.

(k) The reporting and data extracts from the valuation roll management system (VRMS) may require customisation for standardisation from time to time as required by the municipality and the Service Provider will be required to follow and implement the customised reporting and data extracts.

(9) Quality assurance

The quality control and assurance measures must be in terms of this bid and the bid specifications.

(10) Close-out report

The Service Provider must produce a close-out report for the general valuation.

10. OBJECTIONS

(1) The Service Provider must provide support to a municipality for the public notice and inspection period in terms of section 49, and attend to the objection process and deal with objections in compliance with sections 50, 51, 52 and 53 of the MPRA, including the following –

(a) the Service Provider must prepare, print and post the notices in terms of section 49 and 53 of the MPRA;

(b) the Service Provider must record all objections in a database;

(c) the Service Provider must respond in writing to all objectors as required by the MPRA;

(d) the Service Provider must consider and decide objections and amend the valuation roll, where necessary based the Municipal Valuers decision;

(e) the Service Provider must make sales evidence in support of a decision regarding an objection available upon request by the Municipality;

(f) the Service Provider must give written reasons to the Municipal Manager for any Municipal Valuer decision where the value is adjusted by more than 10% up or down;

- (g) the Service Provider must prepare and maintain a GIS cadastral layer of objections received with decisions and changes;
 - (h) the Service Provider must notify an objector of the outcome of an objection and furnish reasons for its decision upon application by the objector;
 - (i) the Service Provider must furnish written reasons for its decision upon application by an objector;
 - (j) the Service Provider must prepare a close-out report of all objections received and processed.
- (2) The service Provider must physically inspect each property which is the subject of an objection to ensure that data is reviewed and the property is valued correctly. The inspection must include liaison with the owner for verification of data and information.
 - (3) The service provider must ensure that the valuation roll is adjusted or added to in accordance with the decisions taken by the appeal board in terms of section 69.
 - (4) The processing and dealing with objections in terms of the MPRA is deemed part of the general valuation and annual maintenance fees and therefore no separate or added fee is payable for this service. Refer to pricing schedule in Bid Quotation document.
 - (5) The Service Provider must produce an objection close-out report.

11. APPEALS

- (1) The Service Provider must assist the municipality with the resolution of appeals, including the following –
 - (a) the Service Provider must record all appeals in a database;
 - (b) the Service Provider must make sales evidence in support of a decision regarding an objection available upon request by the Valuation Appeal Board;
 - (c) The Service Provider must represent the Municipality at hearings of the Valuation Appeal Board through the Municipal Valuer or an Assistant Municipal Valuer;
 - (d) the Service provider must amend the valuation roll if the Valuation Appeal Board rules in favour of the appellant.
 - (e) the Service Provider must prepare and maintain a GIS cadastral layer of appeals received with decisions and changes; and
 - (f) the Service Provider must prepare a close-out report of all appeals received and processed.
- (2) The municipal valuer must attend to all appeals lodged and attend appeal hearings as required.
- (3) The service provider must ensure that the valuation roll is adjusted or added to in accordance with the decisions taken by the appeal board in terms of section 69.
- (4) The service Provider must review the objection data over a property that is the subject of an appeal and ensure that the property has been inspected at the objection stage to ensure that data is verified and the property is valued correctly. The review may include liaison with the owner for verification of data and information in preparation for an appeal.

- (5) The Service Provider must produce an appeal close-out report.

12. VALUATION ROLL MAINTENANCE (Updating of Rolls)

- (1) Valuation Roll Maintenance means the performance of the functions of the municipal valuer as contemplated in section 34 and the updating of rolls in terms sections 77, 78 and 79 of the MPRA, and must include:
- (i) liaison and communication with the ratepayer or Municipality on any matter omitted from or queried in the valuation roll or subsequent supplementary valuation rolls and the processing of supplementary valuations where necessary;
 - (ii) the updating of ownership and other particulars to the valuation roll and amendments of the valuation roll as contemplated in section 79 of the MPRA for the duration of the contract;
 - (iii) undertaking supplementary valuations in terms of sections 77 and 78 of the MPRA in respect of any rateable property—
 - (a) incorrectly omitted from the valuation roll;
 - (b) included in a municipality after the last general valuation;
 - (c) subdivided or consolidated after the last general valuation;
 - (d) of which the market value has substantially increased or decreased for any reason after the last general valuation;
 - (e) substantially incorrectly valued during the last general valuation;
 - (f) that must be revalued for any other exceptional reason;
 - (g) of which the category has changed; or
 - (h) the value of which was incorrectly recorded in the valuation roll as a result of a clerical or typing error.
- (2) Supplementary valuations must reflect the market value of property determined in accordance with market conditions that applied as at the date of valuation, determined by the Municipality and adopted by a Council resolution.
- (3) In terms of the MPRA section 78 (5) (a), the municipal valuer must on completion of the supplementary valuation contemplated in subsection (1) (a) to (g), and following a correction contemplated in subsection (1)(h), serve the results of the supplementary valuations or corrections contemplated in subsections (1) (g) and (h), by ordinary mail, or if appropriate, in accordance with section 115 of the Municipal Systems Act, on every owner of property who has been affected by a supplementary valuation contemplated in subsection (1)(a) to (g) and a correction contemplated in subsection (1)(h), a notice reflecting the supplementary valuation or correction of the property, as well as the particulars listed in section 48(2).
- (i) The notice referred to in paragraph (a) must inform the property owner that he or she may lodge a request for review with the municipal manager in writing, within 30 days after the posting of the notice in respect of any matter reflected in the supplementary valuation.
 - (ii) The municipal valuer may adjust the valuation on consideration of the request for review contemplated in paragraph (b).

- (iii) The service provider must manage all notifications and ensure that all correspondence and communications of supplementary valuations are archived and available on request by the municipality.
 - (iv) The service provider must on a monthly basis, forward all notifications in terms of section 78 (5) (a) and (b) of the results of the supplementary valuations and review decisions to the municipality for the rates adjustments and for audit purposes.
 - (v) The service provider, must, at least once a year, compile and publish a supplementary valuation roll of all properties on which a supplementary valuation, as contemplated in subsection (1) was made, including review decisions referred to in subsection (5)(b), and make it public and available for inspection in the manner provided for in section 49.
- (4) The Service Provider must generate, print and post all Section 78 (5) (a)/(b) and Section 49(1) notices as part of administrative support.
 - (5) The Service Provider must attend to valuation roll queries received from ratepayers or the Municipality outside the objection and appeal process and update the valuation roll where necessary by supplementary valuation.
 - (6) The Service Provider must update the valuation roll with any supplementary updates including objections and appeal decisions which includes updating the valuation Roll GIS cadastral layer where spatial changes are affected.
 - (7) The captured data must reflect the old value, the corresponding new value, the effective date of the change and indicate the reason for the change and a report of all supplementary roll updates which must include the above reflected changes must be extractable on request by the municipality.
 - (8) The Service Provider must ensure that all property data, documents, correspondence, data collection forms and review forms emanating from the preparation of a supplementary valuation roll is provided for each affected property.
 - (9) The Service Provider must prepare, produce and supply a consolidated valuation roll in a csv, MS excel or MS Access format on an annual basis OR as required by the municipality in terms of the bid specifications.
 - (10) The Service Provider must prepare, print and bind a hard copy of the certified supplementary valuation roll in the format prescribed in the MPRA and regulations and submit the certified supplementary valuation roll to the Municipal Manager within the required time frames.
 - (11) An electronic extract of the supplementary valuation roll must be delivered to the Municipal Manager in csv, MS excel or MS access or in a format suitable for synchronising with the Municipality's financial system MUNSOFT.
 - (12) The Service Provider must prepare, generate and print the Section 49(1) notices for the applicable supplementary valuation roll for the duration of the bid.
 - (13) The Service Provider must produce an annual maintenance close-out report.
 - (14) The Service Provider must attend to and dispose of all objections, appeals and reviews in terms of the MPRA at no add on cost except for the close out reports (with objection and appeal) and the attendance at valuation appeal board hearing meetings which may be charged at a fee to be negotiated between the bidder and the municipality before the bid award.

BASIS FOR FUNCTIONALITY EVALUATION

a) Resources –

- Municipal Valuer
 - Assistant Municipal Valuer
 - Other relevant resources
- b) Bidders experience
- c) General Valuation Project methodology
- d) Quality assurance plan
- e) MPRA, Mass Valuation (CAMA) and preparation of valuation rolls experience
- f) Skills transfer plan

See attached functionality evaluation schedule below.

Note: Bidders must note that a Service Level Agreement will have to be concluded with the successful bidder.

FUNCTIONALITY: A minimum score of 70 % out of 100 points must be scored in order to proceed to the Financial Evaluation.

Criteria	Sub criteria	Points
Municipal Valuer must comply with Section 39 (1) of the MPRA Registered as a professional valuer or professional associated valuer in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000 with experience as a municipal Valuer	Municipal Valuer must be registered as a professional Valuer or professional Associated valuer (with no restrictions), with a valid registration with the SACPVP. The certificate of registration will serve as an evidence Proof of registration with SACPVP = 15 points No proof of registration = 0 points Experience on completion of General Valuation (GV) Projects as Municipal Valuer in a Municipality 3 GVs and above = 15 1 to 2 GVs = 10 Less than 1 = 0 (Signed Reference OR signed Recommendation letters OR Letters of Completion of completed GV projects from clients must be attached and CV of Municipal Valuer with references)	30
Experience of Tendering Company in conducting major Valuation work	Proof of evidence from clients demonstrating major valuation work that has been conducted over the past years in terms of the MPRA. Signed Reference OR signed recommendation letters OR Letters of Completion on completed Major Valuation Projects: 3 Valuations and above = 15 1 to 2 Valuations = 10	15

	Less than 1 = 0	
Skills transfer programme	<p>A detailed plan on the skills transfer program (Coaching and mentoring of in-house staff)</p> <p>Skills transfer Plan = 5 points No Skills transfer Plan = 0 points</p>	5
Human resources capacity	<p>The Bidder must provide registered and experienced human resources and must demonstrate sufficient experience and ability in the bid project deliverables and scope of work.</p> <p>Clear HR plan and organogram which includes registered and experienced nominated person/s with relevant Certificate of qualification as recognised by SAQA and CV nominated person/s = 15 Points</p> <p>Plan Not clear and does not cover minimum personnel useful in Project Deliverables = 0 Points</p>	15
Back-up and recovery plan	<p>Provision of the specified back-up and recovery plan.</p> <p>Proof of Back-up and recovery plan = 5 points No proof of Back-up and recovery plan = 0 points</p>	5
Public Participation Plan	<p>Provision of an implementation plan for the specified public participation plan with media examples and time-frames.</p> <p>Public Participation Plan = 5 points No Public Participation Plan = 0 points</p>	5
Quality Assurance Plan	<p>Provision of a Quality Assurance Implementation Plan with project phase details and process flow</p> <p>Quality Assurance Plan = 5 points No Quality Assurance Plan = 0 points</p>	5
Insurance	<p>The Bidder must submit proof of Professional Indemnity Insurance to the amount of contract tendered</p> <p>Proof of insurance = 5 points No proof of insurance = 0 points</p>	5
Valuation Roll Management System (VRMS) Accreditation.	<p>Partnership certificate or letter from the distributor confirming supply of Valuation Roll Management System License.</p> <p>Proof of VRMS = 5 points No proof of VRMS = 0 points</p>	5
General Valuation Project plan and implementation methodology	<p>The bidder must provide a clear general valuation project plan and implementation methodology which must cover methods to be applied to different categories of properties.</p> <p>project plan and methodology which covers the Implementation Plan with project phase details and process flow of Valuation rolls = 10 Points</p> <p>No clear plan that covers methods to be applied to different categories of properties = 0 Points.</p>	10
TOTAL		100

PRICING SCHEDULE GENERAL VALUATION ROLL

A detailed project costs breakdown including other relevant costs associated with the project should be provided.

Description	2024/25 (R)	2025/26	2026/27
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General Valuation Roll			
Vacant properties			
Mixed use properties			
Business & Commercial			
Industrial Properties			
Agriculture and farming			
Agric land use for other purposes, commercial hospitality, game etc			
Property with mining purpose			
Public Service Use - Government / state owned land			
Public service Infrastructure			
Churches of places of worship			
Informal Townships			
Municipal			
Attendance of appeal board hearing			
Travelling expenses for supplementary valuation roll and appeals			
Disbursements for supplementary valuation roll and appeals			
Municipal notices to property owners			
Promulgation of municipal rates			
Supplementary Valuation roll			
Compliance Rates (Rate & Total)			
TOTAL PRICE			

Due Diligence

- For due diligence, the municipality may invite bidders who satisfy the qualifying criteria to make a presentation to the bid evaluation committee. The presentation will be in terms of the following:-
 - An evaluation of the bidder's understanding of the Local Government: Municipal Property Rates Act, No 6 of 2004,
 - An overview of the proposed work program and resources as per the bid submission to deliver a certified general valuation roll and to prepare supplementary valuation rolls for the maintenance period, including quality assurance methodology and plan;
 - An overview of the proposed work program with specific reference to the cash flow requirements to achieve key deliverables within the required time frames;
 - A brief overview of the proposed skills transfer program contained within the bid submission;
 - Understanding and identification of critical risks and vulnerabilities associated with the proposed project within the Municipality.
- The municipality may also conduct due diligence to confirm projects previously done with mentioned clients.

Bidder that fail to submit proof of specific goal as stipulated below will not be allocated points

The specific goals allocated points in terms of this tender	Number of points claimed (80/20 system) (To be completed by the organ of state)	Proof to claim points
Tender Price	80	

EME or QSE which is at least 51% who are Youth-Enterprise 18-35	4 Points	Company Registration Document and Certified ID Copy, CSD Report
EME or QSE which is at least 51% owned by Women	4 Points	Company Registration Document and Certified ID Copy, CSD Report
EME or QSE which is at least 51% Disability-Equity ownership	2 Points	Medical report
EME or QSE which is at least 51% black owned	10 Points	Company Registration Document and Certified BBBEE Certificate or Original Sworn Affidavit and CSD Report
Total (Specific Goals)	20 Points	