



## REQUEST FOR BIDS

**RFB NUMBER** : SHRA/RFB/SDT/02/202324

**CLOSING DATE** : Friday, 13<sup>th</sup> October 2023

**TIME** : 11h00

**DESCRIPTION** : Appointment of a business development consultants to support five (5) potential social housing institutions with their accreditation application

**BRIEFING:**

Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>
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## **DOCUMENTS IN THIS BID DOCUMENT PACK**

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

### **SECTION A**

1. Background
2. RFB Submission Conditions and Instructions
3. Terms of Reference
4. Evaluation Process
5. Evaluation Criteria

### **SECTION B**

1. Special Conditions of Bid and Contract
2. General Conditions of Contract (Annexure A)
3. Invitation to Quote (SBD 1)
4. Pricing Schedule (SBD 3.3)
5. Declaration of Interest (SBD 4)
6. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1)
7. Submission Checklist

## **SECTION A**

### **1. BACKGROUND**

The Social Housing Regulatory Authority ("SHRA") was established in August 2010 by the Minister of Human Settlements in terms of the Social Housing Act, No. 16 of 2008. The SHRA is listed as a Schedule 3A public entity in terms of the Public Finance Management Act.

#### **1.1 MISSION**

The SHRA will regulate and invest to deliver affordable rental homes and renew communities.

#### **1.2 VISION:**

Affordable rental homes in integrated urban environments through sustainable institutions.

#### **1.3 FUNCTIONS**

- Promote the development and awareness of social housing by providing an enabling environment for the growth and development of the social housing sector.
- Provide advice and support to the Department of Human Settlements in its development of policy for the social housing sector and facilitate national social housing programmes
- Provide best practice information and research on the status of the social housing sector
- Support provincial governments with the approval of project applications by social housing institutions
- Provide assistance, when requested, with the process of the designation of restructuring zones
- Enter into agreements with provincial governments and the National Housing Finance Corporation to ensure the co-ordinated exercise of powers

## 2. RFB SUBMISSION CONDITIONS AND INSTRUCTIONS

### 2.1 FRAUD AND CORRUPTION

2.1.1 All bidders are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

### 2.2 COMPULSORY BRIEFING SESSION

2.2.1 There will be **NO compulsory briefing session** for this Request for Bids

### 2.3 CLARIFICATIONS/QUERIES

2.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Phindile Moche** at [phindilem@shra.org.za](mailto:phindilem@shra.org.za) by **Monday 9<sup>th</sup> October 2023 at 16h00**. The **bid number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted**. If appropriate, the clarifying information will be made available to all bidders by e-mail only.

### 2.4 SUBMITTING BIDS

#### • ONE HARD COPY AND ITS SOFT COPY IN AN USB FORMAT.

Faxed or e-mailed bids will not be accepted  
Bids should be submitted in a sealed envelope, marked with:

- ☐ RFB number: SHRA/RFB/SDT/02/202324
- ☐ Closing date and time: Friday 13<sup>th</sup> October 2023 at 11h00
- ☐ The name and address of the bidder

**Documents submitted on time by bidders shall not be returned.**

### 2.5 LATE BIDS

2.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bids received late shall be returned unopened to the bidder.

Bidders are therefore strongly advised to ensure that bids be despatched allowing enough time for any unforeseen events that may delay the delivery of the bid.

2.5.2 The official Telkom time (dial 1026) will be used to verify the exact closing time (11h00)

2.5.3 Bids sent to SHRA via normal post or any other mechanism shall be deemed to be received at the date and time of arrival at the SHRA premises (tender/bid box or reception). Bids received at the physical address after the closing date and time of the bid, shall therefore be deemed to be received late.

## **2.6 DIRECTIONS TO SHRA OFFICE FOR DELIVERY OF BIDS**

**2.6.1 Bidders should allow time to access the premises due to security arrangements that need to be observed.**

## **2.7 FORMAT OF BIDS**

**2.7.1** Bidders must complete all the necessary bid documents and undertakings required in this bid document. Bidders are advised that their bid should be concise, written in plain English and simply presented.

**2.7.2** Bidders are to set out their bid in the following format:

### **Part 1: Invitation to Bid**

Bidders must complete and submit the Invitation to Bid document.

### **Part 2: Pricing Schedule**

Bidders must complete and submit the pricing schedule document.

The appointed Service Provider will:

- Claim travel costs applicable to this contract as per the AA rates
- Book only economy class flight and preferably Group A hire cars, otherwise Group B are to be used for Service Providers outside of Gauteng.
- Book only hotels, or other equivalent accommodation up to a Rand value of R1 700 per night per person (including dinner, breakfast, and parking).

**The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.**

### **Part 3: Declaration of Interest**

Each party to the bid must complete and submit the Declaration of Interest.

### **Part 4: Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022**

Bidders must complete and submit the Preference Points Claim Form.

A trust, consortium or joint venture:

- ☐ will qualify for points for their specific goals as a legal entity, provided that the entity submits their B-BBEE certificate OR a Letter from a registered Accounting Officer/ Auditor OR a sworn affidavit in terms of the Amended B-BBEE Codes from Exempted Micro Enterprises (EMEs) of R10 000 000 annual turnover.

- ☐ will qualify for points for their specific goals as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

### **Part 5: Broad Based Black Economic Empowerment Certificate**

Bidders are to submit an Original/Certified copy of a valid BBEE Certificate.

- ☐ A trust, consortium or joint venture will qualify for points for their specific goals as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid. or a letter from an Accounting Officer/ Auditor or a sworn affidavit in terms of the Amended B-BBEE Codes from Exempted Micro Enterprises (EMEs) of R10 000 000 annual turnover.

### **Part 6: General Conditions of Contract**

Bidders must initial each page of the General Conditions of Contract and submit with their bid document.

### **Part 7: Technical approach**

Bidder must at least:

Describe, in detail, exactly how they propose to carry out the activities to achieve the outcomes identified in the terms of reference. Bidders are required to have the basic office equipment and the resource/s (which must include, laptop, 3G connection, landline, own office with the basic office equipment) will be located within the region where the work will be done. They should identify any possible problems that might hinder delivery and indicate how they will avoid, or overcome such problems.

Describe how the work will be managed. Provide an organisation chart clearly indicating:

- ☐ The lines of reporting and supervision within the bidder's team.
- ☐ The lines of reporting between the bidder and SHRA.

Identify the position(s) involved in the direct delivery of the service to be provided and in the overall management of the work and name the people who will fill these positions.

Describe the tasks, duties or functions to be performed by staff in these positions.

Indicate the number of hours required to complete each task and the number of hours to be provided by each team member. The bidder must be able to work within strict timelines and have the capacity to do so.

Provide information on any additional value-added services for consideration by SHRA, and which will form part of the overall proposed

solution. Please note that the additional value ads must be priced separately in the space provided for in the pricing schedule.

Bidders are to present such information in a matrix. The following is provided merely as guidance. Bidders are free to elaborate as they see fit.

Outcome/output	Activity	Team member(s) involved (name and position)	Person days for each team member	Total person days

Provide a work plan of activities. In addition to providing details of the estimated number of workdays for each activity, bidders are to supply a detailed timetable that identifies when certain activities will be undertaken and over what period they will be spread. The timing of activities, the time needed to complete them, and the order in which they will be undertaken must be explained and justified.

## **Part 8: Team Details**

The bidder must provide:

- ☐ A comprehensive curricula vita (relevant to this bid and limited to two pages). In particular, the CV must highlight the team member(s) experience and qualifications to carry out the work

## **Part 9: Experience in this field**

It is essential the service provider displays:

- ☐ Experience as set out in the terms of reference
- ☐ The Bidder must provide at least three (3) reference letters on company letterheads of previous clients where the Bidder provided similar services.

## **Part 10: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration**

## **2.8 PRESENTATIONS**

2.8.1 SHRA reserves the right to invite Bidders for presentations before the award of this Bid. Only Bidders who have met the minimum functionality criteria will be invited to presentation.

## **2.9 NEGOTIATION**

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

2.9.2 SHRA shall not be obliged to accept the lowest of any quotation, offer or bid.

2.9.3 SHRA issues this bid invitation in good faith; however, it reserves the right to:

- ☐ Cancel or delay the selection process at any time, without explanation,
- ☐ Not to select any of the respondents to this bid invitation, without explanation,
- ☐ Exclude certain services, without explanation.

2.9.4 All bidders will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties. The designated responsible person of SHRA is the Chief Executive Officer or his/her written authorised delegate.

## **2.10 REASONS FOR REJECTION**

2.10.1 SHRA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.

2.10.2 SHRA may disregard the bid of any bidder if that bidder, or any of its directors:

2.10.2.1 have abused the Supply Chain Management systems of SHRA.

2.10.2.2 have committed proven fraud or any other improper conduct in relation to such systems.

2.10.2.3 have failed to perform on any previous contract and the proof exists.

2.10.3 Such actions shall be communicated to the National Treasury.



### 3. TERMS OF REFERENCE

#### 3.1 INTRODUCTION

3.1.1. The Social Housing Regulatory Authority (SHRA) is an entity of the National Department of Human Settlements (NDHS) and was established in terms of the provisions of section 7 of the Social Housing Act, 16 of 2008 (the Act). SHRA is a schedule 3A public entity in terms of the Public Finance Management Act, No. 1 of 1999 (PFMA).

3.1.2. Both section 11 3(a) and (b) of the Social Housing Act respectively state amongst other functions of the SHRA as... *“provide financial assistance to social housing institutions through grants to service providers accredited by the Regulatory Authority to enable them to develop institutional capacity, gain accreditation as social housing institution, and to submit viable project application”*.

*“...accredit institutions meeting accreditation criteria as social housing institutions,”*

3.1.3. In furtherance of the Act, the provision in section 3 of the Social Housing Regulations, stipulates the SHI accreditation qualifying criteria as the following:

- a. *Be constituted in the appropriate legal form...*
- b. *Have founding documents that prohibit the distribution of profits as dividends*
- c. *Conduct its affairs in compliance with the principles of good governance*
- d. *Have a business plan which illustrates financial sustainability*
- e. *Promote effective tenant management*
- f. *Promote and ensure effective property management*
- g. *Have property development plan*

3.1.4. Having pre-assessed the first accreditation applications of these potential applicants, and found gaps that suggest a need for professional support, the SHRA wishes to appoint business development or management services consultants to work with this potential applicant to undertake the following:

- SHI Accreditation Application support work
- Capacitate and ensure the transfer of skills to the team

3.1.5. The following are the five (5) emerging potential social housing with whom the appointed service provider/s will work:

#	Recipient Profile	Location	Province
1	Military Veterans owned enterprise	Port Elizabeth Gqeberha	Eastern Cape
2	Youth owned enterprise	Emfuleni	Gauteng
3	Youth owned enterprise	Mangaung	Free State
4	Black-owned	Port Shepstone	Kwa-Zulu Natal

5	Women-owned enterprise	Klerksdorp	North-West
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Bidders may submit a proposal for one or more enterprises work-packages and indicate this in their submission and pricing, however the SHRA reserves the right to allocate or split these work- packages amongst the successful bidders.

### 3.2 PURPOSE OF THE ASSIGNMENT

3.2.1. SHRA wishes to appoint business development agencies or management services consultants to work with these potential applicants in undertaking the following:

- SHI Accreditation Application support work
- Capacitate and ensure the transfer of skills to the potential applicant's management teams.

### 3.3 SCOPE AND DELIVERABLES

The following are the anticipated elements of this project scope and related deliverables:

3.1 Assessment / analysis of Current business Structure (phase 1)		
Scope	Details	Deliverables
<b>Assessment of current business and governance model, including review of the Processes, Procedures, and Systems used to run the affairs of the enterprise</b>	<b>Efficiency, Effectiveness and Compliance Analysis</b> <ul style="list-style-type: none"> <li>• Current business and governance model &amp; design (constitution etc)</li> <li>• Current Processes, Systems, and procedures around the five (5) core functional areas: Property Development, Property Management and Maintenance, Client Service Management, Financial Management, Internal Management.</li> <li>• Review, improve existing or develop new policies</li> <li>• Financial viability and sustainability</li> <li>• Business Information Systems (BIS)</li> <li>• Board and management team members' skills composition</li> <li>• Legal registration statuses</li> <li>• Annual operational plan</li> <li>• 5-year Strategic business plan</li> <li>• Maintenance plane</li> </ul>	<b>Review and develop five-year strategic business plans and annual operation plans</b>  <b>Review, Improve and or develop the following policies</b> <ol style="list-style-type: none"> <li>1. property management</li> <li>2. property development</li> <li>3. maintenance policy</li> <li>4. tenant management</li> <li>5. financial management</li> <li>6. business information systems</li> </ol>
3.2 Accreditation Application Packaging (phase 2)		
Scope	Details	Deliverables
<b>Package good governance and due diligence "Quick Scan A"(QSA) application</b>	<ul style="list-style-type: none"> <li>• Business and governance structure arrangement</li> <li>• Core Business functions:</li> <li>• Development and alignment of Business Policies and Processes and other legal documents to SH Regulations covering</li> </ul>	<b>Completed SHI Accreditation Pack in line with the SHRA accreditation criteria with supporting document.</b>

	<p>the following Policies and systems on:</p> <ul style="list-style-type: none"> <li>• Governance <ul style="list-style-type: none"> <li>➤ Internal Management Policy</li> <li>➤ Legal Compliance Policy</li> <li>➤ Fraud and anti discrimination policy and procedures</li> <li>➤ Conflict of Interest Policy</li> <li>➤ Risk Management policy</li> <li>➤ Long term strategic business plan</li> <li>➤ Financial forecast</li> <li>➤ Board Charter and Code of Conduct</li> <li>➤ Legal registration document</li> <li>➤ CVs of board members and key staff including job descriptions</li> <li>➤ Letters of appointment of directors and key staff members are in place</li> <li>➤ Mandate of the various Board Sub-committees</li> <li>➤ Ensure Founding Documents (standard CIPC documents) and the amended MOI that addresses Social Housing.</li> <li>➤ SARS Tax/Pin Clearance certificate</li> <li>➤ Signed accreditation application form</li> <li>➤ •Signed and completed qualification of Directors and Key staff</li> <li>➤ Transformation - Valid B-BBEE Certificate/ Sworn Affidavit/ ID copies</li> <li>➤ Organisational Due diligence template completion</li> <li>➤ Signed and completed Declaration of Interest form</li> </ul> </li> <li>• Property Development</li> <li>• Property Management</li> <li>• Tenant Management</li> <li>• Financial Management</li> <li>• Ensure that the applicant provides valid land availability agreement or offer to purchase (OTP) within a gazetted restructuring Zone</li> </ul>	
<b>3.5 Project Close Out (phase 3)</b>		
<b>Scope</b>	<b>Details</b>	<b>Deliverables</b>
<b>Project Close Out</b>		<b>Close out report</b>

### 3.4 SKILLS AND EXPERIENCE OF THE TEAM

- 3.4.1 Bidder / Team Leader must have a minimum of five (5) years' experience in Small medium and micro enterprise Development (detailed CV and qualification to be attached)
- 3.4.2 Bidder / Team leader has completed at least 3 similar assignments involving business development support (minimum 3 reference letters to be provided signed and dated).
- 3.4.3 Team mix deployed in this project must consist of team members with at least three (3) years' experience in the following fields (detailed CV and qualification to be attached)
  - Business Development
  - Business planning and strategy development
  - Financial modelling
  - Property Management / affordable or SH Rental/ Real estate background
  - Business compliance
  - Policy development

### 3.5 DURATION OF THE CONTRACT

- 3.5.1. The duration of the contract will be three (3) months from the start date that is, the date after the signing of a contract and the Service Level Agreement (SLA).

### 3.6 SUBMISSION REQUIREMENTS AND FORMAT OF THE PROPOSAL

The format of the proposal that the bidder submits is required to consist of and demonstrate the following: (***Please clearly label the various sections with dividers in your file submission***)

#### **Section 1**

Understanding of the required scope of work.

Methodology and approach which include workplan, deliverables, timeframes, and ideally matrixed identifying who in your team will be delivering the respective activities.

#### **Section 2**

Profile of the bidder.

Team composition, roles, and responsibilities.

Experience of the bidder's team and outputs matrix.

Experience evidence in company profile and or team brief CVs.

At least 3 signed reference letters with letterhead and contactable references confirming the service provider's successful completion of similar projects.

***A list of references will not be acceptable only signed letters.***

#### **Section 3**

Bidders are expected to provide an all-inclusive cost of this project with the following clearly indicated:

- Anticipated travel and disbursements
- Total cost of ownership on this assignment

Bidders are reminded that the SHRA will award the bid based on a bidder's total project cost and not hourly or daily rates. The bidders must ensure that the delivery of this project is within the required timeframes as stipulated in the Terms of Reference.

## 4. EVALUATION PROCESS

### 4.1 COMPLIANCE WITH MINIMUM REQUIREMENTS

4.1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions. Bids with obvious deviations from the requirements/conditions, will be eliminated from further adjudication.

### 4.2 FUNCTIONALITY, PRICE AND PREFERENCE POINTS

4.2.1 All remaining bids will be evaluated as follows:

4.2.2 The functionality calculation will be done based on the defined criteria and weighting thereof. Functionality will be scored out of a 100. If it is deemed necessary, presentations may be held with Bidders who have met the minimum functionality criteria. If presentations are held, the functionality score will be adjusted whereby 80 percent will be awarded to during the bid evaluation and 20 percent will be for presentation score. **If a bidder fails to score a minimum of 70% out of 100% for functionality, the bid will be disregarded from further consideration.**

4.2.3 The second part will then be done on the 80/20 split whereby (80) points will be awarded for price and 20 points will be awarded for specific goals.

### 4.3 ELIMINATION OF BIDS ON GROUNDS OF FUNCTIONALITY

4.3.1 Bids that score less than 70% of the 100% available for functionality will be eliminated from further consideration. Points will therefore not be awarded for their cost bids or for specific goals.

4.3.2 The percentage scored for functionality should be calculated as follows:

4.3.3 Each panel member shall award values for each individual criterion on a score sheet. The value scored for each criterion shall be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for the various criteria. These marks should be added to obtain the total score. The following formula should then be used to convert the total score to a percentage for functionality:

$$Ps = \frac{So}{Ms} \times Ap$$

where

Ps = percentage scored for functionality by bid/bid under consideration

So = total score of bid/bid under consideration

Ms = maximum possible score

Ap = percentage allocated for functionality

The percentages of each panel member shall be added together and divided by the number of panel members to establish the average percentage obtained by

each individual bidder for functionality.

After calculation of the percentage for functionality, the prices of all bids that obtained the minimum score for functionality should be taken into consideration.

#### **4.4 PRESENTATIONS**

4.4.1 SHRA may decide to have compulsory presentations made by Bidders who met the minimum functionality criteria once the functionality score has been calculated.

4.4.2 Presentations shall only affect the marks awarded for functionality. If SHRA wishes to use presentations as an additional selection criterion between bidders, the evaluation criteria to be affected shall be determined in advance and due allowance made in the mark scheme.

4.4.3 If the date of the presentation meeting is not indicated in the bid document, at least three days' notice will be given to bidders required to attend a presentation.

4.4.4 Presentations will be made to the full Evaluation Committee.

4.4.5 Points determined by the presentation will be awarded to each bidder by each member of the Evaluation Committee and then an average calculated.

#### **4.5 AWARDING OF PREFERENCES POINTS**

4.5.1 Points for specific goals will be awarded according to the table indicated in the preference points claim form(s).

#### **4.6 COMBINING PRICE AND PREFERENCE POINTS**

4.6.1 The specific goals marks for each bid will now be added to the price points for that bid.

4.6.2 The Evaluation Committee may recommend that the contract be awarded to the bidder obtaining the highest aggregate mark as determined by 4.5.1 or to a lower scoring bid based on firm, verifiable and justifiable grounds.

#### **4.7 ADJUDICATION OF BID**

4.7.1 The Adjudication Committee will consider the recommendations and make the final award. The successful bidder will usually be the service provider scoring the highest number of points or it may be a lower scoring bid based on firm, verifiable and justifiable grounds or no award at all.

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
<b>Proposed Technical Approach and Methodology the bidder:</b>	<b>Rating out of 5</b>	<b>Evaluation criteria</b>	<b>35%</b>	
Bidders understanding of the scope of work <b>(15 points)</b>	1	Scope of work is referred to but is inaccurate or no scope is included		
	2	Scope of work is simply a copy & paste as per ToR or Scope misses some elements as contained in the ToR		
	3	Reference to the full scope of work with additional relevant elements to the original scope		
	4	Reference to the full scope of work written in own words and indicates deeper understanding by bidder		
	5	Reference to the full scope of work written in own words and examples of similar type of projects the bidders has undertaken are referenced with details		
Proposed Methodology and Project Work Plan shows how proposed actions will be managed and delivered. <b>(20 points);</b>	1	Proposed Methodology does not relate or reference any element in the scope of work or there is no project Methodology included in the submission		
	2	Methodology is missing some elements in the scope of work, has timeframes and deliverables that are not aligning to the scope of work and does not include the Project Workplan of activities		
	3	Methodology that includes the full scope of work, required timeframes and deliverables		
	4	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project plan which indicates activities and timeframes that adhere to the terms of reference.		
	5	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project Workplan which indicates activities and timeframes that adhere to the terms of reference.		

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
		Project plan also includes a matrix which shows how the activities will result in specific deliverables and team embers/ resources accountable for such milestones.		
<b>Suitability of the bidder and or proposed team:</b>	<b>Rating out of 5</b>	<b>Evaluation criteria</b>	<b>65%</b>	
Bidder /Team Leader has minimum of five (5) years' experience in Small medium and micro enterprise Development (detailed CV and qualification to be attached)  <b>(30 points);</b>	1	Team leader has less than 3 years' experience in Small medium and micro enterprise Development.		
	2	Team leader has 3 – 5 years' experience in Small medium and micro enterprise Development.		
	3	The team leader has 5 – 8 years' experience to in Small medium and micro enterprise Development.		
	4	Team leader has 8 – 10 years' experience in Small Business medium and micro enterprise Development.		
	5	Team leader with 10+ years' experience in Small medium and micro–Business Development.		
Bidder / Team leader has completed at least 3 similar assignments involving business development support (minimum 3 reference letters to be provided signed and dated).  <b>(10 points);</b>	1	0 - 1 reference letter for a completed business development assignment included in the submission		
	2	2 reference letters for completed business development assignments included in the submission		
	3	3 reference letters for completed business development assignments included in the submission		
	4	4 reference letters for completed business development assignments included in the submission		
	5	5+ reference letters for completed business development assignments included in the submission.		



ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
Team mix deployed in this project must consist of team members with at least three (3) years' experience in the following fields: <ul style="list-style-type: none"> <li>• Business Development and Financial modelling</li> <li>• Business planning and strategy development</li> <li>• Property Management / affordable or SH Rental/ Real estate background</li> <li>• Policy development (detailed CV and qualification to be attached)</li> </ul> <b>(25 points);</b>	1	No proposed team for this assignment and therefore no Team Skills Matrix		
	2	Team Skills Matrix provided but doesn't align to this assignment requirements or misses any two or three of these four critical skills required for this assignment		
	3	Team Skills Matrix is provided and fits or meets all the skills required and a minimum of 3 years' experience requirement		
	4	Team Skills Matrix is provided and fits or meets all the skills required and includes at least 5 years' experience		
	5	Team Skills Matrix is provided and fits or meets all the skills required and includes evidence of 6+ years' experience in application		
<b>TOTAL POINTS</b>			<b>100%</b>	

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

The SHRA reserves the right to request presentations from shortlisted bidders who met the minimum functionality criteria.

<b>Evaluation Criterion on Price and B-BBEE</b>	
Relative competitiveness of proposed price	80
Specific goals allocation	20
<b>TOTAL FOR PRICE AND PREFERENCE</b>	<b>100</b>

**The specific goals allocation is broken down as follows.**

<b>Specific goals towards Historically Disadvantaged Individuals (HDI)</b>	<b>Preference Point system</b>
Enterprises with ownership of 51% or more by a person/s who are <b>Military Veterans</b>	2
Enterprises with ownership of 51% or more by a person/s who are <b>Women</b>	8
Enterprises with ownership of 51% or more by a person/s who are <b>Youth</b>	8
Enterprises with ownership of 51% or more by a person/s with <b>Disability</b>	2
<b>Total Points allocated to Specific Goals</b>	<b>20</b>

## **SECTION B**

### **1. SPECIAL CONDITIONS OF CONTRACT**

#### **1.1.GENERAL**

- 1.1.1. Proper bids for the services specified must be submitted.

#### **1.2.ADDITIONAL INFORMATION REQUIREMENTS**

- 1.2.1. During evaluation of the bids, additional information may be requested in writing from Bidders. Replies to such request must be submitted in writing, within five (5) working days or as otherwise indicated. Failure to comply may lead to your bid being disregarded.

#### **1.3.CONFIDENTIALITY**

- 1.3.1. The bid and all information in connection therewith shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid. Bidders shall undertake to limit the number of copies of this document.
- 1.3.2. All bidders are bound by a confidentiality agreement preventing the unauthorised disclosure of any information regarding the SHRA or of its activities to any other organisation or individual. The bidders may not disclose any information, documentation or products to other clients without written approval of the accounting authority or the delegate.

#### **1.4. INTELLECTUAL PROPERTY, INVENTIONS AND COPYRIGHT**

- 1.4.1. Copyright of all documentation relating to this contract belongs to the SHRA. The successful bidder may not disclose any information, documentation or products to other clients without the written approval of the accounting authority or the delegate.
- 1.4.2. All the intellectual property (IP) rights arising from the execution of this Agreement shall vest in SHRA and the Service provider undertakes to honour such intellectual property rights and all future rights by keeping the know-how and all published and unpublished material confidential.
- 1.4.3. In the event that the service provider would like to use information or data generated by the service, the prior written permission must be obtained from SHRA.
- 1.4.4. SHRA shall own all materials produced by the Service provider during the course of this contract, or as part of the service including without limitation, deliverables, computer programmes (source code and object code), programming aids and tools, documentation, reports, data, designs, concepts and other information whether capable of being copyrighted or not ("IP").
- 1.4.5. The Service provider assigns all IP rights in respect of all materials referred to in clause 1.4.4 to SHRA. No other document needs to be executed to give effect to this cession, assignment or transfer.

1.4.6. The Service provider hereby irrevocably cedes, assigns and transfers to SHRA, as SHRA directs, all rights, title and interest in and to all IP (which includes, but is not limited to methodologies and products) connected with or applicable to the Services.

1.4.7. The Service provider acknowledges and agrees that:

1.4.7.1. Each provision of clause 1.3 is separate, severally and separately enforceable from any other provisions of this agreement.

1.4.7.2. The invalidity or non-enforceability of any one or more provision hereof, shall not prejudice or effect the enforceability and validity of the remaining provisions of this agreement; and

1.4.7.3. This clause 1.3 shall survive termination of this agreement.

## **1.5. NON-COMPLIANCE WITH DELIVERY TERMS**

1.5.1. As soon as it becomes known to the Service provider that he will not be able to deliver the goods/services within the delivery period and/or against the bid price and/or as specified, the SHRA must be given immediate written notice to this effect. The SHRA serves the right to implement remedies as provided for in the GCC.

## **1.6. WARRANTIES**

1.6.1 The Service provider warrants that it is able to conclude this Agreement to the satisfaction of the SHRA.

1.6.2 Although the Service provider will be entitled to provide services to persons other than SHRA, the Service provider shall not without the prior written consent of SHRA, be involved in any manner whatsoever, directly or indirectly, in any business or venture which competes or conflicts with the obligations of the Service provider to provide the Services.

## **1.7. PARTIES NOT AFFECTED BY WAIVER OR BREACHES**

1.7.1 The waiver (whether express or implied) by any Party of any breach of the terms or conditions of this contract by the other Party shall not prejudice any remedy of the waiving party in respect of any continuing or other breach of the terms and conditions hereof.

1.7.2 No favour, delay, relaxation or indulgence on the part of any Party in exercising any power or right conferred on such Party in terms of this contract shall operate as a waiver of such power or right nor shall any single or partial exercise of any such power or right under this agreement.

## **1.8. RETENTION**

1.8.1. On termination of this agreement, the Service provider shall on demand hand over all documentation, information, software, etc., relating to the

provision of services as per this bid without the right of retention, to the SHRA.

- 1.8.2. No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force and effect unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing, shall

## **2. GENERAL CONDITIONS OF CONTRACT**

- 2.1 The General Conditions of Contract must be accepted. The general conditions applicable to government entity bids, contracts and order are attached herein as **Annexure A** as they will apply to this bidding process.
- 2.2 Bidders are required to initial each page of the General Conditions of Contract as an indication of acceptance.

## INVITATION TO SUBMIT BIDS

**YOU ARE HEREBY INVITED TO PROPOSE FOR REQUIREMENTS OF THE SHRA**

**RFB NUMBER:** SHRA/RFB/SDT/02/202324 **DATE:** 13<sup>th</sup> October 2023 **CLOSING TIME:** 11h00

**DESCRIPTION:** Appointment of business development consultants to support five (5) potential Social Housing Institutions with their accreditation application

**VALITY PERIOD:** Offer to be valid for 90 days from the closing date of the bid

**The successful bidder will be required to fill in and sign a written Contract Form.**

**BID DOCUMENT MUST BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

Ms Phindile Moche  
Supply Chain Management  
SHRA  
Sunnyside Office Park  
Sentinel House  
3<sup>rd</sup> Floor  
32 Princess of Wales Terrace  
Parktown  
Faxed or e-mailed bids will not be accepted.

**Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.**

**Bids can be delivered between 08h30 and 16h30, Mondays to Friday, prior to the closing date and between 08h30 and 11h00 on the closing date.**

**All bids must be submitted on the official forms (not to be re-typed).**

**This RFB is subject to the following:**

- ☐ General Conditions of Contract (GCC) and, if applicable, any other Special Conditions of Contract.
- ☐ the Preferential Procurement Policy Framework Act, 2000
- ☐ the Preferential Policy Regulations, 2022
- ☐ **Bids submitted that do not comply with the following will be disqualified**
  - A late Bid (a bid arriving one second after 11h00 or any time thereafter)

## PART A INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>					
BID NUMBER:	SHRA/RFB/SDT/02/202324	CLOSING DATE:	13 <sup>th</sup> October 2023	CLOSING TIME:	11h00
DESCRIPTION	Appointment of business development consultants to support five (5) potential Social Housing Institutions with their accreditation application				
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
SHRA, Sunnyside Office Park, Sentinel House, 3 <sup>rd</sup> Floor, 32 Princess of Wales Terrace, Parktown					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Ms Phindile Moche		CONTACT PERSON	Ms Phindile Moche	
TELEPHONE NUMBER			TELEPHONE NUMBER		
E-MAIL ADDRESS	phindilem@shra.org.za		E-MAIL ADDRESS	phindilem@shra.org.za	
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
NAME OF REPRESENTATIVE					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3 ]
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?					<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?					<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?					<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?					<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?					<input type="checkbox"/> YES <input type="checkbox"/> NO
<b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b>					

**TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

**TOTAL BID PRICE (ALL INCLUSIVE) .....**

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

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

**DATE: .....**



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

NAME OF BIDDER: .....	BID NO.: SHRA/RFB/SDT/02/202324
CLOSING TIME 11:00	CLOSING DATE: 13 <sup>th</sup> October 2023

OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION **(ALL APPLICABLE TAXES INCLUDED)	BID PRICE IN RSA CURRENCY
---------	--	---------------------------

1. The accompanying information must be used for the formulation of proposals.
- 2 Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project, (including VAT and all disbursements).  
R.....

PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
	-----	R-----	-----
	-----	R-----	-----
	-----	R-----	-----
	-----	R-----	-----

5.	PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT		
	-----	R-----	-----days
	-----	R-----	----- days
	-----	R-----	----- days
	-----	R-----	----- days

- 5.1 Travel expenses (specify, for example rate/km and total km, class of air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....

TOTAL: .....

\*\*"all applicable taxes" includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

- 5.2 Other expenses, for example accommodation (specify, e.g. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....

TOTAL: R.....

6. Period required for commencement with project after Acceptance of bid .....
7. Estimated man-days for completion of project .....
8. Are the rates quoted firm for the full period of contract? \*YES/NO
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index. ....

.....

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

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

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

### 2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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

- 2.2.1 If so, furnish particulars:

.....  
 .....

- 2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

**YES/NO**

- 2.3.1 If so, furnish particulars:

.....  
 .....

---

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

### 3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN

TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON

PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT

SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

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

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

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

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

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

### 1. GENERAL CONDITIONS

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

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

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

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

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

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

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
<b>TOTAL POINTS FOR PRICE AND SPECIFIC GOALS</b>	<b>100</b>

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

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

### 2. DEFINITIONS

**“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

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

### 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

#### 3.1. POINTS AWARDED FOR PRICE

##### 3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

**80/20**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

**80/20**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

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

***Note to tenderers: The tenderer must indicate how they claim points for each preference point system and provide supporting evidence.***

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprises with ownership of 51% or more by a person/s who are <b>Military Veterans</b>	2	
Enterprises with ownership of 51% or more by a person/s who are <b>Women</b>	8	
Enterprises with ownership of 51% or more by a person/s who are <b>Youth</b>	8	
Enterprises with ownership of 51% or more by a person/s with <b>Disability</b>	2	
<b>Total Points allocated to Specific Goals</b>	<b>20</b>	

#### DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;



- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

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

NO.	DETAILS	TICK BY BIDDER
1.	Part 1: Completed and signed the invitation to bid document (SBD 1)	
2.	Part 2: Completed the pricing schedule (SBD 3.3)	
3.	Part 3: Completed and signed the declaration of interest document. (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid <u>must</u> complete and sign the declaration of interest document)</i>	
4.	Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)	
5.	Part 5: Submitted an original/ certified copy of a valid BBEE Certificate. <i>(In case of a trust, consortium or joint venture, bidders will qualify for points for their specific goals as an unincorporated entity, provided that the entity <u>submits their consolidated B-BBEE scorecard</u> as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.</i>	
6.	Part 6: Submitted the General Conditions of Contract (initialled each page)	
7.	Part 7: Submitted the Technical approach	
8.	Part 8: Submitted the Details of the team and included their CV	
9.	Part 9: Submitted Experience in the field document and 3 reference letters	
10.	Part 10: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration.	
11.	CIPC Document	