

**REQUEST FOR QUOTATION (RFQ) TO APPOINT A SERVICE PROVIDER TO
FACILITATE A STRATEGIC PLANNING WORKSHOP FOR IZIKO MUSEUMS**

REQUEST FOR QUOTATION (RFQ) – FACILITATION OF A STRATEGIC PLANNING WORKSHOP FOR IZIKO MUSEUMS	IZIKO – OFFICE OF CEO – STRATEGIC PLANNING FACILITATOR - 08/25
Reference Number	CEO/08/2025
Description	REQUEST FOR QUOTATION (RFQ) TO APPOINT A SERVICE PROVIDER TO FACILITATE A STRATEGIC PLANNING WORKSHOP WITH MANAGEMENT AND THE NEWLY INDUCTED IZIKO COUNCIL ON IZIKO'S STRATEGIC PLAN (2025–2030) AND ANNUAL PERFORMANCE PLAN (2025/26).
Address	Iziko South African Museum 25 Queen Victoria Street Cape Town 8001
Attention	Ms F Johadien
Site	Iziko Museums of South Africa
Issue Date	1 September 2025
Closing date and time for submission	8 September 2025, 11H00
Method of delivery	Quotations, Compliance Documentation, Proposals and accompanying documentation, must be emailed to scm@iziko.org.za , ndonson@iziko.org.za & smadlavu@iziko.org.za
Name of Company	
CSD Supplier Number (MA.....Number)	
B-BBEE Status Level of Contribution	
Quote Price (Incl. Vat)	
Signature of Bidder's authorised representative	

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: BID NO.:

CLOSING TIME 12:00

CLOSING DATE.....

OFFER TO BE VALID FORDAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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- The accompanying information must be used for the formulation of proposals.
- 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.
- Bidders are required to complete the pricing/ costing schedule in **Annexure B**.
- PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

PERSON AND POSITION	HOURLY RATE	DAILY RATE

- 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
.....	R..... days
.....	R..... days

6.1 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
	R		R
	R		R
	R		R
	R		R
TOTAL	R		R

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

6.2 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
	R		R
	R		R
TOTAL	R		R

Period required for commencement with project after acceptance of bid

6. Estimated man-days for completion of project

7. Are the rates quoted firm for the full period of contract? *YES/NO

8. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

.....

.....

*

[DELETE IF NOT APPLICABLE]

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....

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

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

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

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

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

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

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
 - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 1.2 **To be completed by the organ of state**
The applicable preference point system for this tender is the 80/20 preference point system.
- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
 - (b) Specific Goals.
- 1.4 **To be completed by the organ of state:**
The maximum points for this tender are allocated as follows:
- | | POINTS |
|--|------------|
| PRICE | 80 |
| SPECIFIC GOALS | 20 |
| Total points for Price and SPECIFIC GOALS | 100 |
- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) “the Act” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$

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 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$

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

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

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

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

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

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

The specific goals allocated points in terms of this tender	Evidence	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of race	<ul style="list-style-type: none"> • Proof of B-BBEE certificate and/or; • Company Registration Certification and/or • Copies of Shareholders IDs 		
Race: Black persons (ownership)* 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points			

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:

.....

.....

.....

Appointment of a Service provider to facilitate a Strategic Planning Workshop with Management and the newly inducted Iziko Council on Iziko's Strategic Plan (2025-2030) and the Annual Performance Plan

PURPOSE AND BACKGROUND

1. PURPOSE

Iziko seeks to engage a professional facilitator (individual or team) to guide a strategic planning workshop with its new Council and senior management team on 23 and 24 October 2026.

The goal is to produce a clear agenda, facilitate effective engagement, and ensure actionable outputs feeding directly into the development of Iziko's forthcoming Annual Performance Plan.

2. BACKGROUND

Iziko Museums of South Africa (Iziko) is a Schedule 3A Public Entity and an agency of the national Department of Sport Arts and Culture (DSAC), bringing together the national museums of the Western Cape under a single governance and leadership structure. Iziko Museums of South Africa is a declared national heritage institution established as a flagship museum bringing together 12 museums under a single governance and leadership structure. Iziko is governed by a Council appointed by the Minister of Sport Arts and Culture.

3. Objectives

- Enable a focused, inclusive and productive workshop that aligns on strategic priorities.
- Deliver actionable outcomes that support and inform the draft Annual Performance Plan (APP).
- Provide tailored recommendations to support CEO and Council decision-making.

4. Scope of Work & Key Deliverables

The facilitator will be responsible for:

A. Pre-Workshop

1. Conduct preparatory consultations with relevant stakeholders (e.g., CEO, Council Chair, senior management) to understand objectives, context, and strategic issues.
2. Develop a full strategic planning workshop agenda that balances structure with flexibility for emergent priorities (e.g., SWOT inputs, strategic deep dives).
3. Present to Iziko a detailed facilitation process plan outlining methodologies for engagement, consensus-building, record-keeping, and decision capture.

B. Workshop Facilitation

4. Lead and manage the workshop throughout its full duration, ensuring inclusive and constructive participation.
5. Guide participants through structured discussions to surface, explore, and align on key strategic issues relevant to Iziko's Council.
6. Maintain focus and momentum, summarising agreements, recognising divergences, and gently steering the session forward.
7. Capture accurate proceedings— through note-taking and/or audio capture—and liaise with secretariat for follow-up documentation.

C. Post-Workshop Deliverables

8. Produce a polished workshop report (Microsoft Word), in both electronic and hard copy formats, summarizing:
 - Session proceedings
 - Key decisions, insights, and recommendations
 - A strategic programme of action with timelines, responsibilities, and alignment to the APP drafting process

9. Provide clear recommendations for both the CEO and Council—based on workshop outputs—to support informed decision-making and APP approval.
10. Ensure outputs are clearly articulated in English and structured to support the APP drafting process by management.

5. Proposed Structure & Timeline

- Inception Phase: Preparatory meetings and agenda/process as soon as possible and Iziko will advise once procurement finalised estimated to be done in September 2025.
- Workshop Delivery: On-site facilitation for 2 days at a venue to be advised.
- Reporting: Submission of draft report within 5 working days post-workshop; final report with refinements within 10 working days thereafter.

6. Required Qualifications & Competencies

- Demonstrated experience in strategic planning facilitation, preferably in public or cultural institutions.
- Strong skills in process design, consensus-building, and managing complex group dynamics.
- Excellent English communication—both facilitation and written reporting.
- Ability to remain neutral, cultivate participation, and translate workshops into strategic outputs
- Familiarity with South African public-sector planning (e.g., performance plans) would be advantageous.

7. Consortiums/Joint ventures

Service Providers may assume any number of forms including (but not restricted to) a consortium/joint venture that draws on multiple disciplines, practices and experiences.

Each party to a consortium/joint venture must comply with the requirements of this request to quote.

It is also strongly recommended that in selecting their partners, consortia consider “smaller” but capable organisations which, while strengthening the proposal, will also receive some developmental benefit from partnering with larger organisations. In the event the selected proposal is a consortium/joint venture, the contract will be signed with the lead organisation, which must be identified in the proposal.

- "Tenderers are expected to clearly outline their plans for subcontracting arrangements, including the qualifications and experience of any proposed subcontractors."
- "Joint venture partnerships are permitted, and tenderers are required to provide a copy of the joint venture agreement, or a draft of it."
- "The tenderer must demonstrate their experience in managing joint venture partnerships and outline the structure of the proposed joint venture."
- "Subcontractor requirements must be clearly stated, including the scope of work to be subcontracted and the qualifications of the subcontractors."

8. Duration

The successful bidder will be expected to be available for commencing the project from the date of signing of the agreement by the last party.

9. Risk Assessment and Due Diligence

To ensure a comprehensive evaluation of all potential risks arising from the appointment of any bidder, Iziko may seek external assistance to provide assurance that the appropriate bid is selected. Iziko also reserves the right to conduct a thorough due diligence review on any relevant aspects of a bidder's proposal to confirm compliance with all required standards and mitigate any potential risks.

10. Bidding Stages

The Service Provider must comply with Iziko's Supply Chain Management policies and procedures by submitting the required documents.

The bidding requirements and stages are summarised in the table below:

Table 1: Bidding requirements and stages

Stage 1- Administrative Documents	Stage 2 - Functionality Criteria	Stage 3 - Price and Specific Goals
Bidders must submit all documents as outlined in Table 2: Administrative Documents . Note: Failure to supply any of the administrative documents stipulated below may lead to disqualification Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete administrative documents	Bidders are required to achieve a minimum of 70% on functionality criteria to proceed to the next stage Refer Table 3 – Required documents to enable functionality scoring. Note: Failure to supply any of the administrative documents stipulated below may lead to disqualification Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete documents	Bidders that meet the minimum threshold for functionality will be evaluated based on Price & Preferential Procurement Specific Goals Evaluation Criteria as indicated in Table 4: Price – 80 points Specific Goals– 20 points

Table 2: Administrative Returnable Documents

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid to be rejected.

Order	Documents required
1.	Central Supplier Database Report– with supplier number and company details (www.csd.gov.za) and Tax Status Verification Pin together with tax registration number CSD Provided should not be older than date of RFQ advertisement
2.	Completed SBD 3.3 - Pricing Schedule and Completed Annexure A Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement and escalations, if applicable, etc. for the entire duration of the proposed contract must be provided
3.	Completed SBD 4 – Bidder's Disclosure
4.	Completed SBD 6.1 - Preference Points Claim Form (Preferential Procurement Regulations 2022)
5.	Signed Request for Quotation Document – refer to page 1 above

Table 3: Documentation for Functionality Scoring

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid to be rejected.

No.	In order to score the bid for functionality, the proposal should include the following:
1	At least three (preferably 5) reference letters for similar engagements
2	A brief methodology, including process design and anticipated tools/techniques.
3	CVs or profiles of facilitator

11. Preference Points Claim

In terms of Regulation 4 of the Preferential Regulations pertaining to the Preferential Procurement Policy Framework Act 2000 (Act 5 of 2000) Preferential Procurement Regulations, 2022 responsive bids will be adjudicated by the state on the 80/20 preference point for Specific goals in terms of which points are awarded to the bidders on the basis of price and specific goals, as follows:

Table 4: Price and Specific Goals

Preference Point Criteria	Points Allocation
---------------------------	-------------------

Price	80
Specific Goals A Valid B-BBEE certificate or Sworn Affidavit; Company Registration Certification Identification Documentation of shareholders. Latest CSD report Ownership by HDIs (Who had no franchise on national elections before the 1983 and 1993 constitution) 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points	20
TOTAL POINTS	100

12. Functionality

Proposals must score an overall minimum of 70% (70 points) for functionality criteria to qualify for further evaluation for preference points.

Functionality Criteria		Points Allocation	Value
1.	Relevant Experience	40	
2.	Facilitation Methodology and Approach	30	
3.	Qualifications & Professional Accreditation of the Facilitator	30	
Sub Total		100	
Minimum Stipulated Threshold to be met		70 points (70%)	

DETAILED FUNCTIONALITY EVALUATION CRITERIA			
No.	Evaluation Area	Evaluation Criteria	Points
1	Relevant Experience Reference letters from clients (not older than 5 years) demonstrating experience in facilitating Strategic Planning Workshops preferably in the public sector or cultural sector.	Reference letters for completed projects . Number of Letters: <ul style="list-style-type: none"> 5 or more reference letters = (40 points) detailing successful strategic planning facilitation. 4 reference letters = (30 points) 3 or fewer reference letters = (10 points). No reference letters provided, or reference letters more than 5 years old = (0 points) 	40
2	Facilitation Methodology and Approach A methodology that provides clarity and structure of the facilitation process, adaptable to Iziko's specific context and needs	<ul style="list-style-type: none"> Detailed methodology, clarifying the structure of the facilitation process, adaptable to Iziko's specific context and needs, including a draft agenda outline aligned with stated objectives = (30 points) Basic methodology with insufficient detail or alignment with institutions strategic objectives = (10 points) No methodology provided = (0 points) 	30
3	Qualifications & Professional Accreditation of the Facilitator Provide Profile or CV and certificates detailing the facilitator's educational background, qualifications, and relevant training.	Profile or CV and certificates which include: 1. certification such as Strategic Planning Professional (SPP) or Strategic Management Professional (SMP)	30

		2. formal training in strategic planning methodologies. 3. demonstrated expertise in organisational development and change management. <ul style="list-style-type: none"> CV and certificates which indicates all three of the elements above = (30 points) CV and certificates which indicates two of the elements above = (20 points) CV indicating fewer than two of the elements above = (5 points) No CV and/or No certificates = (0 points) 	
	Total Score		100

Note: Only proposals meeting the Minimum Stipulated Threshold of 70% of the Functionality Evaluation will be considered for further evaluation for 80/20 Preference Points

13. Price

Price is an important factor as it ensures optimum value for money and Total Cost to Iziko and should take into account the full duration of the contracting period.

Please complete SBD 3.3 and Annexure A below. A cost schedule detailing hourly rates, inclusive of VAT, any disbursements and escalations, if applicable, etc. for the entire duration of the proposed contract may also be provided.

14. Validity Period

Offer to be valid for 90 working days from the bid closing date.

15. Formal Contract

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

16. Reasons for disqualification

Iziko reserves the right to disqualify any submission in the event of any one or more of the following:

- The Bidder submitted their proposal late;
- The Bidder did not submit proof of CSD registration
- The Bidder did not submit complete documentation or fails to provide the documentation /information within the requested timeframes
- The Bidder submits information that is fraudulent, factually untrue or inaccurate;
- The Bid did not meet the required minimum stipulated threshold points.

17. SUMMARY OF GENERAL PRINCIPLES

- Iziko will apply the 80/20 preferential points system.
- Iziko applies the provisions of the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and the Public Finance Management Act, 1999 (Act No. 1 of 1999).
- The lowest or only proposal received will not necessarily be accepted.
- Iziko reserves the right to withdraw its decision to seek the provision of these services at any time.
- Iziko reserves the right to appoint consultants to assist with technical and risk assessments of bids.
- Iziko reserves the right to obtain clarification from a bidder on any matter that could give rise to ambiguity in a contract arising from the bid proposal
- Iziko reserves the right to request and accept changes to a proposal from a successful bidder at any time, as long as it complies with legal and administrative requirements

- Iziko reserves the right to request the administrative returnable documents after the closing date and time in instances where the Bidder has not returned the documents. However, Iziko is under no obligation to request such documents or information and may elect to disqualify the Bidder that has not returned the requisite document.
- There will be no discussions with any bidder until a final decision has been taken by the Bid Adjudication Committee. Any subsequent discussions shall be at the discretion of Iziko.

18. Delivery Approach

The successful applicant shall commence with business on a date agreed to by both parties.

19. Submission of Bids

Closing date and time: Refer to page 1 above.

The submission should be in the form of an electronic version of all documentation in the proposal.

Facsimiles, and late bids will not be accepted.

Interested Bidders are expected to submit returnable documents on the original Request to Quote document issued by Iziko and completed in black ink.

WRITTEN OR TELEPHONIC QUERIES MUST BE DIRECTED TO:

Ronell Pedro
Chief Financial Officer
Iziko Museums of South Africa
Switchboard: +27 21 481 3800
Direct Line; +27 21 468 3807
E-Mail: rpedro@iziko.org.za



Signature: _____
Ms. Ronell Pedro
Chief Financial Officer

ANNEXURE A: PRICING SCHEDULE

A detailed and Comprehensive Pricing Schedule must be submitted, using the table below as a guideline

1. Clearly indicate rates for each element of the service, specifying the applicable unit
2. The number of hours required will be determined by the volume of work.
3. The pricing structure must be inclusive of VAT
4. Any disbursements and escalations must be indicated separately.

Deliverable	Rate per Hour	Total Hours (Total Cost (R)
A. Pre-Workshop			
1. Conduct preparatory consultations with relevant stakeholders (e.g., CEO, Council Chair, senior management) to understand objectives, context, and strategic issues.			
2. Develop a full strategic planning workshop agenda that balances structure with flexibility for emergent priorities (e.g., SWOT inputs, strategic deep dives).			
3. Present to Iziko a detailed facilitation process plan outlining methodologies for engagement, consensus-building, record-keeping, and decision capture.			
B. Workshop Facilitation			
4. Lead and manage the workshop throughout its full duration, ensuring inclusive and constructive participation.			
5. Guide participants through structured discussions to surface, explore, and align on key strategic issues relevant to Iziko's Council.			
6. Maintain focus and momentum, summarising agreements, recognising divergences, and gently steering the session forward.			
7. Capture accurate proceedings—either through note-taking or audio capture—and liaise with secretariat for follow-up documentation.			
C. Post-Workshop Deliverables			
8. Produce a polished workshop report (Microsoft Word), in both electronic and hard copy formats, summarizing:			
• Session proceedings			
• Key decisions, insights, and recommendations			
• A strategic programme of action with timelines, responsibilities,			

and alignment to the APP drafting process			
9. Provide clear recommendations for both the CEO and Council—based on workshop outputs—to support informed decision-making and APP approval.			
10. Ensure outputs are clearly articulated in English and structured to support the APP drafting process by management.			
Total Excl Vat			
Vat @15%			
Total Incl Vat			