

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE INGONYAMA TRUST BOARD

BID NUMBER:	ITB/04/08/2026	CLOSING DATE:	31/08/2026	CLOSING TIME:	10h00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE RISK MANAGEMENT TRAINING FOR RISK CHAMPIONS AND MANAGERS				

BID RESPONSE MUST BE EMAILED TO

thabiso.khenisa@ingonyamatrust.org.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO

CONTACT PERSON	Ms. T Khenisa
TELEPHONE NUMBER	033 846 9900
FACSIMILE NUMBER	
E-MAIL ADDRESS	thabiso.khenisa@ingonyamatrust.org.za

TECHNICAL ENQUIRIES MAY BE DIRECTED TO:

CONTACT PERSON	Ms. N Chonco
TELEPHONE NUMBER	033 846 9910/9900
FACSIMILE NUMBER	
E-MAIL ADDRESS	Nokubonga.chonco@ingonyamatrust.org.za

SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ Yes ☐ No	

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO
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.	

PART B**TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
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 PIN 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.

SIGNATURE OF BIDDER:

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

DATE:

PRICING SCHEDULE

NAME OF BIDDER:

BID NO.: ITB/03/08/2026

CLOSING DATE: 31/08/2026

CLOSING TIME: 10H00 AM

OFFER TO BE VALID FOR **30 DAYS** FROM THE CLOSING DATE OF BID.**DESCRIPTION & PRICE DETAILS OF SERVICE REQUIRED**

DELEGATES	DESCRIPTION	TOTAL
06	APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE RISK MANAGEMENT TRAINING FOR RISK CHAMPIONS AND MANAGERS	
SUB-TOTAL		
(IF A VAT VENDOR PROVIDE PROOF OF VAT REGISTRATION) @ 15%		
TOTAL		

Amount in words. _____

I (full name) _____, in my capacity as _____
 _____, the duly authorized representative of
 _____ (business name) hereby
 declares that the offer is in accordance with the attached specification, notes to suppliers & accepts all conditions/clauses
 contained in the said documents.

Signature of duly authorised representative

Date:

NB: failure to sign this price page will invalidate the bid/quote.

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:

.....

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**

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.

2.3.1 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.
3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM

INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM

SHOULD THIS DECLARATION PROVE TO BE FALSE.

..... Signature	 Date
..... Position	 Name of bid der

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.

6.1

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.

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 regarding 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	
$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$	or	$P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$	

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{min} = Price of lowest 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.)

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)
Company within KwaZulu-Natal	20	

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole 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:	
	



INGONYAMA TRUST BOARD

• 65 Trelawney Road, Southgate, Pietermaritzburg, 3201 • P.O. Box 601, Pietermaritzburg, 3200
• Tel: 033 846 9900 • Fax: 033 386 2528 • www.ingonyamatrust.org.za

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE RISK MANAGEMENT TRAINING FOR RISK CHAMPIONS AND MANAGERS

1. PURPOSE

Appointment of a suitably qualified and experienced Service Provider to provide Risk Management Training to Risk Champions and Managers of Ingonyama Trust.

2. BACKGROUND

2.1 The Public Finance Management Act, 1999 (Act No. 1 of 1999) (PFMA) places responsibility on Accounting Officers and management to establish and maintain effective, efficient, and transparent systems of risk management and internal control.

2.2 To strengthen institutional risk management maturity and improve governance practices, Corporate Services - HR seeks to appoint a qualified training service provider to facilitate training for Risk Champions and Managers responsible for implementing and monitoring risk management within the organisation.

2.3 The training must support the Ingonyama Trust's risk management framework and strengthen compliance with:

2.3.1 Public Finance Management Act (PFMA)

2.3.2 Treasury Regulations

2.3.3 National Treasury Public Sector Risk Management Framework

2.3.4 King IV Report on Corporate Governance

2.3.5 Internal Audit Framework

2.3.6 Committee of Sponsoring Organizations (COSO) Enterprise Risk Management Principles

2.3.7 Relevant governance and compliance requirements applicable to public entities

3. OBJECTIVE OF THE TRAINING

The purpose of this procurement is to appoint a Service Provider to provide training that will enable Risk Champions and Managers to:

3.1 Understand public sector risk management requirements.

3.2 Strengthen risk identification, assessment, mitigation and monitoring capabilities.

- 3.3 Integrate risk management into strategic and operational planning.
- 3.4 Improve reporting and monitoring of risks.
- 3.5 Enhance accountability and governance.
- 3.6 Strengthen compliance with PFMA and National Treasury requirements.
- 3.7 Support the achievement of organisational objectives through proactive risk management.

4. SCOPE OF WORK

The appointed Service Provider shall provide comprehensive risk management training to Risk Champions and Managers.

The training shall cover, but not be limited to, the following:

4.1 Governance and Legislative Framework

Training must address:

4.2 Fundamentals of Risk Management

4.3 Risk Identification

4.4 Risk Assessment and Analysis

4.5 Risk Response and Mitigation

4.6 Risk Registers and Reporting

4.7 Roles and Responsibilities of Risk Champions

5. TARGET GROUP

The training shall be provided to:

5.1 Risk Champions

5.2 Senior Managers

5.3 Middle Managers

5.4 Programme Managers

5.5 Business Unit Managers

5.6 Officials with risk management responsibilities

Estimated number of participants: 6

6. TRAINING METHODOLOGY

The Service Provider shall:

6.1 Apply adult learning principles.

6.2 Include practical public-sector case studies.

6.3 Facilitate interactive workshops.

6.4 Include group exercises and simulations.

6.5 Conduct pre- and post-training assessments.

6.6 Provide training materials in electronic and printed formats where required.

6.7 Training may be delivered through:

- 6.7.1 Face-to-face or
- 6.7.2 Virtual training;

7. DELIVERABLES

The Service Provider shall provide:

7.1 Pre-Training Deliverables

- 7.1.1 Training implementation plan.
- 7.1.2 Detailed course outline.
- 7.1.3 Facilitator profiles and CVs.
- 7.1.4 Training materials and learner manuals.
- 7.1.5 Assessment tools.

7.2 During Training

- 7.2.1 Facilitation of all sessions.
- 7.2.2 Attendance registers.
- 7.2.3 Participant support.
- 7.2.4 Administration of assessments.

7.3 Post-Training Deliverables

- 7.3.1 Training completion report.
- 7.3.2 Attendance records.
- 7.3.3 Assessment results.
- 7.3.4 Participant evaluation summaries.
- 7.3.5 Recommendations for strengthening risk management practices.
- 7.3.6 Certificates of attendance and/or competence.

8. TRAINING PERIOD

The training shall be undertaken for a period of 2 to 5 days.

9. TECHNICAL REQUIREMENTS

The bidder must demonstrate:

- Minimum five (5) years' experience providing risk management training.
- Experience within South African government departments, municipalities, public entities or state-owned institutions.
- Experience in PFMA-related governance and risk management training.
- A minimum of three (3) contactable reference letters for similar projects completed within the last five years.

10. FACILITATOR REQUIREMENTS

Lead Facilitator must possess:

10.1 Qualifications

10.1.1 Degree or National Diploma in:

- Risk Management;
- Auditing;
- Accounting;
- Governance;
- Public Administration; or
- Related field.

10.2 Professional Registration

Preference will be given to facilitators holding:

- 10.2.1 Certified Risk Management Professional designations;
- IRMSA (Institute of Risk Management South Africa) professional membership;
- IIA membership;
- Certified Internal Auditor (CIA);
- CRMA (Certification in Risk Management Assurance); or
- Equivalent professional designation.

10.2 Experience

- Minimum five (5) years' experience facilitating risk management training.
- Demonstrated experience in PFMA and public sector governance.
- Experience facilitating risk workshops in government institutions.

11. REPORTING REQUIREMENTS

The Service Provider shall submit a final report including:

- Number of officials trained.
- Attendance records.
- Assessment outcomes.
- Evaluation results.
- Identified risk management capability gaps.

Recommendations to improve organisational risk maturity