

## **REQUEST FOR QUOTATIONS**

**Date of Request: 09 June 2026**

**Project Code: 96783**

**Request: To provide once-off public and corporate sectors legal, governance (including financial), and risk advice to the SAMRC to fulfill the conditions stipulated by the Minister of Health for the establishment of a fundraising foundation by the SAMRC**

**RFP Number: 00100220487OR**

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Please note we would like a proposal and quote as per the attached specification sheet.

**Contact: Supply Chain Management**

**scm@mrc.ac.za**



## REQUEST FOR QUOTATIONS

# **SERVICE PROVIDER TO PROVIDE ONCE-OFF PUBLIC AND CORPORATE SECTOR LEGAL, GOVERNANCE (INCLUDING FINANCIAL) AND RISK ADVICE TO THE SAMRC TO FULFILL THE CONDITIONS PRECEDENT STIPULATED BY THE MINISTER OF HEALTH FOR THE ESTABLISHMENT OF A FUND-RAISING FOUNDATION BY THE SAMRC**

### **Introduction**

The South African Medical Research Council (SAMRC) plays a critical role in building, supporting and participating in the national health research and innovation (R&I) ecosystem. Although its reach and impact are extensive, funding constraints limit its ability to continue to expand the organization's support for and participation in existing and new R&I initiatives. The SAMRC proposes to establish an SAMRC Foundation that will serve as an endowment/funding source to support existing and new research areas, initiatives and capacity development in the national health research and innovation arena. The Foundation will independently pursue its objective that will complement, extend and expand the mission and impact of the SAMRC. Prior to establishment of the Foundation, SAMRC intends to appoint a suitably qualified service provider to assist in fulfilling the conditions precedent imposed by the Minister of Health in respect of the approval for the establishment of a stand-alone foundation. The SAMRC seeks to ensure that all legislative and financial implications are taken into account and to select an appropriate structure and governance model for the foundation.

### **Scope of work**

A service provider is required to assist the SAMRC to meet the conditions stipulated by the Minister of Health for the establishment of a fundraising foundation by conducting the following scope of work:

The service provider must:

- Conduct a legal assessment to determine whether the proposed establishment of an independent fundraising support structure is permissible within the

mandate conferred by the SAMRC's enabling legislation and does not give rise to *ultra vires* concerns.

- Provide a formal legal opinion on the legality and appropriateness of the proposed arrangement.
- Assess and advise on compliance requirements arising from all applicable legislation and regulatory frameworks, including non-profit governance laws, company law requirements, and relevant public finance and treasury regulatory prescripts.

The service provider must develop or advise on an appropriate governance and risk management framework, including:

- Recommendations on the legal structuring of the entity as an independent non-profit body governed by an independent board, including appropriate representation arrangements for the SAMRC in line with the approval.
- Drafting or advising on a Memorandum of Agreement or similar governance instrument to regulate institutional relationships, governance structures, fiduciary duties, branding arrangements, and conditions of engagement.
- Development of provisions governing dissolution or termination arrangements, including the stipulated triggers related to regulatory non-compliance, financial mismanagement, mandate failure, reputational risk, or strategic misalignment, as well as procedures for the accountable winding down of operations and treatment of donor funds.
- Advice on measures to mitigate risks associated with dual or parallel funding streams, including potential distortions, inequities, or internal tensions that may arise from differential funding conditions or reimbursement structures.

The service provider must:

- Assess the implications of providing seed funding, grants, or in-kind support to the proposed entity from the perspective of applicable public finance legislation.
- Advise on consultation requirements with relevant treasury authorities to secure guidance on compliant arrangements for disbursement, oversight, monitoring and reporting relating to any institutional support provided.

The service provider must advise on mechanisms to strengthen financial governance and accountability of the Foundation, including:

- Independent audit requirements;
- Periodic financial and performance reporting arrangements;
- Appropriate reporting lines to oversight and stakeholder structures; and

- Controls necessary to safeguard funds, manage fiduciary risk and support institutional integrity and credibility.

The service provider must assess and advise on safeguards to ensure that:

- The proposed entity remains aligned to the institution's strategic mandate and broader national priorities;
- Its operations do not duplicate, undermine or compete with existing institutional programmes or structures; and
- Its independence is balanced with appropriate strategic coherence and accountability.

### **Deliverables**

The deliverables for this scope of work include:

- An independent verification report suitable for submission to the Minister of Health that all conditions precedent set by the Minister have been or can be met. In the case of the latter, a clear roadmap shall be necessary. The report shall specifically address each of the requirements as set out in the Scope of Work above.
- All supporting documentation (copies of documents reviewed, draft conditions/ agreements and frameworks)

### **Required Expertise**

The service provider must demonstrate access to expertise and a track record in South African legislation, regulations (including in relation to the public sector), compliance, corporate governance, and finance. This includes experts with at least the following qualifications: legal (admitted attorneys) with public-sector focus, corporate and financial governance (such as qualified CA(SA)/accounting officers) or equivalent.

### **Submissions**

Submissions must include the following:

#### **Mandatory Requirements (For eligibility assessment)**

1. Valid tax clearance or PIN
2. CSD registration
3. Company registration documents
4. BBBEE status
- 5.

### **Additional Mandatory Requirements (Scored)**

6. Proposal with clear outline of the approach, work and timelines, addressing the required scope of work, and summary of relevant expertise and experience of the team, together with:

- CVs of lead consultant(s) and team
- References: Portfolio of at least 5 contactable references with a similar scope. Full contact details including relevant contact person, nature of service and period (start and end dates).
- Price quotation valid for 30 days. Please complete the pricing schedule, listing all resources on the project, hourly rates and estimated hours to complete the work, together with a total for the complete scope of work. The work is expected to be completed within no more than 1 month. All fees and expenses must be clearly outlined.

Submissions meeting the minimum requirements for functionality will be evaluated on price (including alignment with RFQ budget and cost-effectiveness) and BBBEE level.

### **Call for proposals and quotations**

Potential bidders can contact **Supply Chain Management** via email at [scm@mrc.ac.za](mailto:scm@mrc.ac.za) from SAMRC for additional information to prepare their proposal and quote.

A virtual non-compulsory briefing session will be held on 18 June 2026 @ 11:00. Those who wish to attend must send an email to [scm@mrc.ac.za](mailto:scm@mrc.ac.za) to get an MS Teams link to join.

**Table 1. Evaluation / selection guidance criteria**

<b>Criteria</b>	<b>Ref No.</b>	<b>Description</b>	<b>Weight (%)</b>	<b>Min pre-qualification percentage</b>	<b>Preference points system</b>
Functionality (Total=100%)	<b>1</b>	Company profile, core business and team CVs. Relevant, demonstrated specialist expertise, experience, track record and certification (e.g. registered with appropriate professional bodies, such as the Legal Practice Council, SAICA, etc. or equivalent) in relation to the scope of work.	<b>50</b>	<b>75%</b>	
	<b>2</b>	Methodology and work plan linked to the project activities and resources.	<b>30</b>		
	<b>3</b>	References applicable to the scope of work. References relating to work with national public research institutions and private NPCs would be an added advantage.	<b>20</b>		
Price					<b>80</b>
Specific goals					<b>20</b>
					<b>100</b>

**Table 2. Rating guideline for functionality criteria**

Functionality criteria Ref No.			Rating Guidelines			
	Unacceptable (U) = 0%	Poor (P) = 20%	Average (A) = 40%	Satisfactory (S) = 60%	Good (G) = 80%	Excellent (E) = 100%
	No information supplied. OR Information supplied indicates no experience and technical competence of the company in offering the service required in this proposal.	Company profile and core business. Information supplied indicates poor experience and technical competence of the company in offering the service required in this proposal	Company profile and core business. Information supplied indicates average experience and technical competence of the company in offering the service required in this proposal	Company profile and core business. Information supplied indicates satisfactory experience and technical competence of the company in offering the service required in this proposal	Company profile and core business. Information supplied indicates good experience and technical competence of the company in offering the service required in this proposal	Company profile and core business. Information supplied indicates excellent experience and technical competence of the company in offering the service required in this proposal
	No experience and Methodology	Up to 1-year relevant experience and poor Methodology	Up to 2 years' relevant experience and poor Methodology	Up to 3 years' relevant experience and reasonable Methodology	Up to 4 to 5 years' relevant experience in business and sound Methodology	Greater than 6 years' relevant experience in business and good Methodology
	No references	Portfolio of 1 contactable reference with a similar scope.	Portfolio of 2 contactable references with a similar scope.	Portfolio of 3 contactable references with a similar scope.	Portfolio of 4 contactable references with a similar scope.	Portfolio of 5 contactable references with a similar scope.

*NB: Where the rating guideline above does not provide for the information provided by the bidder, the evaluator reserves the right to allocate closest or any score as he/she sees fit.*

## Pricing Schedule

### Professional Fees by Deliverable

Description	Estimated Time	Total Cost (ex-vat)
Cost of overall scope of works	One (1) Month	
Sub-Total (ex-vat)		

### Resource-Based Pricing Summary

Resource	Qualification/Registration	Hourly Rate (excluding VAT)	Estimated hours	Total Cost (excluding VAT)
Lead Legal Advisor	Admitted Attorney / LPC Registered			
Corporate Governance Specialist	Governance / Compliance Expert			
Financial Governance Specialist	CA(SA) / Accounting Officer			
Risk Management Specialist	Risk & Compliance Expert			
Public Finance Specialist	PFMA / Treasury Specialist			
Project Manager	Project Management Professional			
Administrative Support	Administrative Support			
Sub-Total (ex-vat)				

### Disbursements

Description	Unit Cost (ZAR)	Quantity	Total Cost (ZAR)
Travel and accommodation (if applicable)			
Other disbursements (specify)			
Sub-Total (ex-vat)			

**Pricing Summary**

<b>Description</b>	<b>Amount (ZAR)</b>
Subtotal Project Fees	
Subtotal Resource-Based Pricing Summary	
Subtotal Disbursements	
<b>VAT (15%)</b>	
<b>Total Quotation Amount (Including VAT)</b>	