



**INVITATION TO BID: FMA 0006-2022/23**

**VALIDITY PERIOD OF BID OFFER: 90 DAYS FROM CLOSING DATE**

**THE DEPARTMENT OF THE PREMIER WISHES TO INVITE POTENTIAL BIDDERS IN THE SYSTEMS COACHING SERVICES SECTOR TO PROVIDE A SYSTEMS COACHING PROGRAMME TO THE DEPARTMENT OF THE PREMIER WITHIN THE WESTERN CAPE GOVERNMENT FOR A PERIOD OF 36 (THIRTY-SIX) MONTHS.**

**BID NUMBER:** FMA 0006-2022/23

**Contact person:** Janetta Botha

**Date of advertisement:** 18 November 2022

**Closing Date and Time:** 12 December 2022 at 11H00

**Briefing Session:** Wednesday, 30 November 2022 @ 10H00  
via Microsoft Teams (Online Application)

In order to participate, potential Bidders must ensure that an e-mail address (representative) is sent to [Ashwin.Nayar@westerncape.gov.za](mailto:Ashwin.Nayar@westerncape.gov.za) on or before Tuesday, 29 November 2022 at 15H00.

**NB! Microsoft Teams Application needs to be installed on the relevant platform in order to participate (e.g. Cell Phone, Laptop and or Desktop).**

**Late bid offers shall not be admitted for consideration.**

**Bidders to note that should the Bid document be too big to fit into the Bid Box, to please contact the following Supply Chain Management official/s who will ensure that bid documents gets deposited into the bid box before the closing date and time:**

**Ashwin Nayar – 021 483 4679 and Kim-Leigh February - 021 483 2943.**

**Completed and signed (in ink) bid documents must be submitted on the official bid forms and may not be re-typed.**

Completed and signed (in ink) bid documents if posted must be addressed to:

The Director, Supply Chain Management and Administration, P.O. Box 659 Cape Town, 8000 and sufficient time must be allowed for the delivery of the bid to the offices of SCM, situated in 7 Wale Street, Cape Town.

Or

**DEPOSITED IN THE DEPARTMENT OF THE PREMIER TENDER BOX SITUATED ON THE GROUND FLOOR (ENTRANCE) OF NO. 4 DORP STREET, CAPE TOWN (CNR KEEROM AND DORP STREET) before the closing time of the bid.**

RFB/s will be regarded as late if received after the closing time of the bid.

The Department of the Premier (DotP) reserves the right to cancel the bid at any stage of the process.

**ALL PRICES MUST BE QUOTED IN RSA CURRENCY AND MUST BE INCLUSIVE OF VAT.**

The service provider/s must comply with the conditions for the processing of personal information as prescribed by the Protection of Personal Information Act, No 4 of 2013 (POPI). The service provider/s is required to provide the WCG with a certificate confirming that the personal information provided to the service provider/s by the WCG has been destroyed.

This bid is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations 2017, the General Conditions of Contract (GCC) and any other Conditions and or Special Conditions of Contract that might be stipulated in the requirement. Bidder's attention is drawn to the fact that amendments to any of the Bid Conditions or setting of counter conditions by bidders may result in the invalidation of such bids.

The successful bidder will be required to sign a written contract form within 7 days after the award of the bid.

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**PLEASE NOTE THAT THIS BID IS A 2 ENVELOPE SYSTEM AND THE BELOW LABELS  
MUST BE USED WHEN SUBMITTING YOUR BID DOCUMENTS**

ENVELOPE ONE

**BID: FMA 0006-2022/23: THE DEPARTMENT OF THE PREMIER WISHES TO INVITE  
POTENTIAL BIDDERS IN THE SYSTEMS COACHING SERVICES SECTOR TO PROVIDE A  
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THIS ENVELOPE CONTAINS THE COMPLETE BID DOCUMENT WITHOUT THE WCBD 3.3  
(PRICING SCHEDULE), AND MUST PLEASE BE DEPOSITED IN THE BID BOX/POSTED IN  
THE SAME MANNER.

KINDLY INSERT THE NAME OF BIDDING COMPANY.

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ENVELOPE TWO

**BID: FMA 0006-2022/23: THE DEPARTMENT OF THE PREMIER WISHES TO INVITE  
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WESTERN CAPE GOVERNMENT FOR A PERIOD OF 36 (THIRTY-SIX) MONTHS.**

THIS ENVELOPE CONTAINS THE WCBD 3.3 (PRICING SCHEDULE), AND MUST PLEASE BE  
DEPOSITED IN THE BID BOX/POSTED IN THE SAME MANNER.

KINDLY INSERT THE NAME OF BIDDING COMPANY.

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**NOTE: KINDLY CUT AND PASTE ON THE RELEVANT ENVELOPES**

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## PART A INVITATION TO BID

### ZERO-TOLERANCE TO FRAUD, THEFT AND CORRUPTION (ANTI-FRAUD, THEFT AND CORRUPTION)

THE WCG IS COMMITTED TO GOVERN ETHICALLY AND TO COMPLY FULLY WITH ANTI-FRAUD, THEFT AND CORRUPTION LAWS AND TO CONTINUOUSLY CONDUCT ITSELF WITH INTEGRITY AND WITH PROPER REGARD FOR ETHICAL PRACTICES.

THE WCG HAS A ZERO TOLERANCE APPROACH TO ACTS OF FRAUD, THEFT AND CORRUPTION BY ITS OFFICIALS AND ANY SERVICE PROVIDER CONDUCTING BUSINESS WITH THE WCG.

THE WCG EXPECTS ALL ITS OFFICIALS AND ANYONE ACTING ON ITS BEHALF TO COMPLY WITH THESE PRINCIPLES TO ACT IN THE BEST INTEREST OF THE WCG AND THE PUBLIC AT ALL TIMES.

THE WCG IS COMMITTED TO PROTECTING PUBLIC REVENUE, EXPENDITURE, ASSETS AND REPUTATION FROM ANY ATTEMPT BY ANY PERSON TO GAIN FINANCIAL OR OTHER BENEFIT IN AN UNLAWFUL, DISHONEST OR UNETHICAL MANNER.

INCIDENTS AND SUSPICIOUS ACTIVITIES WILL BE THOROUGHLY INVESTIGATED AND WHERE CRIMINAL ACTIVITY IS CONFIRMED, RESPONSIBLE PARTIES WILL BE PROSECUTED TO THE FULL EXTENT OF THE LAW.

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>							
BID NUMBER:	FMA 0006-2022/23	CLOSING DATE:	12 December 2022	CLOSING TIME:	11H00		
DESCRIPTION	THE DEPARTMENT OF THE PREMIER WISHES TO INVITE POTENTIAL BIDDERS IN THE SYSTEMS COACHING SERVICES SECTOR TO PROVIDE A SYSTEMS COACHING PROGRAMME TO THE DEPARTMENT OF THE PREMIER WITHIN THE WESTERN CAPE GOVERNMENT FOR A PERIOD OF 36 (THIRTY-SIX) MONTHS.						
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>							
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT THE GROUND FLOOR (ENTRANCE) OF NO. 4 DORP STREET, CAPE TOWN (CNR KEEROM AND DORP STREET) before the closing time of the bid.							
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>				<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>			
CONTACT PERSON	Ashwin Nayar / Kim-Leigh February			CONTACT PERSON	Janetta Botha		
TELEPHONE NUMBER	021-483-4679 / 021-483-2943			TELEPHONE NUMBER	021-466-9700/6		
FACSIMILE NUMBER	N/A			FACSIMILE NUMBER	N/A		
E-MAIL ADDRESS	<a href="mailto:Ashwin.Nayar@westerncape.gov.za">Ashwin.Nayar@westerncape.gov.za</a> ; <a href="mailto:Kim-Leigh.February@westerncape.gov.za">Kim-Leigh.February@westerncape.gov.za</a>			E-MAIL ADDRESS	<a href="mailto:Janetta.Botha@westerncape.gov.za">Janetta.Botha@westerncape.gov.za</a>		
<b>SUPPLIER INFORMATION</b>							
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	WCSEB No.		TCS PIN:		AND	CSD 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		
IF YES, WAS THE CERTIFICATE ISSUED BY A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN NATIONAL ACREDITATION SYSTEM (SANAS)	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No						

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18/12/2019

**[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMEs& QSEs) MUST BE SUBMITTED TOGETHER WITH A COMPLETED 6.1 IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]**

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 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, 2017, 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 (W CBD7).**

**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 VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILED THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE WITH TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE AND CSD NUMBER AS MENTIONED IN 2.3 ABOVE.
- 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:

.....

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PRICING SCHEDULE

**(Professional Services)**

**WCBD 3.3**

Name of Bidder: .....Bid number: **FMA 0006-2022/23**

Closing Time: **11:00**

Closing date: **09 December 2022**

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

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**THE DEPARTMENT OF THE PREMIER WISHES TO INVITE POTENTIAL BIDDERS IN THE SYSTEM COACHING SERVICES SECTOR TO PROVIDE A SYSTEM COACHING PROGRAM TO THE DEPARTMENT OF THE PREMIER WITHIN THE WESTERN CAPE GOVERNMENT FOR A PERIOD OF 36(THIRTY-SIX) MONTHS**

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**Notes:** For evaluation purposes, provide a total fixed all-inclusive price for Year 1 only by adding the price of each line item tabulated below. Subject to the terms and conditions set out in the Terms of Reference, the fixed all-inclusive hourly / unit price rate per line item referred to below may be increased annually for Year 2 and Year 3 on the anniversary of the commencement date of the contract at a rate not more than the applicable official Consumer Price Index (CPIX) rate determined by Statistics South Africa, of the anniversary of the commencement date. The successful bidder will have to apply for this increase on an annual basis, as it is subject to the prior written approval of the Western Cape Government.

Please ensure that the amount quoted per tabulated line item is the all-inclusive fixed unit price payable in Year 1. **Service provider to indicate unit price per item and to note that this is for evaluation purposes only:**

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<b>QUANTITY</b>	<b>SERVICE</b>	<b>Total Bid price in RSA currency (all applicable taxes included) Year 1 (UNIT PRICE ONLY)</b>
1 plan	Systems Coaching plan	R
1 hour	One (1) Lead expert facilitator (Systems Coach) to facilitate face to face group session	R
1 hour	One (1) Lead expert facilitator (Systems Coach) to facilitate virtual group session	R
1 hour	One-on-one face to face coaching session with a leader (Systems Coach)	R
1 hour	One-on-one virtual coaching session with a leader (Systems Coach)	R
1 hour	Observation session of leadership in context (Systems Coach)	R
1 report	Generation of individual report	R
1 report	Generation of system/ theme report	R
1 plan	Generation of Action Plan	R
1	Platform to be utilised for 360 assessment questionnaire (Consider 1 person with 6 raters)	R
1	Design and Development of one four (4) hour culture competencies content/ module.	
1	Transferring of one (1), four (4) hour Culture competencies module to e-	

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	learning content and the e-learning platform.	
1	Access and use of an interactive e-learning platform for one (1) employee, for one (1) year	
<b>TOTAL</b>		R

**\*The Department reserves the right to select the appropriate book option based on the need.**

**\*The Department reserves the right to select the appropriate mode of facilitation option based on the need or circumstances.**

Please provide details of duly designated or authorised person submitting the price schedule on behalf of the bidder:

**Print Name(s) and Surname:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**For Bidding enquiries:**

Name: Kim-Leigh February /Ashwin Nayar

E-mail: [kim-leigh.february@westerncape.gov.za](mailto:kim-leigh.february@westerncape.gov.za)/ [Ashwin.Nayar@westerncape.gov.za](mailto:Ashwin.Nayar@westerncape.gov.za)

Tel: 021-483-2943/021-483-4679

**For Technical enquiries:**

Name: Janetta Botha

E-mail: [Janetta.Botha@westerncape.gov.za](mailto:Janetta.Botha@westerncape.gov.za)

Tel: 021-466-9700/6

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## PROVINCIAL GOVERNMENT WESTERN CAPE

### DECLARATION OF INTERESTS, BIDDERS PAST SCM PRACTICES AND INDEPENDENT BID DETERMINATION

1. To give effect to the requirements of the Western Cape Provincial Treasury Instructions, 2019: Supply Chain Management (Goods and Services), Public Finance Management Act (PFMA) Supply Chain Management (SCM) Instruction No. 3 of 2021/2022 - SBD 4 Declaration of Interest, Section 4 (1)(b)(iii) of the Competition Act No. 89 of 1998 as amended together with its associated regulations, the Prevention and Combating of Corrupt Activities Act No 12 of 2004 and regulations pertaining to the tender defaulters register, Paragraph 16A9 of the National Treasury Regulations and/or any other applicable legislation.
2. 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.
3. All prospective bidders intending to do business with the Institution must be registered on the Central Supplier Database (CSD) and the Western Cape Supplier Evidence Bank (WCSEB) if they wish to do business with the Western Cape Government (WCG) via the electronic Procurement Solution (ePS).
4. The status of enterprises and persons listed on the National Treasury's Register for Tender Defaulters will be housed on the ePS. Institutions may not under any circumstances procure from enterprises and persons listed on the Database of Tender Defaulters.
5. The status of suppliers listed on the National Treasury's Database of Restricted Suppliers will be housed on the ePS; however, it remains incumbent on institutions to check the National Treasury Database of Restricted Suppliers before the conclusion of any procurement process. For suppliers listed as restricted, institutions must apply due diligence and risk assessment before deciding to proceed with procurement from any such supplier.

#### 6. Definitions

**"bid"** means a bidder's response to an institution's invitation to participate in a procurement process which may include a bid, price quotation or proposal;

**"Bid rigging (or collusive bidding)"** occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and/or services through a bidding process. Bid rigging is, therefore, an agreement between competitors;

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

*This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.*



**"business interest"** means -

- (a) a right or entitlement to share in profits, revenue or assets of an entity;
- (b) a real or personal right in property;
- (c) a right to remuneration or any other private gain or benefit, or
- (d) includes any interest contemplated in paragraphs (a), (b) or (c) acquired through an intermediary and any potential interest in terms of any of those paragraphs;

**"Consortium or Joint Venture"** 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;

**"Controlling interest"** means, 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;

**"Corruption"**- General offences of corruption are defined in the Combating of Corrupt Activities Act, 2004 (Act No 12 of 2004) as:

Any person who directly or indirectly -

- (a) accepts or agrees or offers to accept any gratification from any other person, whether for the benefit of himself or herself or for the benefit of another person; or
- (b) gives or agrees or offers to give to any other person any gratification, whether for the benefit of that other person or for the benefit of another person, in order to act personally or by influencing another person so to act, in a manner—
  - (i) that amounts to the-
    - (aa) illegal, dishonest, unauthorised, incomplete, or biased; or
    - (bb) misuse or selling of information or material acquired in the course of the exercise, carrying out or performance of any powers, duties or functions arising out of a constitutional, statutory, contractual or any other legal obligation;
  - (ii) that amounts to-
    - (aa) the abuse of a position of authority;
    - (bb) a breach of trust; or
    - (cc) the violation of a legal duty or a set of rules;
  - (iii) designed to achieve an unjustified result; or
  - (iv) that amounts to any other unauthorised or improper inducement to do or not to do anything, of the, is guilty of the offence of corruption.

**"CSD"** means the Central Supplier Database maintained by National Treasury;

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

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**"employee"**, in relation to –

- (a) a department, means a person contemplated in section 8 of the Public Service Act, 1994 but excludes a person appointed in terms of section 12A of that Act; and
- (b) a public entity, means a person employed by the public entity;

**"entity"** means any -

- (a) association of persons, whether or not incorporated or registered in terms of any law, including a company, corporation, trust, partnership, close corporation, joint venture or consortium; or
- (b) sole proprietorship;

**"entity conducting business with the Institution"** means an entity that contracts or applies or tenders for the sale, lease or supply of goods or services to the Province;

**"Family member"** means a person's -

- (a) spouse; or
- (b) child, parent, brother, sister, whether such a relationship results from birth, marriage or adoption or some other legal arrangement (as the case may be);

**"intermediary"** means a person through whom an interest is acquired, and includes a representative or agent or any other person who has been granted authority to act on behalf of another person;

**"Institution"** means –

a provincial department or provincial public entity listed in Schedule 3C of the Act;

**"Provincial Government Western Cape (PGWC)"** means

- (a) the Institution of the Western Cape, and
- (b) a provincial public entity;

**"RWOEE"** means -

Remunerative Work Outside of the Employee's Employment

**"spouse"** means a person's -

- (a) partner in marriage or civil union according to legislation;
- (b) partner in a customary union according to indigenous law; or
- (c) partner with whom he or she cohabits and who is publicly acknowledged by the person as his or her life partner or permanent companion.

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

*This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.*

7. Regulation 13(c) of the Public Service Regulations (PSR) 2016, effective 1 February 2017, prohibits any employee from conducting business with an organ of state, or holding a directorship in a public or private company doing business with an organ of state unless the employee is a director (in an official capacity) of a company listed in schedules 2 and 3 of the Public Finance Management Act.
  - a) Therefore, by 31 January 2017 all employees who are conducting business with an organ of state should either have:
    - (i) resigned as an employee of the government institution or;
    - (ii) cease conducting business with an organ of state or;
    - (iii) resign as a director/shareholder/owner/member of an entity that conducts business with an organ of state.
8. Any legal person, or their family members, may make an offer or offers in terms of this invitation to bid. In view of potential conflict of interest, in the event that the resulting bid, or part thereof, be awarded to family members of persons employed by an organ of state, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where the bidder is employed by the Institution.
9. The bid of any bidder may be disregarded if that bidder or any of its directors abused the institution's supply chain management system; committed fraud or any other improper conduct in relation to such system; disclosure is found not to be true and complete; or failed to perform on any previous contract.
10. Section 4(1)(b)(iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a per se prohibition meaning that it cannot be justified under any grounds.
11. Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorises accounting officers and accounting authorities to:
  - a) disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
  - b) cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
12. Communication between partners in a joint venture or consortium will not be construed as collusive bidding.

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

*This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.*

13. 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.

SECTION A DETAILS OF THE ENTITY	
CSD Registration Number	MAAA
Name of the Entity	
Entity registration Number (where applicable)	
Entity Type	
Tax Reference Number	

Full details of directors, shareholder, member, partner, trustee, sole proprietor or any persons having a controlling interest with a right or entitlement to share in profits, revenue or assets of the entity should be disclosed in the Table A below.

TABLE A

FULL NAME	DESIGNATION (Where a director is a shareholder, both should be confirmed)	IDENTITY NUMBER	PERSONAL TAX REFERENCE NO.	PERCENTAGE INTEREST IN THE ENTITY

If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701

This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.

**SECTION B: DECLARATION OF THE BIDDER'S INTEREST**

The supply chain management system of an institution must, irrespective of the procurement process followed, prohibit any award to an employee of the state, who either individually or as a director of a public or private company or a member of a close corporation, seek to conduct business with the WCG, unless such employee is in an official capacity a director of a company listed in Schedule 2 or 3 of the PFMA as prescribed by the Public Service Regulation 13(c).

Furthermore, an employee employed by an organ of state conducting remunerative work outside of the employee's employment should first obtain the necessary approval by the delegated authority (RWOEE), failure to submit proof of such authority, where applicable, may result in disciplinary action.

<b>B1.</b>	Are any persons listed in Table A identified on the CSD as employees of an organ of state? (If yes, refer to Public Service Circular EIM 1/2016 to exercise the listed actions)	NO	YES
<b>B2.</b>	Are any employees of the entity also employees of an organ of state? (If yes complete Table B and attach their approved "RWOEE")	NO	YES
<b>B3.</b>	Are any family members of the persons listed in Table A employees of an organ of state? (If yes complete Table B)	NO	YES

**TABLE B**

Details of persons (family members) connected to or employees of an organ of state should be disclosed in Table B below.

FULL NAME OF EMPLOYEE	IDENTITY NUMBER	DEPARTMENT/ ENTITY OF EMPLOYMENT	DESIGNATION/ RELATIONSHIP TO BIDDER**	INSTITUTION EMPLOYEE NO./ PERSAL NO. (Indicate if not known)

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.

**SECTION C: PERFORMANCE MANAGEMENT AND BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES**

To enable the prospective bidder to provide evidence of past and current performance.

<b>C1.</b>	Did the entity conduct business with an organ of state in the last twelve months? (If yes complete Table C)	NO	YES
------------	--	----	-----

**C2. TABLE C**

Complete the below table to the maximum of the last 5 contracts.

NAME OF CONTRACTOR	PROVINCIAL DEPARTMENT OR PROVINCIAL ENTITY	TYPE OF SERVICES OR COMMODITY	CONTRACT/ ORDER NUMBER	PERIOD OF CONTRACT	VALUE OF CONTRACT
<b>C3.</b> Is the entity or its principals listed on the National Database as companies or persons prohibited from doing business with the public sector?					NO YES
<b>C4.</b> Is the entity or its principals listed on the National Treasury Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No. 12 of 2004)?					NO YES
(To access this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> , click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 326 5445.)					
<b>C5.</b> If yes to C3 or C4, were you informed in writing about the listing on the database of restricted suppliers or Register for Tender Defaulters by National Treasury?				NO	YES N/A
<b>C6.</b> Was the entity or persons listed in Table A convicted for fraud or corruption during the past five years in a court of law (including a court outside the Republic of South Africa)?					NO YES
<b>C7.</b> Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?					NO YES

If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701

This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.

**SECTION D: DULY AUTHORISED REPRESENTATIVE TO DEPOSE TO AFFIDAVIT**

*This form must be signed by a duly authorised representative of the entity in the presence of a commissioner of oaths.*

- I, ..... hereby swear/affirm;
- i. that the information disclosed above is true and accurate;
  - ii. that I have read understand the content of the document;
  - iii. that I have arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.
  - iv. that the entity undertakes to independently arrive at any offer at any time to the Institution without any consultation, communication, agreement or arrangement with any competitor. In addition, that there will be no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specification, 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;
  - v. that the entity or its representative are aware of and undertakes not to disclose the terms of any bid, formal or informal, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract; and
  - vi. that there have been no consultations, communications, agreements or arrangements made 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 that my entity was not involved in the drafting of the specifications or terms of reference for this bid.

**DULY AUTHORISED REPRESENTATIVE'S SIGNATURE**

I certify that before administering the oath/affirmation I asked the deponent the following questions and wrote down his/her answers in his/her presence:

- 1.1 Do you know and understand the contents of the declaration? ANSWER: .....
- 1.2 Do you have any objection to taking the prescribed oath? ANSWER: .....
- 1.3 Do you consider the prescribed oath to be binding on your conscience? ANSWER: .....
- 1.4 Do you want to make an affirmation? ANSWER: .....
2. I certify that the deponent has acknowledged that he/she knows and understands the contents of this declaration, which was sworn to/affirmed and the deponent's signature/thumbprint/mark was place thereon in my presence.

.....  
SIGNATURE FULL NAMES Commissioner of Oaths

Designation (rank) ..... ex officio: Republic of South Africa

Date: ..... Place .....

Business Address: .....

**If you know of any corrupt, fraudulent or collusive actions in the Institution, please report it by calling the National Hotline 0800 701 701**

*This form must be completed annually. Should the information herein declared change in the course of the year or before the next renewal or in relation to any bid, quotation or contract, it is the entity's responsibility to advise the Institution in writing of the change in such details.*



## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017 AND CODES OF GOOD PRACTICE

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS (TENDERERS) MUST STUDY THE BROAD BASED BLACK ECONOMIC EMPOWERMENT ACT AND THE CODES OF GOOD PRACTICE**

### 1. DEFINITIONS

- 1.1 **“acceptable tender”** means any tender which, in all respects, complies with the specifications and conditions of tender as set out in the tender document.
- 1.2 **“affidavit”** is a type of verified statement or showing, or in other words, it contains a verification, meaning it is under oath or penalty of perjury, and this serves as evidence to its veracity and is required for court proceedings.
- 1.3 **“all applicable taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 1.4 **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 1.5 **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 1.6 **“bid”** means a written offer on the official bid documents or invitation of price quotations and “tender” is the act of bidding /tendering; ***(Therefore in the context of the 2017 regulations “bidder” and “tenderer” have the same meaning***
- 1.7 **“Code of Good Practice”** means the generic codes or the sector codes as the case may be;
- 1.8 **“consortium or joint venture”** 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;
- 1.9 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 1.10 **“EME”** is an Exempted Micro Enterprise with an annual total revenue of R10 million or less.

- 1.11 **"Firm price"** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 1.12 **"functionality"** means the ability of a tenderer to provide goods or services in accordance with specification as set out in the tender documents;
- 1.13 **"Large Enterprise"** is any enterprise with an annual total revenue above R50 million;
- 1.14 **"non-firm prices"** means all prices other than "firm" prices;
- 1.15 **"person"** includes a juristic person;
- 1.16 **"price"** includes all applicable taxes less all unconditional discounts;
- 1.17 **"proof of B-BBEE status level contributor"** means-
- (a) The B-BBEE status level certificate issued by an authorized body or person;
  - (b) A sworn affidavit as prescribed in terms of the B-BBEE Codes of Good Practice; or
  - (c) Any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act.
- 1.18 **QSE** is a Qualifying Small Enterprise with an annual total revenue between R10 million and R50 million;
- 1.19 **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of the tender invitation;
- 1.20 **"sub-contract"** means the primary contractor's assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 1.21 **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000);
- 1.22 **"the Regulations"** means the Preferential Procurement Regulations, 2017;
- 1.23 **"total revenue"** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 11 October 2013;
- 1.24 **"trust"** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 1.25 **"trustee"** means any person, including the founder of a trust, to whom property is bequeathed in

order for such property to be administered for the benefit of another person.

## 2. GENERAL CONDITIONS

2.1 The following preference point systems are applicable to all bids:

- 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).

2.2 Preference point system for this bid:

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

2.3 Preference points for this bid shall be awarded for:

- (a) Price; and  
(b) B-BBEE Status Level of Contribution.

2.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

2.5 Failure on the part of a bidder to fill in, sign this form and submit in the circumstances prescribed in the Codes of Good Practice either a B-BBEE Verification Certificate issued by a Verification Agency accredited by the South African Accreditation System (SANAS) or an affidavit confirming annual total revenue and level of black ownership together with the bid or an affidavit issued by Companies Intellectual Property Commission, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

2.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

### 3. ADJUDICATION USING A POINT SYSTEM

- 3.1 Subject to Regulation 11 of the Regulations, the bidder obtaining **the highest number of total points** will be awarded the contract.
- 3.2 A tenderer must submit proof of its B-BBEE status level of contributor in order to claim points for B-BBEE.
- 3.3 A tenderer failing to submit proof of B-BBEE status level of contributor or is a non-compliant contributor to B-BBEE will not be disqualified but will only score:
- (a) points out of 80 for price; and
  - (b) 0 points out of 20 for B-BBEE
- 3.4 Points scored must be rounded off to the nearest 2 decimal places.
- 3.5 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 3.6 When functionality is part of the evaluation process and two or more bids have scored equal total points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest points for functionality.
- 3.7 Should two or more bids be equal in all respects; the award shall be decided by the drawing of lots.

### 4. POINTS AWARDED FOR PRICE

#### 4.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEM

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

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

Where

- $P_s$  = Points scored for price of bid under consideration
- $P_t$  = Price of tender under consideration
- $P_{\min}$  = Price of lowest acceptable tender

## 5. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTION

- 5.1 In terms of Regulation 6 (2) and 7 (2) of the Regulations preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

- 5.2 An **EME** must submit a valid, originally certified affidavit confirming annual turnover and level of black ownership or an affidavit issued by Companies Intellectual Property Commission
- 5.3 A **QSE that is less than 51% (50% or less) black owned** must be verified in terms of the QSE scorecard issued via Government Gazette and submit a valid, original or a legible certified copy of a B-BBEE Verification Certificate issued by SANAS.
- 5.4 A **QSE that is at least 51% black owned (51% or higher)** must submit a valid, originally certified affidavit confirming turnover and level of black ownership as well as declare its empowering status or an affidavit issued by Companies Intellectual Property Commission.
- 5.5 A **large enterprise** must submit a valid, original or originally certified copy of a B-BBEE Verification Certificate issued by a verification agency accredited by SANAS.
- 5.6 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 5.7 A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE status level verification certificate for every separate tender.
- 5.8 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

- 5.9 A tenderer may not be awarded points for B-BBEE status level of contributor if the bid documents indicate that the tenderer intends sub-contracting more than 25% of the value of the contract to any other person not qualifying for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.
- 5.10 A tenderer awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level of contributor than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

## 6. BID DECLARATION

- 6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

## 7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPH 5

- 7.1 B-BBEE Status Level of Contribution..... = ..... (*maximum of 20 points*)

*(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or an affidavit confirming annual total revenue and level of black ownership in terms of the relevant sector code applicable to the tender.)*

## 8. SUB-CONTRACTING

- 8.1 Will any portion of the contract be sub-contracted? **YES / NO** (*delete which is not applicable*)

- 8.1.1 If yes, indicate:

- (i) what percentage of the contract will be subcontracted? .....%
- (ii) the name of the sub-contractor? .....
- (iii) the B-BBEE status level of the sub-contractor? .....
- (iv) whether the sub-contractor is an EME or QSE? **YES / NO** (*delete which is not applicable*)

- 8.1.2 Sub-contracting relates to a **particular** contract and if sub-contracting is applicable, the bidder to state in their response to a particular RFQ that a portion of that contract will be sub-contracted.

## 9. DECLARATION WITH REGARD TO COMPANY/FIRM

- 9.1 Name of company/ entity: .....
- 9.2 VAT registration number: .....
- 9.3 Company Registration number: .....

**9.4 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contribution indicated in paragraph 7 above, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:**

- (a) The Western Cape Government reserves the right to audit the B-BBEE status claim submitted by the bidder.**
- (b) As set out in Section 130 of the B-BBEE Act as amended, any misrepresentation constitutes a criminal offence. A person commits an offence if that person knowingly:**
  - (i) misrepresents or attempts to misrepresent the B-BBEE status of an enterprise;**
  - (ii) provides false information or misrepresents information to a B-BBEE Verification Professional in order to secure a particular B-BBEE status or any benefit associated with compliance to the B-BBEE Act;**
  - (iii) provides false information or misrepresents information relevant to assessing the B-BBEE status of an enterprise to any organ of state or public entity; or**
  - (iv) engages in a fronting practice.**
- (c) If a B-BBEE verification professional or any procurement officer or other official of an organ of state or public entity becomes aware of the commission of, or any attempt to commit any offence referred to in paragraph 9.1 (a) above will be reported to an appropriate law enforcement agency for investigation.**
- (d) Any person convicted of an offence by a court is liable in the case of contravention of 9.4 (b) to a fine or to imprisonment for a period not exceeding 10 years or to both a fine and such imprisonment or, if the convicted person is not a natural person to a fine not exceeding 10% of its annual turnover.**
- (e) The purchaser may, if it becomes aware that a bidder may have obtained its B-BBEE status level of contribution on a fraudulent basis, investigate the matter. Should the investigation warrant a restriction be imposed, this will be referred to the National Treasury for investigation, processing and imposing the restriction on the National Treasury's List of Restricted Suppliers. The bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, may 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.**
- (f) The purchaser may, in addition to any other remedy it may have –**
  - (i) disqualify the person from the bidding process;**
  - (ii) recover costs, losses or damages it has incurred or suffered as a result of**



*that person's conduct;*

- (iii) 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; and*
- (iv) forward the matter for criminal prosecution.*

*(g) The information furnished is true and correct.*

*(h) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 2 of this form.*

**SIGNATURE(S) OF THE BIDDER(S): .....**

**DATE: .....**

**ADDRESS: .....**

**.....**

**WITNESSES:**

**1. ....**

**2. ....**

## TERMS OF REFERENCE

### TERMS OF REFERENCE FOR THE PROCUREMENT OF ROLL-OUT OF THE SYSTEMS COACHING PROGRAMME

#### 1 Purpose

The Department of the Premier wishes to invite potential bidders in the Systems Coaching Services Sector to provide **a Systems Coaching programme to the Department of the Premier within the Western Cape Government for a period of 36 (thirty-six) months**. These services would be required based on demand and as the needs within the Western Cape Government dictate.

- 1.1 Please note that the Western Cape Government may cancel the tender process at any time prior to the award of the tender contemplated herein for any of the following reasons:
  - 1.1.1 Due to changed circumstances, there is no longer a need for the services as specified in these Terms of Reference or there is no longer a need for such services on the terms set out in these Terms of Reference;
  - 1.1.2 Funds are no longer available to cover any envisaged expenditure;
  - 1.1.3 No acceptable bids are received; or
  - 1.1.4 There is a material irregularity in the tender process

#### 2. Background

- 2.1. The WCG Culture journey has been driven since 2019 and we are working towards creating a new way of work within WCG. The organisation has come to a point where a new way of working has come forward in various approaches and programmes and WCG needs to embed this into the system to enhance our culture. Culture needs to be actively spoken about and authentically lived. As such a culture recipe was created to combine leader led conversations, experiential learning, practices alignment, peer learning, measurement with targeted education based on facts and fundamentals about our culture's new way of work. The purpose of all of this is to effect necessary changes to allow for real and effective culture change which enhances citizen centricity.
- 2.2. The Behaviour Change Strategy (See Annexure A1, Behaviour Change Strategy Proposal and Annexure B1, Behaviour Change Strategy) identifies the desired behavioural norms which include Adaptability, Innovation, Data Intelligence, Sense Making, Cross Group Collaboration, Continuous Learning and Empathy and Compassion. The Enabling of

leaders through Values Based Leadership Development Programme (VBLDP), webinars, toolkits and coaching aims to provide ability and clarity on how the envisioned culture changes towards being more citizen centric and aligns with the identified Provincial Strategic Goals.

- 2.3. Cabinet and PTM signed off on the work from the WCG Behaviour Change Strategy in March 2021 for WCG Culture journey to drive system change. The WCG Culture Journey has a few key interventions that form part of its current implementation phase namely, Enabling of leaders, WCG Values Conversations, PM Practice Alignment, Culture Bootcamp and Measurement. The Enabling of leaders which is seen as the foundation that drives Leadership excellence and the role modelling of the vision which will come to life and be measured in the other interventions.
- 2.4. Coaching has the ability to influence perceptions of change and behaviours toward it as research indicates coaching impacts these emotions and cognitions during times of change, creating alignment between head, heart and hands. The coaching needed is however slightly different. Coaches unlock the potential of any leader to enable them to maximize their overall performance and their organizations. As such it is focused on helping an individual leader cope and achieve his/her full potential. System coaching is the most effective approach to aligning individuals – through the teams they work in – to the organisation they work for. Systemic Coaching has its roots in principles of Organisational Development, where the individual self is viewed in relationship to others around that individual, and in relation to the larger organisational or institutional ecosystem the individual and others belong to. In a systemic approach, ideally, both the individual and the group the individual belongs to should be coached, so that both are in alignment, and also in alignment with the ecosystem.
- 2.5. To capacitate our leaders to be able to navigate the realities of new ways of work and create working environments that are optimal and able to adapt to change, WCG leaders need support to grow their Emotional Intelligence and maturity. The Systems coaching programme is a bolstering of the enabling leaders change interventions by offering strategic support to top leadership to embody the changes we want to embed throughout the system. Leadership can then role model the change in behaviour required to act as change agents for what the organisation needs and create a positive employee experience.
- 2.6. In this programme, systems coaches are expected to propel effective service delivery by

enabling leaders to embody citizen-centricity. This expectation is based on research illustrating coaches as skilled professionals who affect powerful change in leaders by guiding and supporting them through change while enabling them to self-reflect, grow and strategise a way forward. System coaching will not only help leaders play their role towards achieving change success, but also offer valuable information to the other change programmes as to what in the organisation is inhibiting positive change. The coach and leadership will work together to create guidance as to questions that pertain to the system changes that are required to attain the new WCG Way.

## **2.7 BRIEFING SESSION**

2.7.1 A briefing session will be held on:

Date: 30 November 2022

Time: 10:00am

Venue: Microsoft Teams meeting invite

2.7.2 Bidders are requested to attend the virtual session so that clarification on the Terms of Reference and expectations of the Departments can be provided in respect of this invitation to bid.

2.7.3 Bidders, who did not receive the invitation of bid directly from the Department of the Premier, are furthermore requested to inform the Department of the Premier by email that it intends submitting a bid proposal to ensure that any further information and updates to the invitation of bid may be provided to them to enable Bidders to submit compliant bids.

## **3. Scope of Services / Deliverables**

3.1 In order to enable leaders to embody and role model the vision and aspirational culture, a Systems Coaching Programme has been identified. The support required in the intended systems approach, is as follows:

- Systems Coaching plan
- Leadership group sessions
- One-on-one sessions with leadership
- Observation sessions of leadership in context
- Generation of individual reports
- Generation of system report
- Generation of Action Plans
- Platform to be utilised for 360 assessment questionnaire: Reports provide an overview of strengths, weaknesses and behavioural blindspots; Rater selection (provision for multiple raters, including self-evaluation)

- Design and Development of content/ modules that enables culture competencies (Some examples of Culture competencies are: Adaptability, Innovation and creativity, Agile thinking, Cross group collaboration, Data intelligence/ sense making, Coping with uncertainty and Listening)
- The use of an interactive e-learning platform – creating an active and blended learning environment that leads to high completion rates, long-term knowledge retention and effective skills development.
- Transferring of the Culture competencies modules to e-learning content and the e-learning platform.

3.2 The Service Provider will need to comply with WCG branding requirements and ensure any content, promotional materials/ items used/supplied in the creative options are in alignment with the WCG Brand.

3.3 In order to deliver the Systems Coaching Programme identified above (as and when required by the WCG), the following resource roles have been identified as potentially being required to fulfil the WCG's needs (subject to the availability of funds and depending on the needs of the WCG):

- Systems Coaches with a minimum of 10 years' experience in executive systems coaching in both private and public sector (see detail table in paragraph 3.5 below).

3.4 The number of resources required and the deliverables according to paragraph 3.1 will be determined on a project-by-project basis in line with the available budget, business requirements and applicable timeframes. The purpose of the contract contemplated herein is to provide scalability to respond to business demands both up and down. **Resources will be appointed for a specific period as determined by the project plan.** All changes of requirements for resources and services, with relevant timeframes, are to be recorded in writing and agreed by both parties.

### 3.5 Skills Requirement/Experience

3.5.1. The below table provides a description of each resource role identified above and sets out the minimum standards and experience required of resources to fulfil the resource roles described.

Role Description	Minimum Standards and Experience
<p><b>Programme Lead</b></p> <ul style="list-style-type: none"> <li>- Able to lead broad, complex teams</li> <li>- Is widely recognized for demonstrated expertise, and substantial achievements in the fields of specialization.</li> <li>- Manage a team of Systems Coaches</li> <li>- Create inception plan and report</li> <li>- Analyse, brief and plan Systems Coaching</li> <li>- Liaise with OD Team and Leadership</li> <li>- Manages project deliverable execution</li> <li>- Responsible for implementation and milestone reporting on deliverables.</li> <li>- Manage administrative and logistical requirements of project implementation i.e. Dates for individual and group sessions, submission of deliverables, project meetings.</li> </ul>	<p>A minimum of 10 years executive management development and/or culture transformation in private (Blue chip, Corporate CEO) or public sector (Top management – Chief Director to Head of Departments, Head of ministry, Members of parliament).</p> <p>And</p> <p>A minimum of 5 years' Project management experience.</p> <p>And</p> <p>A minimum of 1 years' experience of applying systems thinking methodology within leadership development or system change.</p> <p>And</p> <p>Valid certification in Enneagram.</p>

## Systems Coaches

- Provide Leadership group sessions to engage on findings and way forward.
- Provide One-on-one sessions with leadership.
- Conduct observation sessions of leadership in context.
- Generate individual reports.
- Generate system report.
- Provide Team Coaching.
- Generate Action Plans to facilitate behavioural change.
- Provide support to implement action plans for Behavioural change.

A minimum of 5 years executive management development and/or culture transformation in private (Blue chip Corporate CEO) or public sector (Top management – Chief Director to Head of Departments, Head of ministry, Members of parliament).

And

A minimum of 10 years' experience in executive systems coaching in both private and/or public sector.

And

MCC registered or NQF level 9 master's degree required in the following: Leadership Coaching/Business and Development Coaching/Management Coaching/Coaching, Emotional Intelligence and Neuro-Linguistic Programme, to ensure technical competence and level of technical engagement.

And

Membership with Professional Coaching body (e.g. Coaches and mentors of South Africa (COMENSA), The Coaching Education and Training Association of South Africa (CETASA/CTASA), International Coach Federation (ICF) affiliated with a coaching practice/institute registered and accredited by the Services SETA; and/or, International authority International Association of coaching, European Mentoring and Coaching Council).

And

A minimum of 3 years' experience of applying Emotional Intelligence methodology.

And



Role Description	Minimum Standards and Experience
	<p>A minimum of 2 years' experience of applying Neuro/ Brain functioning theory in leadership development.</p> <p>And</p> <p>A minimum of 1 years' experience of applying systems thinking methodology within leadership development or system change.</p> <p>And</p> <p>Valid certification in Enneagram.</p>

### 3.6. Operating Hours

3.6.1. The coaches should be available from 07:00 until 22:00 Monday to Friday. There may be requests to operate from 08:00 until 12:00 on Saturdays. Cabinet, PTM and SMS members do not have fixed working hours and resources would need to avail themselves according to the schedules of the Leadership component. Actual operating hours and scheduling are adjusted according to business demands.

## 4. Phase 1(a): Compulsory Conditions of Bid

- 4.1. Refer to section 5 and the Annexure C for an explanation of the Bid Evaluation process, submission instructions, and a checklist of the required documents to be included in any submission.
- 4.2. Each bidder must indicate with an "X" in **Table 1** below whether it complies with the compulsory conditions of the bid (to the extent that these are applicable to the bidder). Bid documentation must be supported with the relevant evidence set out for each of the requirements indicated in **Table 1** below. In the event that a bidder fails to indicate with an "X" whether it complies with the compulsory conditions of the bid set out in **Table 1** below, it will be assumed, unless the bid documents indicate otherwise, that the bidder does not comply with the compulsory conditions of the bid set out in **Table 1** below. Unless otherwise indicated in Table 1 below, any bidder that does not comply with the compulsory conditions of bid applicable to its bid, and/or **any bidder that does not provide**

the evidence requested below in respect of its bid, will not proceed to the evaluation phase of this tender process.

**Table 1: Compulsory Conditions of Bid**

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
4.2.1	Each bidder must be <b>duly registered on the Central Supplier Database (CSD)</b> . DotP shall verify such registration prior to evaluation of each bid. <b>CSD report to be attached.</b>			
4.2.2	Each bid must contain a duly completed and signed <b>WCBD 1 form (Invitation to Bid form)</b> . All information and documentation requested in the form must be provided. No WCBD 1 forms (including all information and documentation required in terms thereof) will be accepted after the closing date and time of the bid. The WCBD 1 form (including all information and documentation required in terms thereof) must be included in the envelope containing the bidder's Bid Proposal.			
4.2.3	Each bid must contain a duly completed and signed <b>WCBD 4 form (Declaration of Interest, Declaration of Bidder's Past Supply Chain Management Practices and Certificate of Independent Bid Determination)</b> . All information and documentation requested in such form must be provided. No WCBD 4 form (including all information and documentation required in terms thereof) will be accepted after the closing date and time for the submissions of bids. The WCBD 4 form (including all information and documentation required in terms thereof) must be included in the envelope containing the bidder's Bid Proposal.			
4.2.4	Where the bidder intends to claim preferential procurement points for <b>B-BBEE</b> , each bid must contain a duly completed and signed <b>WCBD 6.1 form (Preference Points Claim Form in terms of the Preferential Procurement Regulations 2017)</b> . In such case, all information and documentation requested in such form must be provided. No WCBD 6.1 form (including all information and documentation required in terms thereof) will be accepted after the closing date and time for the submission of bids. The WCBD 6.1 form (including all information and documentation required in terms thereof) must be included in the envelope containing the bidder's Bid Proposal. In the event that a bidder does not submit a duly completed WCBD 6.1 form (including all information and documentation required in terms thereof), the bidder will not for this reason alone be disqualified from having its bid evaluated but it will be assumed that the bidder does not intend to claim any preferential procurement points for B-BBEE.			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
4.2.5	<p><b>Where applicable</b>, any bid submitted by a <b>consortium or joint venture</b> of two or more firms must be accompanied by a copy of the consortium formation document or joint venture agreement, as applicable, which sets forth the precise responsibilities of each of the parties thereto. Consortia and joint venture members are advised that each member will be held jointly and severally liable for the performance of the consortium or joint venture in terms of the contract contemplated herein. Where a bid is submitted by a consortium or joint venture of two or more firms, please ensure that:</p> <ul style="list-style-type: none"> <li>• The joint venture agreement or consortium formation document submitted as part of the bid makes it unambiguously clear that the arrangement between the member firms is either a joint venture or a consortium (as the case may be) and is not a sub-contracting arrangement; and</li> <li>• All standard bidding forms (i.e. WCBD 1, WCBD 4 and WCBD 6.1) are completed in respect of <b>each</b> member firm.</li> <li>• <b>A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate for every separate tender.</b></li> </ul> <p>Failure by a group of member firms to adhere to these requirements shall disqualify the bid submitted by such member firms.</p> <p>No copies of a consortium formation document or joint venture agreement will be accepted after the closing date and time of the bid.</p> <p>The WCG reserves the right to request a preferred bidder that is a consortium or joint venture to provide the following prior to the making of the award: (a) a certified copy of such document or agreement duly certified by a Commissioner of Oaths (where the consortium or joint venture is based in South Africa); or (b) an authenticated copy of such document or agreement duly authenticated by a Notary Public (where the consortium or joint venture is based outside of South Africa).</p> <p>Failure by a preferred bidder to provide same within a period stipulated by the WCG shall disqualify the bid submitted by that preferred bidder.</p> <p>All WCBD forms provided by a consortium or joint venture must be completed in a manner that makes it clear that the bidder is a consortium or joint venture. The WCG reserves the right to request clarity in this regard on the WCBD forms provided by a consortium or joint venture.</p>			

No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
4.2.6	<p>Each bid must contain a list of resources that conforms in all material respects to the resource matrix set out in <b>Annexure D</b> and that is responsive to the requirements set out herein. All resources required to deliver the required services as per the scope of service and deliverables set out in section 3.5 above must be listed in <b>Annexure D</b>.</p> <p>To demonstrate the bidder's capability to start from day 1, please supply the following numbers of Curricula Vitae (CV) per role. CVs should be clear and meet the relevant minimum criteria detailed in section 3.5.</p> <p>The resource quantities below are the minimum number of resources required per resource role for evaluation and adjudication purposes only and represent a typical mix of resources in a team. Actual resource quantities required are unknown and subject to actual WCG demand, and the bidder should not infer any minimum number of resources to be provided.</p> <p>1 x Programme Lead 12 x Systems Coaches</p>			
4.2.7	<p>To demonstrate the bidder's agreement with the Conditions of Contract, each bidder must submit a duly completed and signed <b>Table 2: Conditions of Contract</b>. Compliance with this requirement will be assessed under Phase 1(b) of the evaluation process. The duly completed and signed Table 2 must be included in the Bid Proposal (Envelope 1) referred to above. See section 5.1</p>			
4.2.8	<p>Each bid must include a <b>second envelope</b>, separate to the Bid proposal (Envelope 1), in which the bidder's financial proposal must be sealed. The bidder's financial proposal will only be evaluated as part of <b>Phase 2</b>. The bidder's financial proposal must be sealed in an envelope that adheres to the following requirements:</p> <p>The envelope must be marked with the name of the bidder and entitled: "Financial Proposal: Bid Number FMA 0006-2022/23"; and</p> <p>The envelope must contain a duly completed and signed WCBD 3.3 form (pricing schedule) in the format attached hereto.</p> <p><b>Should a bidder fail to include its financial proposal in a separate envelope, the bidder shall be disqualified from having its bid evaluated further.</b></p>			



No	Compulsory Conditions of Bid	Compliance		
		Comply	Do Not Comply	Not Applicable
4.2.9	<p>A <b>Business Profile</b> must be provided that indicates <b>the nature and the scope of work performed by the bidder</b>, as well as industry experience in rendering the relevant service/s where interest was expressed.</p> <p>Please include a <b>portfolio of evidence containing examples</b> of previous work done (e.g., Executive development, culture transformation work, executive coaching programme executed); and the e-learning platform utilised.</p> <p>For the e-learning platform please include screen shots and descriptions of the e-learning platform functionality and benefits</p> <p>Requirements for bidding company:</p> <ul style="list-style-type: none"> <li>A minimum of 4 years' experience of working with government.</li> </ul>			
4.2.10	<p>The bidder must <b>provide a minimum of three (3) reference</b> letters on a company letterhead that the WCG will utilise to verify previous work done on similar programmes. Information to include for references are the following: Registered name of Organisation, Type of Organisation, Type of service received from Service Provider, Full name of contact person, telephone number and email address.</p> <p><b>This information must be provided on either a reference letter from the company where previous work was performed or a sworn affidavit. See Annexure F</b></p>			
4.2.11	<p>The bidder must provide a clear articulation of intentional change model or theory of change to indicate how they use coaching for culture transformation and achieving behaviour change.</p> <p>The Theory of Change is a tool that helps explain the relationship between a development problem being addressed and the strategies used to address it, showing why and how change takes place.</p> <p>A Theory of Change can come in many different formats, but commonly involves a diagram containing boxes and arrows laid out to show how elements fit together, and why this arrangement should work.</p> <p>In your intentional change model or theory of change, describe how the System coaching activities would lead to the long term outcome of 'Leadership role modeling culture' which would in part drive the final impact envisioned which is "Culture Transformation to being Citizen Centric"</p>			

4.3. Please note that each bidder, by submitting its bid, hereby confirms that it has the **necessary consent of each resource to provide any of his or her personal information as included as part of such bid**. The reference to "personal information" in this section shall mean "personal information" as defined in the Protection of Personal Information Act, 2013 (Act 4 of 2013). Where the personal information of a resource may not be disclosed at the bidding stage of the tender in question, a bidder may de-identify any information and documentation provided in its bid that constitutes personal information of that resource by doing the following:

- Allocating a pseudonym for the first name and surname of the resource in question (indicating in the bid documents that such first name and surname are pseudonyms);
- Removing personal information concerning the resource in question from the CV provided for that resource; and
- Always ensuring that the information and documentation provided as part of the bid are sufficient for the WCG to evaluate that bid in line with the requirements set out in these Terms of Reference.

4.4. The WCG reserves its right to conduct a due diligence check to verify any material aspect of a bidder's bid prior to the award of the tender.

## **5. Phase 1 (b) Conditions of Contract**

5.1. Each bidder must indicate with an "X" in **Table 2** below if it agrees with the following conditions of contract. **Each bidder must include in its bid a signed and completed copy of Table 2 below (i.e. a completed copy of Table 2 with a signature of an authorised representative of the bidder on each page comprising Table 2).** In the event that a bidder does not or fails to indicate with an "X" whether it agrees with a particular condition of contract set out in Table 2 below, it will be assumed, unless the bid documents otherwise, that the bidder does not agree to the condition of contract concerned. **Failure on the part of a bidder to agree to all conditions of contract set out in Table 2 below and to submit as part of its bid proof of its agreement in this regard will lead to disqualification of that bidder's bid.** In the event that a bidder submits a completed but unsigned copy of Table 2, the Department reserves the right to verify with that bidder whether the completed Table 2 was in fact completed by the said bidder (which verification shall be deemed sufficient in lieu of a signed copy of Table 2). References, in Table 2 below, to Service Provider shall be deemed to be a reference to the bidder.

**Table 2: Conditions of Contract**

No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.1	The Service Provider must provide for the full scope of services outlined in section 3.		
5.1.2	The Service Provider must provide the required services as soon as the award has been made, and for thirty-six months thereafter, and within the timeframes agreed to between the Service Provider and WCG.		
5.1.3	The Service Provider must, at all times during the term of the contract, comply with and work within all legislation, regulations, policies and frameworks applicable to the WCG (including, but not limited to, the Minimum Information Security Standards (MISS), the Public Finance Management Act (PFMA), the Protection of Personal Information Act (POPIA), and the Promotion of Access to Information Act (PAIA)). The cost of compliance with such legislation, regulations, policies and frameworks must be included in the agreed resource rates.		
5.1.4	<p>The Service Provider shall be bound by the General Conditions of Contract issued by the National Treasury ("the GCC"), read with the terms and conditions set out herein and to the exclusion of any standard terms and conditions that the Service Provider would ordinarily impose on its clients.</p> <p>Any terms and conditions that are not included herein or in the GCC but which the Service Provider requires to be included in the contract between it and the WCG may, with the agreement of the WCG, be included in the Service Level Agreement referred to below.</p>		
5.1.5	The Service Provider must adhere to all WCG governance and compliance policies and processes.		
5.1.6	The Service Provider must ensure confidentiality in respect of all services rendered to the WCG within and after contract completion. To this end, the Service Provider, together with its resources who are designated to provide the required services contemplated herein, must sign a confidentiality and non-disclosure agreement, as well as complete and submit a declaration of interest on commencement of the services and annually thereafter, as provided by the WCG. Should changes in conflict of interest occur during a year, such changes must be declared immediately.		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

\_\_\_\_\_



No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.7	The resources should be available when so requested from the Department for face-to-face engagements within 24hrs, during the operating hours set out in clause 3.6.1 above, at the expense of the Service Provider		
5.1.8	The Service Provider's resources may be subjected to vetting and security clearances by the State Security Agency, where required (to be arranged by the WCG).		
5.1.9	The Service Provider must negotiate in good faith and enter into a Service Level Agreement (SLA) with WCG within three month of date of appointment, which Service Level Agreement shall, subject to the terms and conditions set out herein, specify agreed key performance indicators, along with an indication on how the Service Provider's performance in terms of the said contract will be monitored, assessed, measured, reported on and discussed at regular scheduled meetings. The Service Level Agreement may be reviewed where necessary and appropriate.		
5.1.10	<p>WCG shall review the Service Provider's performance in terms of the said contract in line with the SLA concluded between WCG and the Service Provider, read with the terms and conditions set out herein. The Performance Management review will include but is not limited to the following factors:</p> <p>1) Contract Management and Administration</p> <p>a. Attendance at 90% of all contract management meetings scheduled monthly or as required</p> <p>b. Timely submission of correct invoices on a monthly basis, with relevant supporting documents including but not limited to time sheets / attendance registers</p> <p>2) Contract Delivery</p> <p>a. Ability to provide the relevant resources, meeting the minimum requirements as specified in section 3.5, at the quantities requested and within the agreed timeframes</p>		

**The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:**

**Bidder Name:** \_\_\_\_\_

**Signature of Authorised Representative of the Bidder:**

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No	Conditions of Contract	Agreement to Conditions	
		Agree	Do Not Agree
5.1.11	<b>Scalability of Resources</b> The WCG reserves the right to increase or decrease the number of resources required in line with actual operational demand. A minimum period of 28 calendar days' notice will be given for increases in resourcing levels. A minimum period of 14 calendar days' notice will be given for decreases in resourcing levels.		
5.1.12	In the event that the Service Provider is a consortium or joint venture, each member of such consortium or joint venture (as the case may be) shall be held jointly and severally liable for the performance of the consortium or joint venture in terms of the contract contemplated herein.		
5.1.13	The services contemplated herein shall be provided subject to the availability of funds, depending on the needs and operational requirements of the WCG and only in accordance with the terms and conditions set out above. There is therefore no guarantee provided by WCG on the volume of services it will request during the term of the contract contemplated herein.		
5.1.14	The WCG reserves the right to terminate the contract contemplated herein or any part thereof at its discretion for any reason whatsoever upon 3 (three) months' written notice to the Service Provider concerned.		
5.1.15	The bidder must accept the terms and conditions as presented by the WCG.		

The following bidder hereby accepts the conditions of contract as indicated on this page as being agreed:

Bidder Name: \_\_\_\_\_

Signature of Authorised Representative of the Bidder:

\_\_\_\_\_

- 5.2 Pricing:
- 5.2.1 Bidders must take note of the following:
- Each bid must contain a quote for the required services, which must be provided on and, in the format, set out in the **WCBD 3.3 form (Pricing Schedule)** attached hereto.
- 5.2.2 Note that the number and nature of requests that will be made by WCG are dependent upon and subject to the available budget, requirements and written approval of the WCG. No commitments or guarantees are placed on the number and nature of requests that will be made by WCG for the provision of services contemplated herein.
- 5.2.3 It is to be noted that the Western Cape Government financial year runs from 01 April – 31 March.
- 5.2.4 All amounts quoted must include VAT and will therefore be deemed to be VAT inclusive.
- 5.2.5 Subject to the terms and conditions set out herein, the all-inclusive amounts quoted in the WCBD 3.3 form (Pricing Schedule) per line item may be increased annually for Years 2-3 on the anniversary of the commencement date of the relevant contract at an amount not more than the applicable official Consumer Price Index (CPIX) rate determined by Statistics South Africa for the relevant anniversary month. The successful bidder will have to apply for this increase on an annual basis, as it is subject to the prior written approval of the Western Cape Government.

### 5.3 Bid Evaluation

5.3.1 Please note that a two-envelope system will be utilised for this tender.

5.3.2 The **first envelope** must contain the **Bid Proposal**.

5.3.3 The **second envelope** must contain the **Financial Proposal** in the form of a duly completed and signed WCBD 3.3 (pricing schedule) attached hereto.

5.3.4 This bid will be evaluated in 2 phases as follows:

5.3.5 **Phase 1** – (a) Compliance to Compulsory Conditions of the bid and (b) Agreement to Conditions of Contract.

5.3.5.1 Strict compliance to all Compulsory Conditions of the bid will be checked as part of Phase 1 (a) and agreement to all Conditions of Contract will be checked as part of Phase 1 (b). Bidders who do not comply with all compulsory bid conditions and/or do not agree to all the Conditions of Contract will not proceed to Phase 2 of the evaluation phase of this bid.

5.3.5.2 Compliance for the purposes of Phase 1 (a) and Phase 1 (b) will be checked using the **checklist** provided in **Annexure C** Table C1. DotP prefers that bidders complete and submit this checklist as part of their bids to ensure that compliance with the requirements applicable to Phase 1 (a) and Phase 1 (b) can be checked easily.

5.3.6 **Phase 2** – Application of price and preference points

5.3.6.1 All acceptable bids will compete on price and B-BBEE compliance. Allocation of points for price and B-BBEE contribution level status shall be done in accordance with the applicable provisions of the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), read with the Preferential Procurement Regulations, 2017.

5.3.6.2 The following breakdown and weighting will apply:

**Table 3**

No	BREAKDOWN	Points
1.	PPPFA / B-BBEE scoring	20
2.	Price	80
	<b>Total</b>	<b>100</b>

5.3.6.3 A bid not containing a completed pricing schedule that conforms in all material respects to the format set out in the WCBD 3.3 form attached hereto, read with section 5 above, shall not be eligible for evaluation under Phase 2. A unit price must be provided for each line item, failing which it will be assumed that the bidder is unable to provide the services not priced for.

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5.4 As indicated above, DotP reserves the right not to award any contract contemplated herein.

**5.5 Important information to Service Providers:**

5.5.1 The procuring department reserves the right to negotiate with the following categories of bidders prior to the award of the tender contemplated herein, but within the applicable Bid validity period:

5.5.2 Bidders that have been identified as preferred bidders through a competitive or limited bidding process, but the bids of which are not market-related, provided that any negotiations entered into with such preferred bidders (i) not substantially alter the original specifications / terms of reference, the compulsory bid conditions, and/or the relevance of the Bid evaluation process; and (ii) the exercise of such right shall not allow the bidder(s) concerned an unfair advantage over other bidders and shall not be to the detriment of such other bidders; or

5.5.3 A bidder that is the only preferred bidder in the circumstances (i.e., either a sole or single source bidder or the only bidder to have proceeded to the final evaluation phase of a competitive or limited bidding process) where the bidder's quote is not market-related or the acceptance of the bidder's bid by the procuring department is conditional upon market-related tariffs or rates being negotiated and agreed between the procuring department and the bidder concerned.

## **Annexure C: Summary of Documentation Required**

Refer to section 5 for an explanation of the Bid Evaluation process.

This annexure contains submission instructions and a checklist of the required documents to be included in the submission.

### **A.1 Submission Instructions**

Please note that a two-envelope system will be utilised for this tender.

**Envelope One** contains the **Bid Proposal** which must be sealed in an envelope marked with the name of the bidder and entitled: "Bid Proposal: Bid Number [Insert bid number]".

- 1) The Bid Proposal envelope should contain the documents mentioned in section A2 below.

Each bid must include a second envelope separate to the Bid Proposal.

**Envelope Two** contains the **Financial Proposal** which must be sealed in an envelope marked with the name of the bidder and entitled: "Financial Proposal: Bid Number [Insert bid number]".

- 1) The bidder's financial proposal will only be evaluated as part of Phase 2.
- 2) The Financial Proposal envelope must contain a duly completed and signed WCBD 3.3 form (pricing schedule) in the format attached hereto.

### **A.2 Documents required with Bid Proposal in First Envelope**

The First Envelope must contain the information in Table C1 following.

Please provide all the information as a single stack of pages numbered sequentially from 1.

Printout Table 1 and Table 2 and complete columns 5 and 6 (*Submitted* and *Page No*) and include as a cover to your submission.

Note that the *Page No* (F) refers to the page number in your Bid Proposal. The *TOR Ref* column (D) refers to the section within this Bid Specification document.

**TABLE C1: Documents required in First Envelope: Bid Proposal**

(A)	(B)	(C)	(D)	(E)	(F)
#	TABLE C1:	Nature of evidence	TOR Ref	Submitted Y/N	Page No
1	Copy of Table C1 Checklist	Copy of this <b>Table C1</b> with columns (E) and (F) completed – Submitted and Page No.	Annexure C		
2	Copy of Table 1	We prefer that you submit a copy of Table 1 indicating Compliance / Non-Compliance / Not Applicable.	4.2		
3	Proof of registration of CSD	Proof of registration on Central Supplier Database	4.2.1		
4	WCBD 1	Duly completed and signed <b>WCBD 1</b> form	4.2.2		
5	WCBD 4 if applicable	Duly completed and signed <b>WCBD 4</b> form	4.2.3		
6	WCBD 6.1 if applicable	Where the bidder intends to claim preferential procurement points for B-BBEE, each bid must contain a duly completed and signed <b>WCBD 6.1</b> form	4.2.4		
7	Consortium if applicable	Where bidder is a consortium or joint venture of two or more firms, submission of a copy of the consortium formation document or joint venture agreement, as applicable, which sets forth the precise responsibilities of each of the parties thereto. The joint venture agreement or consortium formation document submitted as part of the bid must make it unambiguously clear that the arrangement between the member firms is either a joint venture or a consortium (as the case may be) and is not a sub-contracting arrangement. <b>All standard bidding forms (i.e., WCBD 1, WCBD 4 and WCBD 6.1) must be completed in respect of each member firm. A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate for every separate tender.</b>	4.2.5		

(A)	(B)	(C)	(D)	(E)	(F)
#	TABLE C1:	Nature of evidence	TOR Ref	Submitted Y/N	Page No
8	<b>Annexure D</b> Resource Matrix and CVs	<p>To demonstrate the bidder's capability to start from day 1, please supply the following CVs per role. CVs should be no more than four pages long and clearly meet the relevant minimum criteria detailed in section 3.5.</p> <p>The resource quantities below are the minimum number of resources required per resource role for evaluation and adjudication purposes only and represent a typical mix of resources in a team. Actual resource quantities required are unknown and subject to actual WCG demand, and the bidder should not infer any minimum number of resources to be provided.</p> <ul style="list-style-type: none"> <li>• 1 x Programme Lead</li> <li>• 12 x Systems Coaches</li> </ul>	4.2.6 and Annexure D		
9	Copy of Table 2	Submission of a duly completed and signed copy of Table 2 under section 5 of the Terms of Reference indicating acceptance of all <i>Conditions of Contract</i> set out therein. i.e. sign the block at the bottom of each page of <b>Table 2</b>	4.2.7 and 5		
10	Business profile	<p>A <b>Business Profile</b> must be provided that indicates <b>the nature and the scope of work performed by the bidder</b>, as well as industry experience in rendering the relevant service/s where interest was expressed.</p> <p>Please include a <b>portfolio of evidence containing examples</b> of previous work done (e.g. Executive development, culture transformation work, executive coaching programme executed) and the e-learning platform being utilised.</p> <p>Requirements for bidding company</p> <ul style="list-style-type: none"> <li>• A minimum of 4 years' experience of working with government.</li> </ul>	4.2.9		
11	Contactable References	The bidder must <b>provide a minimum of three (3) contactable reference letters or sworn affidavits</b> that the WCG will utilise to verify previous work done on the relevant service/s.	4.2.10		
12	Theory of Change	The bidder must provide a clear articulation of intentional change model or theory of change to indicate how they use coaching for culture transformation.	4.2.10		



TABLE C2: Documents required in Second Envelope: Financial Proposal

(A)	(B)	(C)	(D)	(E)
#	TABLE C2:	Nature of evidence	TOR Ref	Submitted Y/N
1	Financial proposal: WCBD 3.3	Submission of the Financial Proposal ( <b>WCBD 3.3</b> ) must be sealed in an envelope	4.2.8 and Pricing schedule in 5	

**Annexure D: Resource Matrix (note: more rows can be added if required)**

[illegible]

**Note:** Years of experience for the relevant role, must be clearly identifiable in the CV to confirm the summary of the information provided in Annexure

**ANNEXURE E: CONTACTABLE REFERENCES LIST (note: more rows can be added if required)**

No	Registered Name of Enterprise / Organisation	Type of organisation (Private or Public)	Type of Service rendered	Full name of Contact Person	Telephone Number	Email Address	Reference Number of Reference letter or Sworn Affidavit
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							

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ANNEXURE F: SWORN AFFIDAVIT

AFFIDAVIT

TO BE COMPLETED BY A DULY AUTHORISED REPRESENTATIVE OF THE BIDDER FOR EACH CONTACTABLE REFERENCE CITED IN ANNEXURE E THAT  
CANNOT OR DOES NOT PROVIDE A REFERENCE LETTER

*[Please ensure this affidavit is completed in full. Each page must be initialed or signed (where indicated) by the deponent and the Commissioner of Oaths.]*

I, \_\_\_\_\_ (full name of an authorised representative of the bidder), with identity /  
Passport Number \_\_\_\_\_, do hereby swear / solemnly and sincerely affirm and declare the following:

1. I am duly authorised to depose to this affidavit for and on behalf of \_\_\_\_\_ (registered name of  
the bidder) with registration number \_\_\_\_\_ (registration number) ("the Bidder");
2. The Bidder has undertaken the following projects.....  
for \_\_\_\_\_ (registered name of bidder's client) ("the Enterprise /  
Organisation").
3. Further information regarding the projects listed above and the services provided by the Bidder to the Enterprise / Organisation in  
relation thereto may be obtained from the following contact person (who has been designated such purpose by the Enterprise /  
Organisation):

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Name: \_\_\_\_\_

Designation: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

4. The information set out above is accurate, up-to-date and correct in all aspects.

\_\_\_\_\_  
**Signature of Bidders Representative**

Full name of Bidders Representative: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_  
Identity / Passport Number of Bidders Representative: \_\_\_\_\_

I hereby certify that:

1. The deponent acknowledged to me that:

1.1 He / she knows and understands the contents of this affidavit;

1.2 He / she has no objection to taking the prescribed oath / making the prescribed affirmation (please delete whichever is not applicable);

1.3 He / she considers the prescribed oath / affirmation (please delete whichever is not applicable) to be binding on his / her conscience;

2. The deponent thereafter uttered the words:

2.1 "I swear that the contents of this affidavit are true, so help me God" (where he / she took the prescribed oath); or

2.2 "I solemnly and sincerely affirm that the contents of the affidavit are true: (where he / she took the prescribed affirmation); (as the case may be); and

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3. The deponent signed this affidavit in my presence at the address set out hereunder on the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

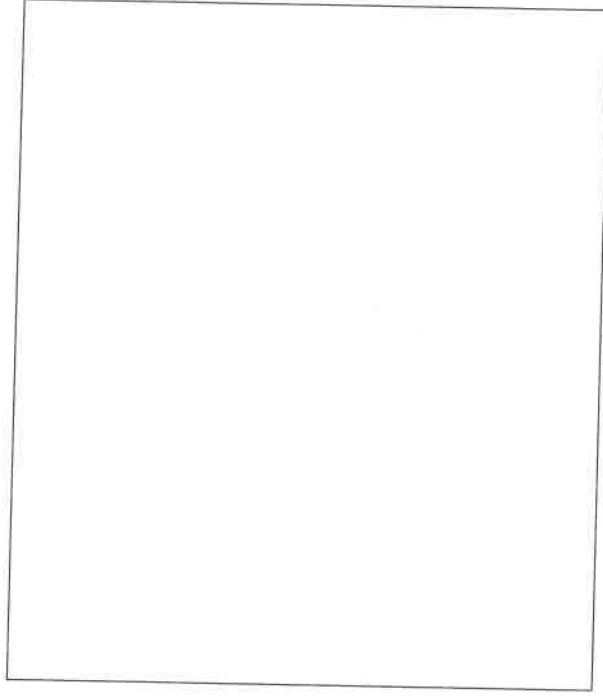
**Commissioner of Oaths**

Full names:

Designation:

Address:

Commissioner of Oaths  
stamp:



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