

## REQUEST FOR QUOTATION OF GOODS AND SERVICES

**DESCRIPTION: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT EMPLOYEE CLIMATE SURVEY AT THE SADPMR FOR A PERIOD OF 36 MONTHS**

**RFQ NO:16/03/2023**

Kindly furnish us with a written quotation as detailed in the enclosed schedule.

The quotation must be submitted on the letterhead of your business and submitted not later than **23 March 2023 @ 11h00 AM to email address: [quotations@sadpmr.co.za](mailto:quotations@sadpmr.co.za)**

### The following conditions will apply:

- 1) Price(s) quoted must be valid for at least thirty (30) days from date of your offer.
- 2) Price(s) quoted must be firm and inclusive of VAT.
- 3) A firm delivery period must be indicated.
- 4) These quotations will be evaluated in terms of Preferential Procurement Regulations, 2022:  
**80 points for price**  
**20 points for specific goals as follows:**
  - Enterprise owned by Black people – 5 points
  - Enterprise owned by Black women – 5 points
  - Enterprise owned by youth – 5 points
  - Small, medium and Micro Enterprise – 5 points
- 5) Only bidders registered on the central supplier database (CSD) and with a CSD number will be considered for this tender, as this is a requirement from the National Treasury.
- 6) Late responses will not be considered.

#### ISSUED BY:

**THE CHIEF EXECUTIVE OFFICER  
SOUTH AFRICAN DIAMOND AND  
PRECIOUS METALS REGULATOR  
P.O. BOX 16001  
DOORFONTEIN  
2028**

**Tel: (011) 223 7000  
Fax: (011) 334 8898**

#### CONTACT PERSON (SPECIFICATION)

**Ms. Cynthia Khadiamovha**

**E-mail:**  
[cynthiak@sadpmr.co.za](mailto:cynthiak@sadpmr.co.za)

#### CONTACT PERSON (ADMINISTRATION)

**Ms. Shalati Mabunda**

**E-mail**  
[shalatim@sadpmr.co.za](mailto:shalatim@sadpmr.co.za)

## **Content**

| <b>NO.</b>                                       | <b>Page</b>    |
|--------------------------------------------------|----------------|
| <b>1. INVITATION OF BIDS (SBD 1)</b>             | <b>3 – 4</b>   |
| <b>2. TERMS OF REFERENCE</b>                     | <b>5 - 7</b>   |
| <b>3. DECLARATION OF INTEREST (SBD 4)</b>        | <b>8 - 10</b>  |
| <b>4. PREFERENCE POINTS CLAIM FORM (SBD 6.1)</b> | <b>11 – 15</b> |

**PART A****INVITATION TO BID**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)**

|             |                      |               |                      |               |              |
|-------------|----------------------|---------------|----------------------|---------------|--------------|
| BID NUMBER: | <b>RFQ16/03/2023</b> | CLOSING DATE: | <b>23 March 2023</b> | CLOSING TIME: | <b>11:00</b> |
|-------------|----------------------|---------------|----------------------|---------------|--------------|

|             |                                                                                                                      |
|-------------|----------------------------------------------------------------------------------------------------------------------|
| DESCRIPTION | <b>APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT EMPLOYEE CLIMATE SURVEY AT THE SADPMR FOR A PERIOD OF 36 MONTHS.</b> |
|-------------|----------------------------------------------------------------------------------------------------------------------|

**BID RESPONSE DOCUMENTS SHOULD BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

**RESPONSES SHOULD BE EMAILED TO [quotations@sadpmr.co.za](mailto:quotations@sadpmr.co.za)**

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO**

**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

|                  |                                                                  |                  |                                                                  |
|------------------|------------------------------------------------------------------|------------------|------------------------------------------------------------------|
| CONTACT PERSON   | <b>C Khadiamovha</b>                                             | CONTACT PEOPLE   | <b>S Mabunda</b>                                                 |
| TELEPHONE NUMBER | <b>(011) 223 7000</b>                                            | TELEPHONE NUMBER | <b>(011) 223 7000</b>                                            |
| FACSIMILE NUMBER |                                                                  | FACSIMILE NUMBER |                                                                  |
| E-MAIL ADDRESS   | <a href="mailto:cynthiak@sadpmr.co.za">cynthiak@sadpmr.co.za</a> | E-MAIL ADDRESS   | <a href="mailto:shalatim@sadpmr.co.za">shalatim@sadpmr.co.za</a> |

**SUPPLIER INFORMATION**

|                         |      |  |        |  |
|-------------------------|------|--|--------|--|
| NAME OF BIDDER          |      |  |        |  |
| POSTAL ADDRESS          |      |  |        |  |
| STREET ADDRESS          |      |  |        |  |
| TELEPHONE NUMBER        | CODE |  | NUMBER |  |
| CELLPHONE NUMBER        |      |  |        |  |
| FACSIMILE NUMBER        | CODE |  | NUMBER |  |
| E-MAIL ADDRESS          |      |  |        |  |
| VAT REGISTRATION NUMBER |      |  |        |  |

|                                                                                                                                                                                                                     |                                                                                               |                                                                          |                                                                                                                  |                               |      |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|-------------------------------|------|
| SUPPLIER COMPLIANCE STATUS                                                                                                                                                                                          | TAX COMPLIANCE SYSTEM PIN:                                                                    |                                                                          | O<br>R                                                                                                           | CENTRAL SUPPLIER DATABASE No: | MAAA |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE                                                                                                                                                                        | TICK APPLICABLE BOX]<br><br><input type="checkbox"/> Yes<br><br><input type="checkbox"/> No   | B-BBEE STATUS SWORN AFFIDAVIT                                            | [TICK APPLICABLE BOX]<br><br><input type="checkbox"/> Yes<br><br><input type="checkbox"/> No                     |                               |      |
| [A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]                                                          |                                                                                               |                                                                          |                                                                                                                  |                               |      |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?                                                                                                                       | <input type="checkbox"/> Yes<br><br><input type="checkbox"/> No<br><br>[IF YES ENCLOSE PROOF] | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes<br><br><input type="checkbox"/> No<br><br>[IF YES, ANSWER THE QUESTIONNAIRE BELOW ] |                               |      |
| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS                                                                                                                                                                          |                                                                                               |                                                                          |                                                                                                                  |                               |      |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO                                                                                            |                                                                                               |                                                                          |                                                                                                                  |                               |      |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO                                                                                                                  |                                                                                               |                                                                          |                                                                                                                  |                               |      |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO                                                                                                 |                                                                                               |                                                                          |                                                                                                                  |                               |      |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO                                                                                                      |                                                                                               |                                                                          |                                                                                                                  |                               |      |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <input type="checkbox"/> YES <input type="checkbox"/> NO                                                                                                  |                                                                                               |                                                                          |                                                                                                                  |                               |      |
| 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

### 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 (SBD7).**

### 2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE [WWW.SARS.GOV.ZA](http://WWW.SARS.GOV.ZA).
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

## TERMS AND CONDITIONS FOR BIDDING

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARSMAY 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:.....

# **TERMS OF REFERENCES FOR CONDUCTING EMPLOYEE CLIMATE SURVEY AT THE SADPMR FOR A PERIOD OF 36 MONTHS**

## **1. INTRODUCTION**

The South African Diamond and Precious Metals (SADPMR) is a Schedule 3A entity of government charged with the mandate of regulating the buying and selling of diamonds and precious metals. The entity operates from Johannesburg with 3 satellite offices located in Kimberley, Cape Town and well as Durban. The SADPMR is one of the entities that reports to Minister of the Department of Mineral Resources and Energy.

## **2. OBJECTIVE**

The SADPMR would like to engage a consultant to undertake a Climate survey in the entity. This is to enable the SADPMR to take stock of what employees think and how they are feeling and assess ways to help increase an employees' sense of inclusion and wellbeing to boost productivity. This Climate Survey is being undertaken to give employees an opportunity to engage with management as a way of contributing towards the SADPMR people strategy as well as a feedback mechanism and enhance management understanding of what is important to the SADPMR's employee.

## **3. SCOPE**

The service provider is expected to carry out an independent comprehensive Climate survey across the SADPMR covering all our offices. The survey will be conducted online and should, among other things, be designed in a manner so as to elicit the feedback of employees on the effectiveness of various Human Resources Management practices/policies, people management, overall organisational leadership, change management processes, values and culture.

The climate survey results should also provide some valuable analysis of responses by demographics such as age, gender, ethnicity and disability. The analysis should also be able to demarcate/segment the data according to different functional/departmental areas and job levels. The service provider should package these results in a way which will enable management to pinpoint areas for priority development.

## **4. DELIVERABLES**

The SADPMR requires the following deliverables:

- a) Survey design and administration, Creation of Survey Questionnaire Format that is repeatable by SADPMR in future years;
- b) Climate Survey Tool;
- c) Together with the SADPMR Strategic Communications department, Design Communication Collateral;
- d) The SADPMR employee should be able to assess at the Line manager level, Cluster level, Divisional level and the SADPMR level with the reports showing such a picture for improvements at each level;
- e) Collating the resulting data in a way that maximises its efficacy and gives the most insight to management;
- f) Survey Report with detailed analysis of the various area of the business. The service provider will arrange for analysis of the survey data and provide survey analysis on various parameters as required by the SADPMR.
- g) The service provider will be required to ensure transfer of skill to the SADPMR's Organisational Effectiveness and Development team;
- h) Prepare a dashboard to track the health of the organisation based on data;
- i) Presentation to the Extended leadership team on the results and implications of the Survey;

- j) Benchmarking on data and practices against results from similar Research, Development and Innovation (RD&I) organizations;
- k) Recommendations to the leadership team on key areas of improvement based on the
- l) Engagement survey results and potential areas of linkage of engagement to the broader talent and the SADPMR strategy;
- n) Recommendations on employee engagement initiatives and ideas; and
- o) Based on the data analysis and survey results, the service provider will present a 6 to 12 months' roadmap of interventions.

## 5. EVALUATION METHODOLOGY / CRITERIA

The evaluation of the project will be in two phases i.e. functionality as well as price.

### 6. PHASE 1: FUNCTIONALITY CRITERIA

| No | Evaluation Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Weighting<br>(%) |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| 1  | <b>Qualification and Experience of Organization and Team:</b> <ul style="list-style-type: none"> <li>Qualifications and experience working with organizations to design custom employee engagement strategies to assess and build a positive employee engagement culture.</li> <li>Experience includes developing, implementing and evaluating engagement tool(s) for organizations that successfully meet the needs of the client organization.</li> <li>Qualifications and experience of lead individual or proposed project team working on projects of a similar nature.</li> </ul> | 30               |
| 2  | <b>Proposed Approach, Engagement Tools and Plan:</b> <ul style="list-style-type: none"> <li>Assessment of the engagement tool(s) and Climate survey approach.</li> <li>Completeness and quality of the proposed approach, work plan and schedule to complete the work including the preparation and launch of the program and</li> </ul>                                                                                                                                                                                                                                                | 50               |

|   |                                                                                                                                                                                                                                                                          |     |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
|   | the framework for evaluating results and creating appropriate report.                                                                                                                                                                                                    |     |
|   | <ul style="list-style-type: none"> <li>Plan to validate and evaluate the employee engagement program.</li> </ul>                                                                                                                                                         |     |
| 3 | <b>New/innovative and value-added approaches to service delivery:</b> <ul style="list-style-type: none"> <li>Vendor to provides post survey support, several modes or sources of data collection and various innovative service delivery approaches.</li> </ul>          | 10  |
| 4 | <b>References:</b> <ul style="list-style-type: none"> <li>The company must have not less than 5 references where employee climate survey assignments were successfully undertakes in organisations of a similar stature/nature to SADPMR, in the past 5 years</li> </ul> | 10  |
|   | TOTAL                                                                                                                                                                                                                                                                    | 100 |

**NB: ONLY BIDDERS OBTAINING 80% OR MORE SHALL PROCEED TO PHASE TWO OF EVALUATION WHICH IS PRICE AND SPECIFIC GOALS.**

Refer to Annexure A for the scoring sheet that will be used to evaluate functionality.

#### Phase 2: Price and Specific Goals

| CRITERIA                        | WEIGHT |
|---------------------------------|--------|
| PROJECT COST                    | 80     |
| B-BBEE STATUS LEVEL CONTRIBUTOR | 20     |

#### MONITORING AND REPORTING

The successful service provider will report directly to SADPMR Human Resources Division

- The HR Division for technical matters
- The SCM Division for terms of contract

#### 7. COMPLETION DATE

This service is required to last 36 months as follows once a year climate survey will be conducted with recommendations.

## **8. BRIEFING SESSION None**

## **9. ENQUIRIES**

In the event where a service provider has enquiries regarding the technical aspects of this project, as well as the link to the virtual meeting/ briefing session, please contact Ms Masingita Nkomo- Fumane at 011 223 7000 or [masingitanf@sadpmr.co.za](mailto:masingitanf@sadpmr.co.za).

## ANNEXURE A

| No | Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Proof required                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Points allocation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Weight |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| 1  | <p><b>Qualification and Company Experience:</b></p> <p>The team must have a demonstrated experience, in successfully managing employee climate survey assignments in organisations similar to the SADPMR (government, private sector or parastatals).</p> <ul style="list-style-type: none"> <li>The team leader must have not less than 5 years' experience in managing employee climate survey assignments. Experience in working with organisations similar in nature to the SADPMR in the past 5 years with successful employee climate survey interventions would be a strong advantage.</li> <li>The survey designer must have not less than 5 years' experience in designing custom employee surveys and should hold a BA Psychometry or equivalent at a minimum.</li> </ul> | <p>CV of survey designer and lead individual explicitly indicating the number of years each has been providing employee climate survey services and to which organisations. Level of experience of leader clearly articulated.</p> <p>Experience to include developing, implementing and evaluating engagement tool(s) for organizations that successfully meet the needs of the client organization.</p> <p>Examples of success stories demonstrating experience and successful outcomes.</p> <p>Qualification(s) of survey designer must be indicated.</p> | <p><b>0 points</b> - survey designer no experience in managing employee climate survey assignments.</p> <p><b>3 points</b> - survey designer has less than five years' experience in managing employee climate survey assignments.</p> <p><b>5-points-</b> survey designer has five – seven years' experience in managing employee climate survey assignments.</p> <p><b>10 points-</b> survey designer has eight - ten years' experience in managing employee climate survey assignments</p> <p><b>0 points</b> – Team leader has no experience in managing employee climate survey assignments.</p> <p><b>3 points</b> – Team leader has less than five years' experience in managing employee climate survey assignments.</p> <p><b>5 points</b> - Team leader has five – seven years' experience in managing employee climate survey assignments.</p> <p><b>10 points</b> - Team leader has eight - ten years' experience in managing employee climate survey assignments.</p> | 30     |

|   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
|   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>0-points</b> - Survey designer is not a qualified Psychometrist or equivalent<br><b>5-points</b> - Survey designer is a qualified Psychometrist or equivalent<br><b>10-points</b> - Survey designer holds a BA Psychometry and higher                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |     |
| 2 | <b>Proposed Approach, Engagement Tools and Plan:-</b><br><br>The service provider must demonstrate their understanding of the key requirements and expectations of SADPMR as outlined in this document. An in-depth understanding of the SADPMR and its role and mandate is required. A detailed approach, methodology and tools on how they will assist SADPMR in achieving the objectives of this request, must be provided, including an outline of the project deliverables, indicating key milestones and turnaround times.<br><br>Detailed costing is critical. | Detailed Methodology, Approach and Gantt Chart/time line<br><br>Methodology to provide for:- <ul style="list-style-type: none"> <li>the engagement tool(s) and Climate survey approach.</li> <li>Completeness and quality of the proposed approach, work plan and schedule to complete the work</li> <li>preparation and launch of the program,</li> <li>the framework for evaluating results and creating appropriate report.</li> <li>Plan to validate and evaluate the employee engagement program</li> </ul> | <b>0 points</b> - Non-submission or proposal does not address the scope of the assignment<br><br><b>5 points</b> - Approach is very generic. The bidder's proposal addresses and meets minimum or basic project requirements. The work plan and timeframes meet the requirements of the assignment; the sequencing of activities indicate the bidder understand the requirements.<br><br><b>7 points</b> - Approach is specifically tailored to suit the SADPMR's employee survey requirements. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities demonstrate that the bidder clearly understand the requirements and has a good understanding of the needs of the SADPMR. | 50% |

|              |                                                                                                                                                                                                                              |                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                      |             |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
|              |                                                                                                                                                                                                                              |                                                                                                                                                                                                | <b>10 points</b> -The approach is innovative and more than exceeds the expectations of the SADPMR. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder has an excellent or demonstrated in-depth understanding of the requirements of the SADPMR. |             |
| 3            | <b>New/innovative and value-added approaches to service delivery</b>                                                                                                                                                         | <ul style="list-style-type: none"> <li>• Vendor to provides post survey support, several modes or sources of data collection and various innovative service delivery approaches.</li> </ul>    | <b>0 points</b> - bidder failed to provides any value add services<br><b>5 points</b> – Proposed value adds meets SADPMR's expectations<br><b>10 points</b> - bidder proposed innovative value adds which more than exceeds the expectations of the SADPMR                                                           | <b>10</b>   |
| 4            | <b>References</b><br><br>The company must have not less than 5 references where employee climate survey assignments were successfully undertakes in organizations of a similar stature/nature to SADPMR, in the past 5 years | Reference Letters, with the following information as a minimum <ul style="list-style-type: none"> <li>• Client</li> <li>• Contact Person</li> <li>• Contact Number</li> <li>• Email</li> </ul> | <b>0 points</b> - < 5 references<br><br><b>5 points</b> - 5 - 6 references<br><br><b>7 points</b> - 7 - 8 references<br><br><b>10 points</b> - >8 references                                                                                                                                                         | <b>10%</b>  |
| <b>Total</b> |                                                                                                                                                                                                                              |                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                      | <b>100%</b> |

**TERMS OF REFERENCES FOR CONDUCTING EMPLOYEE CLIMATE SURVEY AT THE SADPMR FOR A PERIOD OF 36 MONTHS**



**SOUTH AFRICAN DIAMOND AND  
PRECIOUS METALS REGULATOR**

Corner Bonaero Drive and Cote D Azur Avenue  
**Kempton Park 1622, South Africa**

P. O. Box 16001, Doornfontein 2028 – South Africa  
Tel (011) 223 7000 Fax (011) 334-8898  
info@sadpmr.co.za

All correspondence to be addressed: The Chief Executive Officer

**SBD 4**

## **BIDDER'S DISCLOSURE**

### **1. PURPOSE OF THE FORM**

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

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

### **2. Bidder's declaration**

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise,

employed by the state?

**YES/NO**

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

| <b>Full Name</b> | <b>Identity Number</b> | <b>Name of State institution</b> |
|------------------|------------------------|----------------------------------|
|                  |                        |                                  |
|                  |                        |                                  |
|                  |                        |                                  |
|                  |                        |                                  |
|                  |                        |                                  |
|                  |                        |                                  |
|                  |                        |                                  |
|                  |                        |                                  |

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

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

2.2.1 If so, furnish particulars:

.....  
.....

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

2.3.1 If so, furnish particulars:

.....  
.....

### 3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

---

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

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

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

- I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

|           |                |
|-----------|----------------|
| .....     | .....          |
| Signature | Date           |
| .....     | .....          |
| Position  | Name of bidder |

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

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

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

### 1. GENERAL CONDITIONS

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

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

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

The applicable preference point system for this tender is the 80/20 preference point system.

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

- (a) Price; and
- (b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

|                                           | POINTS |
|-------------------------------------------|--------|
| PRICE                                     | 80     |
| SPECIFIC GOALS                            | 20     |
| Total points for Price and SPECIFIC GOALS | 100    |

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

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

## 2. DEFINITIONS

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

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration  
Pmin = Price of lowest acceptable tender

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

Ps = Points scored for price of tender under consideration  
 Pt = Price of tender under consideration  
 Pmax = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

| The specific goals allocated points in terms of this tender | Number of points allocated (90/10 system)<br>(To be completed by the organ of state) | Number of points allocated (80/20 system)<br>(To be completed by the organ of state) | Number of points claimed (90/10 system)<br>(To be completed by the tenderer) | Number of points claimed (80/20 system)<br>(To be completed by the tenderer) |
|-------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| Enterprise owned by Black people                            |                                                                                      | 5                                                                                    |                                                                              |                                                                              |
| Enterprise owned by Black women                             |                                                                                      | 5                                                                                    |                                                                              |                                                                              |

|                                    |  |   |  |  |
|------------------------------------|--|---|--|--|
| Enterprise owned by youth          |  | 5 |  |  |
| Small, medium and Micro Enterprise |  | 5 |  |  |
|                                    |  |   |  |  |
|                                    |  |   |  |  |
|                                    |  |   |  |  |

#### DECLARATION WITH REGARD TO COMPANY/FIRM

- 4.3. Name of company/firm.....
- 4.4. Company registration number: .....
- 4.5. TYPE OF COMPANY/ FIRM
- ☐ Partnership/Joint Venture / Consortium
  - ☐ One-person business/sole propriety
  - ☐ Close corporation
  - ☐ Public Company
  - ☐ Personal Liability Company
  - ☐ (Pty) Limited
  - ☐ Non-Profit Company
  - ☐ State Owned Company
- [TICK APPLICABLE BOX]
- 4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:
- i) The information furnished is true and correct;
  - ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
  - iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
  - iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
    - (a) disqualify the person from the tendering process;
    - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
    - (c) cancel the contract and claim any damages which it has suffered as a result of

having to make less favourable arrangements due to such cancellation;

- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....

**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

.....

.....