REQUEST FOR QUOTATION: INDEPENDENT POST-BAC PROBITY REVIEW OF THE AR PROJECTS ROOF REPAIRS AND MAINTENANCE CONTRACT CHANGE

Reference Number	IZIKO-FIN-RFQ-2026/07/19
Description	Independent post-BAC probity review of the proposed contract change under Tender SS/ROOF REPAIRS AND MAINTENANCE/05/2024 (AR Projects).
Address	25 Queen Victoria Street, Cape Town, 8001
Attention	Noleen Donson
Site Visit	Not Applicable
Issued Date	21 July 2026
Closing date and time for submission	30 July 2026 @ 11:00 am
Method of delivery	Quotes/proposals and all required supporting documents must be emailed to Noleen Donson at ndonson@iziko.org.za and to scm@iziko.org.za.
Technical enquiries	Siphamandla Oupa soupa@iziko.org.za +27 (0) 21 4813889
Name of Company	
CSD Supplier Number (MA number)	
B-BBEE Status Level of Contribution	
Quote Price (Incl Vat)	
Signature	

BIDDER'S DISCLOSURE (SBD4)

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise,

employed by the state? **YES/NO**

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

Full Name	**Identity Number**	**Name of State institution**

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

2.2.1 If so, furnish particulars:

…………………………………………………………………………………

…………………………………………………………………………………

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

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

2.3.1 If so, furnish particulars:

………………………………………………………………………………

………………………………………………………………………………

3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF

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

PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND

COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

………………………………   ..……………………………………………

Signature   Date

………………………………   ………………………………………………

Position   Name of bidder (Company Name)

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

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1. GENERAL CONDITIONS

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

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

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

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

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

(a) Price; and

(b) Specific Goals.

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

The maximum points for this tender are allocated as follows:

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

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

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

2. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20 or **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \text{ or } \qquad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20 or **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \qquad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

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	**Evidence**	**Number of points allocated (80/20 system) (To be completed by the organ of state)**	**Number of points claimed (80/20 system) (To be completed by the tenderer)**
Race: black persons (ownership). Scoring: 50% or more black ownership = 20 points; less than 50% black ownership = 10 points; 0% black ownership = 0 points.	B-BBEE certificate or sworn affidavit (as applicable), company-registration records, identity documents and CSD report.	20	

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number: …………………………………………………………...

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

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

(e) forward the matter for criminal prosecution, if deemed necessary.

………………………………………

SIGNATURE(S) OF TENDERER(S)

NAME OF ORGANISATION: ……………………………………………………

SURNAME AND NAME: ………………………………………………………

DATE: ……………………………………………………….

ADDRESS: ……………………………………………………….

……………………………………………………….

1. BACKGROUND AND ASSIGNMENT

Iziko Museums of South Africa (Iziko) is a Schedule 3A public entity established under the Cultural Institutions Act, 1998. Its procurement and contract-management decisions must comply with the Constitution, the Public Finance Management Act, 1999 (PFMA), Treasury Regulations, the Preferential Procurement Policy Framework Act and Regulations in force on the issue date, applicable National Treasury instructions, applicable CIDB prescripts, Iziko's SCM policy and delegations, and the signed construction contract.

Iziko intends to appoint an independent service provider for one defined, post-BAC probity review of the proposed contract change relating to AR Projects' roof repairs and maintenance contract. The assignment is not a property-condition audit, a technical design audit, a standing SCM advisory retainer, or a substitute for the duties of the project professionals, SCM, Finance, the BAC, the CFO, the CEO or the accounting authority.

Item	Information supplied for the review
Underlying tender	SS/ROOF REPAIRS AND MAINTENANCE/05/2024
Contractor	AR Projects
Original contract value	R21,144,037.66 including VAT
Proposed revised value	R25,372,845.19 including VAT
Indicated net increase	R4,228,807.53 including VAT (20.00% of the original value)
Status of figures	Indicative only. The appointed reviewer must independently verify the values, cumulative change history and threshold treatment.

Only the above contract and its related approvals, instructions, certifications, payments and change history fall within this assignment. Records from unrelated contracts must be excluded.

2. PURPOSE AND REQUIRED ASSURANCE CONCLUSION

The purpose is to give Iziko's SCM function, CFO and CEO an independent, evidence-based view on whether the BAC process and recommendation, together with the underlying contract-change package, are complete, procedurally fair, properly classified, arithmetically accurate, supported by competent technical and financial evidence, compliant with applicable prescripts and delegations, and fit to proceed to the next decision point.

The final report must state one of the following conclusions and give reasons:

- No material adverse finding: the matter may proceed to the next delegated decision, subject to stated reporting or administrative actions.
- Conditional progression: the matter may proceed only after specifically listed conditions are completed and independently verified.
- Defer and remediate: the matter must be returned to SCM, the project owner, Finance or the BAC for identified corrections or missing evidence.
- Do not proceed in its current form: a new procurement, legal determination, investigation or other remedial process is required.

The service provider does not approve, condone, regularise or ratify the contract change. The report is advisory assurance and does not replace any delegated approval, statutory reporting, legal opinion or technical certification.

3. TERMINOLOGY TO BE APPLIED

Colloquial use of “variation” and “expansion” must not be accepted without analysis. The reviewer must classify each change item and the cumulative transaction using the following working distinctions, read with the signed contract and current prescripts:

Term	Required treatment
Expansion	An increase in the scope of work, consistent with paragraph 5.1(a) of PFMA SCM Instruction 3 of 2021/22.
Variation	A change to the scope of work, consistent with paragraph 5.1(b) of PFMA SCM Instruction 3 of 2021/22.
Variation order / change instruction	The formal contractual instrument issued by the person authorised under the signed contract. Its validity, timing, authority, valuation and effect must be tested.
Remeasurement	Adjustment of quantities for work already within the priced scope. It must be separated from new or changed scope and supported by measurement records.
Contingency	A budget allowance, not automatic authority to instruct, certify or pay work. Draw-downs must be traceable to authorised changes.
Extension of time	A change to the contract period. The motivation must distinguish time from scope, cost and any prolongation claim.
Retrospective / executed work	Work instructed, performed, certified, claimed or paid before the required approval. It must be separately identified and must not be presented as prospective.
New procurement	Work that is materially different, insufficiently connected to the original tendered scope, or otherwise incapable of lawful inclusion under the contract.

4. GOVERNANCE SEQUENCE AND INDEPENDENCE

Stage	Responsible party	Required record
1	Project owner and Finance	Compile and reconcile their respective project and finance records.
2	SCM	Quality-check the complete submission; arrange the project-specific BAC and retain the official record.
3	Project-specific BAC	Consider the submission and record a reasoned recommendation, quorum, declarations and any dissent.
4	Independent reviewer	After the BAC recommendation is recorded, perform this probity review and issue an independent report.
5	CFO	Review the full record and the probity report, then make a recommendation without participating in the deciding BAC.
6	CEO / other delegated authority	Take the applicable decision in terms of the delegations and direct any required Treasury/AGSA action.

Independence and conduct requirements

- The firm and every proposed team member must disclose all actual, potential or perceived conflicts and all work performed during the past five years for Iziko, AR Projects, OLA, any project subcontractor, any certifier or any person who prepared or considered the submission.
- No reviewer may have prepared, edited, validated or advocated for the contract-change submission; certified or measured the work; advised the BAC before it recorded its recommendation; represented the contractor; or participated in the underlying tender or change decision.
- The reviewer must not attend or influence the BAC’s deliberations for this matter. The post-BAC record may be provided only after the recommendation is finalised and minuted.
- All requests and clarifications must be channelled through SCM and recorded in a clarification log. Direct contact with the contractor or project professionals requires SCM’s prior written authorisation.
- The final report must be addressed to SCM and provided for the attention of the CFO and CEO. The reviewer owes its independent duty to Iziko, not to the project owner, contractor or BAC.

5. DETAILED SCOPE OF WORK

The appointed service provider must perform and document, at minimum, the following procedures:

- Confirm the completeness and internal consistency of the indexed record and maintain a document-request and gap log.
- Confirm that the original contract was validly awarded, signed, remained legally and contractually capable of amendment at the relevant dates, and identifies the persons authorised to instruct, measure, certify and approve changes.
- Prepare a line-by-line change register classifying each item as remeasurement, expansion, variation, variation order/change

instruction, contingency draw-down, time extension, retrospective work, or potential new procurement.

- Identify separately what was proposed, instructed, executed, measured, certified, claimed, committed and paid, including dates and authorising persons.
- Recalculate the original value, prior changes, current proposed change and cumulative revised value on both gross-addition and net bases; reconcile omissions, contingency, VAT, professional fees, escalation and any provisional sums; and tie the result to the BOQ, variation register, general ledger, payment vouchers and commitments.
- Test the exact threshold position, including whether the cumulative amount is equal to or more than 20%, whether the R20 million limb is relevant, and whether paragraph 5.4 of PFMA SCM Instruction 3 of 2021/22 or any stricter Iziko policy threshold is triggered.
- State the precise National Treasury and AGSA action required under the framework in force: reporting, disclosure, consultation, approval or written confirmation; identify the responsible official, form and due date. The reviewer must not assume that all threshold exceedances have the same consequence.
- Assess whether each change remains sufficiently connected to the original tendered purpose and scope and does not materially alter the nature of the competition or improperly avoid a new procurement.
- Assess contractual entitlement, necessity, value for money, rate build-ups, quantity support and the reasonableness of technical certifications. The reviewer must verify the certifier's appointment, competence, experience and independence.
- Assess relevant heritage, asbestos, occupational health and safety, CIDB, insurance, performance-security, tax/CSD and other project-specific compliance evidence, without representing that the probity review is itself a specialist technical audit.
- Reconcile funding, budget availability, cash-flow provision, ledger postings, payment vouchers and the separation between certified, paid, committed and forecast amounts.
- Review the BAC appointment instrument, composition, competence, quorum, conflicts, information considered, deliberations, minutes, dissent and recommendation against Iziko's SCM system and delegations.
- Evaluate whether reasons are contemporaneous and supported by primary evidence; identify retrospective rationalisation, missing approvals, contradictory records, control overrides or other indicators requiring escalation.
- Record findings by severity (critical, high, medium or low), obtain factual responses through SCM, assess the responses, and state clear remedial actions, owners and deadlines.

6. MINIMUM DOCUMENT SET TO BE REVIEWED

Record owner	Minimum records
SCM	Original bid invitation, specifications, evaluation and award approvals; signed contract and contract data; procurement plan; applicable SCM policy and delegations; supplier due diligence; all previous approved changes; SCM compliance report.
Project owner / programme	Indexed chronology; condition assessments; OLA and other professional reports; signed instructions; variation/change register; site minutes, photographs and correspondence; measurement records; certificates; claims; extension-of-time records; heritage/asbestos/OHS records; evidence of each certifier's appointment, competence, experience and conflicts.
Finance	General-ledger extract; purchase orders and commitments; payment vouchers, invoices and payment dates; funding and budget confirmation; reconciliation of certified, paid, committed and forecast values; VAT treatment.
BAC / SCM secretariat	BAC appointment instrument; member competence records; signed declarations; agenda and complete pack; attendance and quorum; minutes or recording; questions and clarifications; evaluation, reasons, recommendation and any dissent.
Contractor / professional team records	Current programme; priced and revised BOQs; rate build-ups; quotations and supporting schedules; insurance and security; signed claims/certificates; subcontractor evidence where relevant. These records must be supplied through SCM.

The reviewer must distinguish records originating from Finance from project records. Finance is not expected to create or certify technical/project records, and the project owner is not expected to recreate official ledger or payment-voucher evidence.

7. DELIVERABLES AND DELIVERY PERIOD

Deliverable	Minimum content	Due date
1. Inception and independence file	Signed firm/team independence declaration; confirmed scope; work plan; information protocol; initial document-request list.	Within 1 business day after written appointment.
2. Completeness and gap report	Indexed documents received; missing/contradictory records; responsibility and cut-off for submission.	Within 1 business day after receipt of the BAC pack.
3. Draft probity report	Executive summary; scope and limitations; procedures; change classification; cumulative threshold calculation; BAC-process review; findings and severity; required remedies; proposed conclusion.	Within 3 business days after SCM confirms the pack is complete.
4. Factual verification schedule	Written management responses and evidence; reviewer's assessment of each response; unresolved matters. Factual verification may not be used to rewrite history or influence the assurance conclusion improperly.	One consolidated clarification round, unless SCM authorises another.
5. Final signed report and close-out	Final report in searchable PDF and editable Word; one-page executive brief; annexed change calculation, document list, gap log, clarification log and findings/action schedule; presentation to SCM, CFO and CEO if requested.	Within 2 business days after receipt of consolidated factual comments.

The service provider must identify any limitation immediately. A deadline is suspended only where SCM confirms in writing that a material required record is outstanding. Failure of the record must still be reported as a finding; it may not simply be assumed away.

8. MANDATORY RETURNABLES

A quotation that does not meet a mandatory requirement may be treated as non-responsive, subject to the law and Iziko's SCM policy on clarification of administrative omissions.

No.	Mandatory returnable
1	Current CSD registration and information enabling Iziko to verify tax-compliant status.
2	Completed and signed SBD 4 and SBD 6.1 contained in this RFQ.
3	Signed quotation and completed fixed-price schedule, inclusive of all disbursements and VAT where applicable.
4	Signed assignment-specific independence and conflict declaration in section 11, covering the bidder and every proposed team member.
5	CVs, identity of employer/subcontractor and certified or independently verifiable evidence of qualifications and current professional registrations for all key personnel.
6	Proposed lead reviewer with at least seven years' relevant public-sector probity, assurance, SCM or governance experience, including contract-change reviews.
7	Proposed construction-contract specialist with at least five years' relevant construction contract administration, measurement, variation/change-control or cost-assurance experience and an appropriate built-environment qualification/registration. One person may fulfil both key roles if all requirements are met.
8	Evidence of current professional-indemnity insurance of not less than R4,000,000 for any one claim and in the annual aggregate. A broker/insurer confirmation may be submitted with the quotation, but the policy schedule and certificate required by section 12 must be supplied before appointment and before access to the review pack.
9	Acceptance of Iziko's confidentiality, information-security and POPIA requirements and undertaking to sign Iziko's NDA before receiving the review pack.
10	Signed acceptance of the professional-indemnity, reliance, liability and contractual-penalty provisions in section 12, without material qualification.

9. FUNCTIONALITY EVALUATION

Only responsive quotations will be evaluated for functionality. The minimum qualifying score is 70 out of 100. A bidder that does not achieve the threshold will not proceed to price and specific-goals evaluation.

Rating	Interpretation
0	No response or no relevant evidence.
1	Materially inadequate; fundamental misunderstanding or unsupported claims.
2	Partially responsive; major gaps or material execution risk.
3	Adequate and feasible; meets the requirement with acceptable evidence.

Rating	Interpretation
4	Good; detailed, well evidenced and low execution risk.
5	Excellent; assignment-specific, comprehensive and demonstrably robust.

For criteria scored using the above scale: points = rating ÷ 5 × weighting. Evaluators must record reasons linked to the submitted evidence.

Criterion	Evidence and scoring focus	Weight
1. Bidder's relevant experience	Completed assignments in the last five years involving independent probity/assurance or post-award review of public-sector procurement or construction contract changes. Submit scope, dates, value, client contact and reference evidence. 4 or more closely comparable assignments = 20; Rating 5 3 = 15; Rating (3,75) 2 = 10; Rating (2.5) 1 = 5; Rating (1.25) none = 0. (Rating 0)	20
2. Lead reviewer	Qualifications/professional standing; years and depth of public-sector SCM/probity assurance; experience reviewing BAC governance, PFMA compliance and contract changes; quality of submitted CV and comparable examples. Use 0–5 rating scale.	20
3. Construction-contract specialist	Qualifications/current registration where applicable; experience in the relevant form of contract, BOQ/measurement, rates, cumulative variation analysis and construction change control. Use 0–5 rating scale.	20
4. Assignment-specific methodology	A methodology that demonstrates understanding of post-BAC independence; document completeness; terminology/classification; cumulative threshold calculation; finance/BOQ reconciliation; BAC-process testing; evidence handling; severity grading; factual verification; clear final conclusion. Use 0–5 rating scale.	30
5. Work plan and availability	Named resources, immediate availability, allocation of hours, ability to meet section 7, quality controls and contingency for urgent clarification. Use 0–5 rating scale.	10
TOTAL		100

10. PRICING

Bidders must quote a fixed, all-inclusive lump sum for the complete assignment. The price must include professional time, quality review, administration, professional-indemnity insurance, ordinary communications, travel/disbursements, the clarification round and all deliverables. No hourly "as and when required" retainer is contemplated. The total including VAT will be used for price evaluation.

No.	Fixed-price component	Excl. VAT (R)	Notes / assumptions
1	Inception, independence file and initial document request		
2	Completeness review, gap log and review of full post-BAC pack		
3	Detailed analysis, reconciliations and draft probity report		
4	One consolidated factual-verification and management-response round		
5	Final signed report, annexures and one-page executive brief		
6	Close-out presentation to SCM/CFO/CEO (if requested) – Must be priced. Where not priced; it will be accepted that this will be provided at no charge if requested.		
7	All disbursements and other costs		
	TOTAL EXCLUDING VAT		
	VAT		
	TOTAL INCLUDING VAT		

Optional additional work will be undertaken only on SCM's prior written instruction and after a written quotation is approved under the applicable delegation. For that purpose only, state the lead reviewer hourly rate (excluding VAT): R____________ and construction-contract specialist hourly rate (excluding VAT): R____________. These rates are not part of the evaluated lump-sum price.

11. ASSIGNMENT-SPECIFIC INDEPENDENCE DECLARATION

The authorised bidder representative must complete this declaration for the firm and attach a schedule signed by each proposed team member.

Question	Yes / No	Full disclosure / mitigation
Has the bidder or any team member worked for Iziko during the past five years?		
Has the bidder or any team member worked for AR Projects, OLA, a project subcontractor, certifier or other professional connected with the underlying contract during the past five years?		
Did the bidder or any team member prepare, edit, validate, certify, measure, advise on or advocate for the original tender, the contract-change submission or the BAC process?		
Does any financial, personal, family, business or professional relationship exist that could reasonably be perceived to impair independence?		
Can the bidder comply with the restrictions in section 4 and report independently to SCM, CFO and CEO?		

I certify that the above disclosures are complete and that any change will be reported to SCM immediately.

Bidder / enterprise		Authorised representative	
Signature		Date	

12. PROFESSIONAL INDEMNITY, RELIANCE AND CONTRACTUAL REMEDIES

Professional-indemnity insurance

- Before appointment and before receiving the review pack, the successful bidder must provide a certificate of insurance and policy schedule issued by an insurer authorised to conduct insurance business in South Africa. The policy must provide professional-indemnity cover of not less than R4,000,000 for any one claim and in the annual aggregate for negligent acts, errors, omissions and negligent misstatements arising from the services.
- The evidence must disclose the insurer, policy number, insured entity, limit, annual aggregate, excess, material exclusions, retroactive date and expiry date. The bidder must disclose any exclusion that could materially affect this assignment, including an exclusion for public-sector, procurement, probity, advisory or contractual-liability work.
- Cover must remain continuously in force from appointment until at least 36 months after acceptance of the final report. If the policy is claims-made, its retroactive date may not be later than the appointment date and equivalent run-off cover must be maintained. Proof must be supplied on each renewal, and SCM must be notified within two business days after the service provider becomes aware of any cancellation, lapse, claim, material exclusion or reduction in cover.
- Failure to maintain or evidence the required cover is a material breach. The insurance requirement does not limit the service provider’s liability under the contract, and the service provider remains responsible for any excess, exclusion or uninsured amount.

Reliance-based accountability trigger

The final signed report must clearly state its material assumptions, qualifications, evidence gaps and reliance conditions. For this section, a Trigger Event occurs only if all of the following are established:

- Iziko materially relied on an express conclusion or recommendation in the final signed report that the transaction could proceed, and Iziko implemented that advice without a material deviation relevant to the later finding.
- Iziko supplied materially complete and accurate information requested by the service provider, or the service provider failed to identify a material gap or contradiction that a reasonably competent reviewer performing the agreed procedures should have identified.
- After the applicable assessment or investigation and after the service provider has had a reasonable opportunity to respond, the accounting authority, National Treasury, AGSA, or a court or tribunal with jurisdiction makes a final written finding that the resulting expenditure is irregular expenditure under the PFMA.
- A material negligent, reckless, wilful or fraudulent act, error or omission in the services was a direct cause of the non-compliance underlying that finding. A difference of professional opinion, a finding unrelated to the written advice, or the mere recording of irregular expenditure without this causal link is not by itself a Trigger Event.

Penalty and other remedies

If a Trigger Event occurs, the service provider must cooperate fully and at its own cost with the assessment, investigation, audit response and reasonable remediation of its defective work. Subject to written notice and the service provider's right to respond within 10 business days, Iziko may impose a contractual penalty equal to 60% of the total contract price, including VAT, paid or payable for this assignment.

For the same act or omission, Iziko may elect to recover the contractual penalty or proven direct damages, including reasonable costs of investigation, re-performance and remediation, but may not recover both the penalty and damages. This election does not prevent termination, set-off where legally permissible, a claim under the professional-indemnity policy, or referral to the insurer, a professional body or another competent authority, provided there is no double recovery. Nothing excludes liability for fraud, wilful misconduct or any liability that may not lawfully be limited. The penalty is subject to the Conventional Penalties Act 15 of 1962 and the dispute-resolution provisions of the final contract.

13. Preference Points Claim

SBD 6.1 Preference Points Claim form in terms of the Preferential Procurement Regulations of 2022. The points are allocated as follows:

Preference Point Summary

Description		Points Allocated
1.	**Price**	**80 Points**
2.	**Specific Goals**	**20 Points**

14. Formal Contract

a) The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider.

b) A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider/s.

15. General Principles

a) The lowest or only quotation received will not necessarily be accepted.

b) Iziko and its Council reserve the right to accept or reject any quotation in response to the Request to Quote and to withdraw its decision to seek the provision of these services at any time.

16. Consent

The Bidder, by signing this document, hereby consents to the use of their personal information described herein and confirms that:

- they have obtained all the necessary consent from their shareholders/directors or counterparts, including the consent for Iziko to receive and process such personal information.
- Failure to provide the information will result in the objectives of the RFQ not being achieved, with the Bidder being disqualified.
- The Bidder voluntarily submits this bid/document containing personal information, for the purposes of the RFQ.

Iziko is committed to protecting the Bidder's privacy and recognises that it needs to comply with statutory requirements in collecting, processing, and distributing personal information.

The Constitution of the Republic of South Africa provides that everyone has the right to privacy. The Protection of

Personal Information Act 4 of 2013 (POPIA) protects personal information against unlawful collection, retention, dissemination and use. If personal information is collected by Iziko, as responsible party, Iziko must take reasonably practicable steps to ensure that the data subject is informed as required by POPIA.

17. Declaration

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise:

i) confirms that neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;

ii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;

iii) confirms that I / we are not associated, linked or involved with any other tendering entity submitting an offer and have no relationship with another tenderer or a person responsible for compiling this scope of work that could cause, or reasonably be perceived as, a conflict of interest; and

iv) confirms that the contents of this questionnaire and the SBD 4 and SBD 6.1 forms are within my personal knowledge and are, to the best of my belief, true and correct;

v) accept that, in addition to cancellation of a contract, action may be taken against me should the Declaration prove to be false.

Signed -- Date --

Name -- Position --

Enterprise name

Please note: if required supporting documentation is not provided, the quotation may be classified as non-responsive, subject to applicable law and Iziko's SCM policy.

1. Disqualification

If a quotation is incomplete, the pricing is not done according to the specified criteria, does not comply with the specification, is received after the closing date and time, or the supplier is not registered on the CSD or does not have tax-compliant status, it may be disqualified, subject to applicable law and Iziko's SCM policy. Return this document with all required supporting documents.

2. Bid Document Submission

Emailed quotations will be accepted. The bidder is responsible for ensuring that the complete submission is received by Iziko by the closing date and time.

Do not alter this RFQ other than completing bidder details, declarations and pricing. A material unauthorised alteration may render the quotation non-responsive.