



## REQUEST FOR QUOTATIONS (RFQ)

**IMPORTANT NOTICE:**

**SALGA IS EMBARKING ON A FULLY AUTOMATED SUPPLY CHAIN MANAGEMENT (SCM) PLATFORM. A SMARTER, FASTER WAY TO MANAGE PROCUREMENT AND SUPPLIER RELATIONSHIPS, DESIGNED TO DRIVE EFFICIENCY & TRANSPARENCY. THE PLATFORM WILL BE LAUNCHED IN FEBRUARY 2026.**

**FOR FURTHER ASSISTANCE CONTACT [scm@salga.org.za](mailto:scm@salga.org.za)**

You are hereby invited to submit Quotation for the requirements of  
**SALGA**

<b>RFQ number:</b>	RFQ 009/2026
<b>RFQ Issue Date</b>	27 FEBRUARY 2026
<b>COMPULSORY/ NON COMPULSORY BRIEFING SESSION</b>	None
<b>Briefing Session Date and Time: (if applicable)</b>	None
<b>RFQ Closing date:</b>	13 March 2026 at 11:00am
<b>RFQ Description:</b>	<b>REQUEST FOR PROPOSALS FOR THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A LOCAL GOVERNMENT SITUATIONAL ANALYSIS TO INFORM SALGA's 2027-2032 STRATEGY</b>

**SPECIFICATIONS**

Terms of Reference /Specifications Attached to the Email.

**Please note:**

1. Quotation should be valid for at least 30 days.
- Is the offer strictly according to specifications? Yes/No
2. If not to specification, state deviation(s)
3. Please indicate your delivery period:
4. All the Standard Bidding Documents (SBD) forms must be completed in full and returned with the quotation.
5. Please indicate a valid Central Supplier Database (CSD) registration number on your quotation. Tax status will be verified on CSD.
6. All prices must be VAT inclusive, if no indication is given, prices will be evaluated as inclusive.
7. No quotations received after closing time and date will be accepted without prior arrangement with the sender of this request.
8. It is the responsibility of the vendor to verify the receipt of any quotations forwarded to this office.
9. If you are unable to quote, please respond to the sender and state the reason/s for not quoting.
10. This quotation is subject to the general conditions of contract, as well as any special conditions stated in the specifications.
11. Requests relating to procurement of goods for designated sectors, the quotations shall be evaluated in relation with the minimum thresholds for local production and content prescribed per sector:
12. For bids of above R2 000 to R50 million, SALGA evaluates these in terms of the 80/20 adjudication criteria where:
  - a) Price: 80 b) BBBEE Level of contribution: 20 TOTAL: 100
13. For bids of above R50 million, SALGA evaluates these in terms of the 90/10 adjudication criteria where:
  - a) Price: 90 b) BBBEE Level of contribution: 10 TOTAL: 100

**NAME OF SERVICE PROVIDER:**

**TOTAL PRICE (INCL VAT):**

I hereby accept the above-mentioned conditions.

**This RFQ is subject to the general conditions of the RFQ, National Treasury's general conditions of contract (GCC) and, if applicable, any other special conditions of contract (SCC).**

**NAME OF BIDDER (COMPANY NAME)**

**SIGNATURE**

**CAPACITY:**

**DATE:**

**REQUEST FOR PROPOSALS FOR THE APPOINTMENT OF A  
SERVICE PROVIDER TO CONDUCT A LOCAL GOVERNMENT  
SITUATIONAL ANALYSIS TO INFORM SALGA's 2027-2032  
STRATEGY**

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**Closing date and time: 13 MARCH 2026 @11:00AM**

**EMAIL: [Pnzuz@salga.org.za](mailto:Pnzuz@salga.org.za)**

## 1. INTRODUCTION

The South African Local Government Association (SALGA) is an Organ of State established by its members and recognised through the Organised Local Government Act (Act 52 of 1997) to assist in the comprehensive transformation of local government in South Africa. SALGA has opted to manage its planning and reporting processes within the Revised Framework for Strategic and Annual Performance Plans as published by the Department of Planning, Monitoring and Evaluation.

## 2. SALGA MANDATE

Developmental Local Government is an essential component of the machinery of government. In accordance with its constitutional mandate, SALGA is obliged to transform the local government sector to one that has the required capacity to make a meaningful contribution to poverty alleviation, economic development and all socio-economic opportunities that the state has geared itself to provide for its people. SALGA also serves as the representative voice of all 257 municipalities in the country. For the past 30 years, since its establishment, SALGA has endeavoured to bring focus to its mandate of supporting local government transformation in a complex environment, characterised by a highly diverse and diffuse membership-base of municipalities. In terms of its amended Constitution, SALGA is a unitary body that consists of a national association and nine provincial offices. Its mandate rests on six primary pillars:

- **Representation, Advocacy and Lobbying** refer to representing the interests of members in legislatures and other policy making and oversight structures. It also refers to engaging with various stakeholders, public debates etc. in the interest of Local Government.
- **Employer Body** refers to being an effective employer representative for members. Employer representation is carried out through collective bargaining (in terms of the Labour Relations Act) in various structures including but not limited to those established in the South African Local Government Bargaining Council.
- **Capacity Building** refers to facilitating capacity building initiatives through among others, representing member interests in the Local Government Sector Education Authority (LGSETA). SALGA strives to facilitate a coherent, well-co-ordinated capacity building programme for municipal councillors and officials.
- **Support and Advice** refer to the provision of tools and services that enable municipalities to understand and interpret trends, policies and legislation affecting Local Government and to implement the said policies and plans.

- **Strategic Profiling** of Local Government refers to enhancing the profile and image of local government as an important and credible agent for the delivery of services. Profiling focuses within South Africa, the African continent and the rest of the world.
- **Knowledge and Information Sharing** refer to building and sharing a comprehensive hub of Local Government knowledge and intelligence that will enable informed delivery of other SALGA mandates. The knowledge hub is also a useful reference point for all who seek Local Government information.

### **3. BACKGROUND CONTEXT**

#### **3.1 SALGA 5-Year Strategic Plan**

As SALGA approaches the final phase of its 2022–2027 strategic plan, it is imperative to begin preparations for the forthcoming term of office. This transition presents an opportune moment to propose a robust strategic agenda for the 2027–2032 period, ensuring continuity, innovation, and responsiveness in local governance.

Currently, SALGA is working towards the final leg of its 2022–2027 strategy, a period marked by significant progress and lessons learned in advancing municipal excellence and developmental priorities. The imminent shift to the next strategic cycle necessitates a careful review of ongoing initiatives and a forward-looking approach to address emerging challenges and opportunities within the local government sphere.

Several critical developments are shaping the environment in which SALGA operates. Notably, the review of the White Paper on Local Government is underway, signalling potential policy reforms and a renewed vision for the sector. Alongside this, the review of the local government funding model is poised to influence the financial sustainability and effectiveness of municipalities, underscoring the importance of resource allocation and fiscal management in achieving developmental objectives.

#### **3.2 Situational Analysis**

A situational analysis is the process used to collect, evaluate and organise information regarding the organisation's internal and external environments. Various and multiple frameworks can be applied to conduct a situational analysis for strategic planning. The service provider should be mindful of identifying frameworks and models that would be best suited in the public sector and policy environments, considering its approach in reframing internal negatives as constraints to be managed and emphasis on context, structural realities, and resourcing.

Insights gained from this situational analysis would ensure that SALGA's strategy is dictated by the realities of the environment in which it operates in. Resultantly, there will be strategic alignment of organisational intents with current and emerging trends in the environment. This alignment is intended to keep SALGA relevant and concurrently lends itself to the pursuits of developmental local government.

#### **4. PURPOSE OF THIS REQUEST**

The purpose of this document is to call for proposals from suitable service providers to assist SALGA to conduct a local government situational analysis that will inform its 2027-2032 strategy. The assignment should assess the changes in policy directions, sectoral reforms and macro socio-political and economic variables that SALGA will need to respond to in fulfilling its mandate over the forthcoming Five-year period. Further to this, the assignment should review SALGA's internal processes, policies, technology and resources that will be needed to respond to the external environment.

The situational analysis must provide a comprehensive understanding of the internal and external factors that impact SALGA's ability to fulfil their mandate to communities and outline the opportunities that exist to transform local governments into robust, transparent, and citizen-focused institutions, ensuring equitable and sustainable service delivery for all South African residents.

#### **5. OBJECTIVES OF THIS REQUEST**

The objectives of the assignment are outlined as follows:

- 5.1. To conduct an environmental scan of both the internal and external environment within which SALGA operates. This objective involves undertaking a systematic assessment of the factors, trends, and dynamics that influence SALGA's work and the broader local government sector. The internal scan will review organisational capacity, structures, resources, and operational processes, while the external scan will consider policy changes, sectoral reforms (such as the review of the White Paper on Local Government and funding model), socio-economic trends, stakeholder expectations, and emerging challenges or opportunities
- 5.2. To collect, conduct, and analyse data on the following external environmental factors affecting the role of SALGA: Political, Policy, Economic, Social, Technological, Environmental, Legal. This objective involves identifying and appropriate framework that will be applied to assess the external environment of SALGA. The assignment will analyse political-economy factors and implementation risks, including the implications

of funding model reform, the White Paper on Local Government review, coalition dynamics, and institutional capability.

- 5.3. To apply an appropriate analytical framework that will support realistic, implementation-focused planning, especially where risk management, capacity constraints, and service delivery realities matter. This objective involves identifying a sound methodology to evaluate the internal environment, assess risks to strategic delivery and embed practical risk mitigation measures into all strategic options.

## **6. SCOPE OF WORK**

The scope of work is structured to ensure analytical rigour, actionable insights, and alignment with sectoral reforms as detailed below:

- 6.1. Define the boundaries of the areas to be included in the situational analysis by applying an appropriate framework based on sound methodological justifications.
- 6.2. Conduct in-depth research that applies a relevant framework to describe the current state and condition of SALGA's internal operating environment and external factors informing the local government environment more broadly.
- 6.3. Identify the trends in conditions, the pressures being exerted on local government and the SALGA macro- and microenvironment, the underlying forces driving the pressures, and the responses to the pressures at national and local levels.
- 6.4. Identify the major significant issues or risks that require attention and determine the resources needed to address these issues.
- 6.5. Compile and produce a consolidated report and a presentation profiling the SALGA external and internal environment.
- 6.6. Prepare monthly progress reports and presentations for the project steering committee to review progress and guide the implementation of the project.

The service provider will be responsible for project planning, stakeholder engagement, and reporting, ensuring all activities are completed within the designated three-month period and are aligned with SALGA's governance requirements.

## **7. DELIVERABLES**

The service provider is required to produce the following outputs, each explicitly addressing the enhancements outlined in the Scope of Work:

- 7.1 Inception Report:** Submit a concise inception report within two weeks of appointment, demonstrating a clear understanding of the assignment and the scope of work. The report

must detail the planned activities, major milestones, timelines, key deliverables, and an itemised budget aligned to project requirements.

**7.2 Bi-Weekly/Monthly Progress Reports:** The assignment will be managed through a SALGA project steering committee which will be convened periodically. The service is required to submit bi-weekly or monthly reports to the project steering committee to facilitate effective monitoring of project progress. These reports will enable informed discussion and support tactical decisions necessary to maintain or restore the project's trajectory, address risks and issues raised by the project team, and recommend or approve changes related to the scope, budget, or schedule.

**7.3 A concise report:** synthesising system-level constraints, critical bottlenecks, and prioritisation choices, with explicit 'do/defer/stop' recommendations for SALGA. The report must be delivered within the initial phase and serve as the foundation for subsequent strategic planning activities.

**7.4 Situational Analysis report:** A dedicated report or integrated section that examines key political-economy drivers and implementation risks (e.g., funding reforms, legislative changes, coalition governance, institutional capacity). The analysis must provide risk maps, mitigation measures, and recommendations for integrating risk management into the strategic plan. The situational analysis should also focus on the internal SALGA environment where the existing legislation, policies and strategies will be reviewed to address the dynamic environment within which local government operates.

**7.5 Summary PowerPoint Presentations – A concise presentation covering the Detailed Situational Analysis for use in briefing governance structures and stakeholders.**

**7.6 Signed-off Project Closeout Report - A comprehensive report summarising all activities, deliverables, outcomes, challenges, and lessons learned, with formal sign-off from SALGA to confirm satisfactory project completion.**

All deliverables must adhere to agreed timelines, quality standards, and ensure adequate time for review and consultation with the project steering committee.

## **8. PROJECT TIMEFRAME**

The appointed service provider will be required to complete the deliverables within a period of three months from the date of appointment, ensuring that there is sufficient time allocated for consultation with the project steering committee.

## **9. COMPETENCY REQUIREMENTS**

The service provider must have experience and knowledge in the following:

- 9.1. The service provider must demonstrate substantial experience in managing and delivering projects within the local government sector. This includes a track record of successful engagements with similar organisations and familiarity with governance structures, policy frameworks, and operational environments relevant to local government.
- 9.2. The service provider must have expertise in developing comprehensive strategic plans informed by environmental scanning, stakeholder engagement, and data analysis is essential. The service provider should be able to translate strategic objectives into actionable annual and operational plans, ensuring alignment with organisational mandate and goals.
- 9.3. The service provider must possess strong project management skills to ensure that all deliverables are completed within the specified nine-month timeframe. This includes experience in coordinating multi-phase projects, facilitating consultations with governance structures, and adhering to quality standards and review processes.
- 9.4. The service provider must have the ability to produce comprehensive, high-quality reports including closeout reports that clearly summarise activities, outcomes, challenges, and lessons learned. All documentation must meet formal sign-off requirements and facilitate effective communication with stakeholders.
- 9.5. The service provider must be able to protect the integrity of the assignment and avoid conflicts of interest.
- 9.6. The team assigned to this project must include experienced specialists with relevant expertise. A clear organogram and curriculum vitae of all key staff should be provided, ensuring continuity and expertise throughout the project duration.

## **10. CONTENT OF PROPOSAL**

The proposal should, at a minimum, include:

- 10.1. All relevant perceived strengths and weaknesses of the firm bidding for the service, e.g. similar previous experience, in-house skills, etc; providing information which will assist SALGA to assess its capabilities, competitive advantages, etc.
- 10.2. Summary of the bidder's mission statement, the vision statement, values and long-term strategies and objectives as comprehensively as possible.
- 10.3. List of references of previous and current appointments relevant to the required services; examples of such services capabilities and experience and more specifically the number and size of organisations where service rendered in specific sectors in government and areas of expertise.
- 10.4. An organogram or list of partners, managers, specialists, together with the curriculum vitae of the staff who will be available for the duration of the project; any staff changes regarding staff allocated to SALGA must be done in consultation with the Project

- Manager representing the organisation. The successful bidder should provide experienced specialists relevant to the required services.
- 10.5. A breakdown of the cost, VAT inclusive, per category as required for services rendered. Expenditure incurred without the prior approval of SALGA will not be reimbursed. An analysis of costs must be given to cover the full amount, and where possible, costs should be linked with specific tasks to be undertaken. All other incidental costs should be included in the budget breakdown.
- 10.6. In so far as is possible, a comprehensive budget, showing the service of activities proposed, with charge-out rates and budgeted hours per activity, detailing all assumptions made in arriving at a proposed budget, including all cost factors such as traveling.
- 10.7. The remuneration framework of consultants shall take the following into consideration:
- a) The "Guide on Hourly Fee Rates for Consultants" as issued by the Department of Public Service and Administration (DPSA); and/or
  - b) Remuneration guidelines issued by professional service organisation or regulatory bodies, as may be relevant.
- 10.8. In so far as is possible, provide an overview of the methodology to be applied.

## **11. DESCRIPTION AND EXTENT OF WORK (PROJECT MANAGEMENT)**

### **11.1. Performing of assignments**

Assignments are to be performed in accordance with the industry/profession standards as well as the terms of reference. All reports will be reviewed by the relevant Project Manager representing the organisation. All working papers and reports and documents will become the property of SALGA. The successful bidder shall work with the Strategic Planning division of SALGA on the planning of various phases of the service activities and must be prepared to regularly report the progress to the relevant Project Manager.

### **11.2. Timing of assignments**

The performance of this assignment shall be in accordance with the approved plan by the Project Committee. The final responsibility of approving the scope and extent of the work resides with the relevant Project Manager.

### **11.3. Quality assurance reviews of the work**

The service provider shall ensure that all work conforms to all standards set out by SALGA.

### **11.4. Monitoring progress of assignments**

On a mutually agreed basis, the service provider shall meet with the Project Manager to report progress of the work, and at the Project Committee meetings.

#### **11.5. Payments**

SALGA undertakes to pay out within a reasonable time period all valid claims for work done to its satisfaction upon presentation of a substantiated claim. No payment will be made on outstanding information not submitted by the service provider. The parties shall, upon appointment of the service provider, sign a service level agreement to govern their business relationship. Acceptance of any bid does not mean that work on an uninterrupted basis is guaranteed for the duration of the contract.

#### **11.6. Expenditure incurred by the bidder**

SALGA will not be held responsible for any costs incurred by the bidder in the preparation and submission of the bid.

### **12. INSTRUCTION TO BIDDERS**

#### **12.1. General Instructions**

This document constitutes a Request for Proposal (RFP), which specifies SALGA's requirements for a service provider to render services on behalf of SALGA **to assist SALGA with the development of the 2027 – 2032 Strategic Plan.** The information contained herein provides a format to facilitate bidder's responses to this RFP. It is important that the format be followed closely to help maintain the decision-making timetable. Responses must be presented in the same order as the requirements appear, section by section, and numbered accordingly, with acknowledgement of all clauses. All pricing information should be fully disclosed with all charges clearly defined, i.e. a per unit fee based on activity. Please feel free to address any other potential services not specifically mentioned in this RFP that may be of benefit to the National Executive Committee (NEC) of SALGA which is the organisation's accounting authority.

#### **12.2. Objectives**

SALGA's objective in the call for proposals is to select a service provider suitable for the undertaking of the task: **TO CONDUCT A LOCAL GOVERNMENT SITUATIONAL ANALYSIS TO INFORM SALGA'S 2027-2032 STRATEGY.**

#### **12.3. Terms of Contract**

The term of the contract shall be regulated by the Service Level Agreement (SLA) to be concluded with the winning bidder. It is anticipated that the term of the contract shall be for the duration of the assignment and shall expire upon fulfilment of the scope of work. The contract may be extended by mutual agreement. Thirty (30) days written

notice must be given if either party wishes to terminate the agreement prior to the contract's expiry date.

#### 12.4. Questions during Proposal Process

- Any enquiries regarding this RFP should be directed to Precious Nzuzza at [pnzuzza@salga.org.za](mailto:pnzuzza@salga.org.za) located at the SALGA National Office – 012 369 8000.
- Bidders finding apparent discrepancies or omissions in the RFP should notify SCM at [nneti@salga.org.za](mailto:nneti@salga.org.za) at once. Bidders may during the bidding period, be advised by Addenda, of any additions, clarifications, deletions or alterations to these specifications. All such changes should be covered by the bidder's proposal. Information used in the preparation of a proposal from other than this RFP and any written addenda (considered as the proposal documents) will not be considered as valid or official.

#### 12.5. Submission of Proposal

- Responses are to be submitted to Precious Nzuzza, via email; to E-mail address: [pnzuzza@salga.org.za](mailto:pnzuzza@salga.org.za)
- SALGA will not be responsible for any costs incurred by the bidders associated with the preparation of responses to the RFP.
- Proposals shall be stipulated sums without escalator clauses or other qualifications.

#### 12.6. Contract Award

- SALGA reserves the right to accept any proposal submitted or reject all proposals.
- Any proposal submitted, that is not in complete compliance with the requirements of the proposal documents may be accepted or disqualified, at the option of SALGA.
- Please outline in your proposal the assistance your institution is prepared to provide in order to meet the estimated contract duration period for the full implementation of the scope of work.

#### 12.7. Termination of Contract

SALGA reserves the right to terminate the agreement with 30 days written notice to the winning bidder subject to the following:

12.7.1. the winning bidder fails to perform in accordance with the specified service requirements as set out in the RFP.

12.7.2. the winning bidder otherwise violates the provisions of the RFP to a substantial degree.

#### 12.8. Liability

SALGA will not be held liable for any actions of the winning bidder and/or its employees.

## 12.9. Important Dates

Closing Date :13 March 2026

## 13. CONDITIONS OF BID (FAILURE TO MEET ANY OF THE REQUIREMENTS BELOW MAY RENDER YOUR BID PROPOSAL NON-RESPONSIVE)

- 13.1. The requirement for content of the project proposal section below outlines the information that must be included in bid offers. **Failure to provide all or part of the information may result in your bid being excluded from the evaluation process.**
- 13.2. A contract will be signed with the appointed Service Provider.
- 13.3. The Service Provider will be required to sign confidentiality and indemnity agreements with SALGA.
- 13.4. SALGA may at its own discretion vary an instruction to include more work.
- 13.5. Failure to comply with any condition of this request for a proposal will invalidate respective tender proposal.
- 13.6. In the event that any conflict of interest is discovered during the assignment, SALGA reserves the right to summarily cancel the agreement and demand that all the information, documents and property of SALGA be returned forthwith.
- 13.7. SALGA reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its project proposal.
- 13.8. Bidders shall not make available or disclose details pertaining to their project proposal with anyone not specifically involved, unless authorized to do so by SALGA.
- 13.9. Bidders shall not issue any press release, social media or other public announcement pertaining to the details of their project without the prior written approval of SALGA.
- 13.10. Bidders are required to declare any conflict of interest they may have in the transaction for which the bid is submitted or any potential conflict of interest. SALGA reserves the right not to consider further any bid where such a conflict of interest exists or where such potential conflict of interest may arise.
- 13.11. The bid offers and proposals should be valid and open for acceptance by SALGA for a period of 120 days from the date of submission.
- 13.12. Bidders are advised that submission of a project proposal gives rise to no contractual obligations on the part of SALGA.
- 13.13. Disputes that may arise between SALGA and a bidder must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- 13.14. In addition to adherence to the specific terms and conditions of proposals, provided in this document, the bidder shall be bound by the provisions of the General Conditions of Contract attached hereto, an originally signed copy of which must be submitted together with all other bid documentation.

13.15. All returnable bid documents must be completed in full and submitted together with the bidder's proposal.

13.16. SALGA will not be liable for costs incurred during the site visits or any other cost related to the submission of the bid.

13.17. Completion of the Standard Bidding Documents stated herein below is mandatory, failure to do so may render your bid offer invalid

#### **14. STANDARD BIDDING FORMS**

##### **14.1. Preference Points Claim form**

Form SBD 6.1 - Bidders must complete this document in full, special attention must be given to section 8 and 9. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink.

##### **14.2. Declaration of Interest**

Form SBD 4 - Bidders must complete this document in full. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink.

#### **15. EVALUATION**

The following evaluation method will be used:

After the closing date of the bid invitation, an appointed evaluation committee of SALGA officials and possibly other external parties will evaluate the proposals of the bidders.

The committee will individually evaluate each of the bid proposals received against the appointed criteria as provided for in Preferential Procurement Regulations, 2022

All proposals submitted will be evaluated on three categories:

- Functionality (technical content)
- Price
- Specific goals

Bids will be evaluated in accordance with the Preferential Procurement Regulations, 2022, using the 80/20 split. The 80/20 preference points system applies for acquisition of goods or services for Rand value equal or above R2 000 and up to R50 million.

Firstly, the assessment of functionality will be done in terms of the evaluation criteria and the minimum threshold value of 70 points. A bid will be disqualified if it fails to meet the minimum threshold value for functionality as per the bid invitation.

A Bid Evaluation Committee will review and evaluate the proposals. Bidders may be invited to present their proposal for the purpose of providing clarification and answers to questions by

the committee. If presentations are necessary, they will be made on the date, time and location to be confirmed.

Thereafter, only the qualifying bids after the presentation will be evaluated in terms of the 80/20 preference points systems, 80 points will be used for price only and the 20 points will be used for B-BBEE Status Level of Contribution and Specific Goals. The price points will be calculated in accordance with the formula prescribed in Regulation 6. (1) of the Preferential Procurement Regulations, 2022.

A recommendation for the awarding of the contract will be made at the meeting of the Bid Adjudication Committee to be confirmed, where applicable.

For functionality, the following criteria will be applicable and the maximum value of points breakdown for each criterion using these scale level descriptors:

SCALE LEVEL DESCRIPTIONS	RATING
No relevant response or information given to enable evaluation	0
<b>Very poor</b> response based on expected standard	1
<b>Poor</b> response based on expected standard	2
<b>Average</b> response based on expected standard	3
<b>Good</b> response based on expected standard	4
<b>Excellent</b> response based on expected standard	5

**POINTS BREAKDOWN:**

CRITERIA FOR FUNCTIONALITY:	BREAKDOWN OF POINTS:	WEIGHT:
<b>Project Plan</b> Bidders must provide a project plan with timeframe flowchart indicating start and completion time per proposed activity.	<ul style="list-style-type: none"> <li>0 points = No proposal submitted</li> <li>1 point = Technical proposal without project plan</li> <li>2 points = Technical proposal with project plan but without clear timelines</li> <li>3 points = Technical proposal with project plan and with clear timelines</li> <li>4 points = Technical proposal with sound brief interpretation, timeline flowchart, and clear methods</li> <li>5 points = Technical proposal with project plan, sound brief interpretation, timeline flowchart, clear methods, and innovation ideas</li> </ul>	<b>30</b>

CRITERIA FOR FUNCTIONALITY:	BREAKDOWN OF POINTS:	WEIGHT:
<p><b>Approach and Methodology:</b> The bidder must demonstrate their approach and methodology in conducting situational analysis or research related products</p>	<ul style="list-style-type: none"> <li>• 0 = No demonstration of approach and methodology to be followed.</li> <li>• 1 = a poor demonstration of the approach and methodology</li> <li>• 2 = a brief demonstration of the approach and methodology to be followed</li> <li>• 3 = A demonstration of approach and methodology clearly defined</li> <li>• 4 = A Good demonstration of approach and methodology clearly defined and graphically illustrated</li> <li>• 5 = an excellent demonstration of approach and methodology clearly defined with graphically illustrated and innovative ideas for the roll out.</li> </ul>	<p><b>30</b></p>
<p><b>Company Experience</b> Proven past experience in similar projects (Research, Analysis, and Evaluations)</p> <ul style="list-style-type: none"> <li>• Must be on an approved customer letterhead.</li> <li>• Must be signed.</li> <li>• Must have contact details (Telephone number and/or emails address)</li> <li>• Indicate the LG and Strategy development related research project</li> <li>• Indicate the period in which the services were provided.</li> <li>• Indicate value of the project</li> </ul> <p><b><u>NB: Purchase order, Appointment letters will not be considered.</u></b></p> <p>SALGA reserves the right to contact the references supplied by the bidder.</p>	<ul style="list-style-type: none"> <li>• 0= No reference letter</li> <li>• 1= 1 reference letters</li> <li>• 2 = 2-3 reference letters</li> <li>• 3= 4-5 reference letters</li> <li>• 4= 5-7 reference letters</li> <li>• 5= 7 or more reference letters</li> </ul>	<p><b>20</b></p>
<p><b>Qualifications of Team</b> Curriculum vitae of the team responsible for the project including copies of qualifications must be submitted</p>	<p>Points for academic qualification of individual that will be tasked as Team Leader will be allocated as follows:</p> <ul style="list-style-type: none"> <li>• 0 = No NQF qualification.</li> <li>• 1 = NQF qualification below Level 6</li> <li>• 2 = Relevant NQF Level 6 qualification</li> <li>• 3 = Relevant NQF Level 7 qualification</li> </ul>	<p><b>20</b></p>

CRITERIA FOR FUNCTIONALITY:	BREAKDOWN OF POINTS:	WEIGHT:
	<ul style="list-style-type: none"> <li>4 = Relevant NQF Level 8</li> <li>5 = Above NQF level 9 plus</li> </ul>	
<b>Total for functionality</b>		<b>100</b>
<b>Threshold</b>		<b>70</b>

Bidders who score 70 points and above will be considered in phase 2 of the evaluation. The 80/20 points system will be used when evaluating this Request for Proposal, where 80 is for Price.

The remaining 20 points will be allocated 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 as 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:

Table 1:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	10
2	9
3	7
4	6
5	4
6	3
7	2
8	1
Specific Goals	
SMME's	4
100% Black Women owned	3
100 % Youth	3
<b>Total Points</b>	<b>20</b>

Phase 2 of evaluation will include the sum of the two criterions below:

CRITERIA	WEIGHT
Price	80
Specific Goals	20
<b>TOTAL</b>	<b>100</b>

**Points claimed shall be verified through the Central Supplier Database (CSD) and valid BBEE certificates.**

## **16. GENERAL CONDITIONS**

The following should be noted by interested parties:

- 16.1. Intellectual property and ownership of all materials and products developed in the execution of the contract will be vested in SALGA.
- 16.2. Materials and products may not be made available to any unauthorized person or institution or sold for profit without prior written consent from SALGA.
- 16.3. On completion or termination of the agreement, all materials and products must be handed over to SALGA.
- 16.4. No information concerning the tender or award of the tender may be made available by the bidder to other parties without prior consultation and written approval from SALGA.
- 16.5. SALGA may at its own discretion vary this instruction to include more scope / work or to exclude work/service areas. In the case of the latter, the bidder shall not be entitled to claim for any work not required and may engage SALGA on the pricing of the additional work/ service proposed.
- 16.6. All copyright and intellectual property rights that may result as a consequence of the work to be performed shall reside with SALGA and the service provider shall be required to sign an agreement of confidentiality.
- 16.7. SALGA may dictate the framework in which documents (policies, plans, report etc.) shall be submitted; however, the service provider should be able to submit a proposal on the lay-out of his/her choice for consideration by SALGA.
- 16.8. SALGAs (general conditions of bid, contract and order) shall be applicable to this bid.
- 16.9. The service provider shall be required to conclude and sign a Service Level Agreement (SLA) after the appointment.
- 16.10. SALGA reserves the right not to award the bid to any bidder at its own discretion.

## 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.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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<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.

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.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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<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.

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

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the 90/10 preference point system.
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	10
2	9
3	7

4	6
5	4
6	3
7	2
8	1
<b>Specific Goals</b>	
SMME's	4
100% Black Women owned	3
100 % Youth	3
Total Points	20

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**

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

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**

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

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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
SMME's	4	
100% Black Women owned	3	
100 % Youth	3	

**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.

.....	
<b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....
	.....
	.....