



BID DOCUMENT

BID NO. AW2022/23/32

BID DESCRIPTION

PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION
--

CLOSING DATE

21 NOVEMBER 2022 AT 11H00

NO EMAILED SUBMISSION WILL BE ACCEPTED

BIDDER TO COMPLETE

COMPANY NAME	
---------------------	--

CSD NUMBER	
-------------------	--

ISSUED AND PREPARED BY: AMATOLA WATER
PRIVATE BAG X3
VINCENT
5217
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SECTION A
TENDERING INVITATION, PROCEDURE,
SPECIFICATION AND PRICING

SBD1

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION.

BID NUMBER:	AW 2022/23/32	CLOSING DATE:	21 November 2022	CLOSING TIME:	11:00 AM
DESCRIPTION	PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION.				

THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

BID RESPONSE DOCUMENTS MUST BE DEPOSITED IN THE BID BOX LISTED BELOW

Reception area of Amatola House				
6 Lancaster Road				
Vincent				
East London				
THE BID BOX IS AVAILABLE FOR BIDS TO BE DEPOSITED BETWEEN 08:00AM – 16:00PM FROM MONDAY TO FRIDAY.				
SUPPLIER INFORMATION				
NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				
	TCS PIN:		OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	☐ Yes ☐ No
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?				

AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	☐	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)	
	☐	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)	
	☐	A REGISTERED AUDITOR NAME:	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]			
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ANSWER PART B:3 BELOW]
SIGNATURE OF BIDDER		DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)			
TOTAL NUMBER OF ITEMS OFFERED			
TOTAL BID PRICE (ALL INCLUSIVE)			
BIDDING PROCEDURE AND SCM ENQUIRIES MAY BE DIRECTED TO: mntshoko@amatolawater.co.za		TECHNICAL INFORMATION MAY BE DIRECTED TO: asmit@amatolawater.co.za	
ONLY WRITTEN QUERIES VIA EMAIL WILL BE ATTENDED TO			
PUBLIC ENTITY	AMATOLA WATER		
CONTACT PERSON	Mr. M Ntshoko – SCM Specialist	CONTACT PERSON	Arné Smit - OD Specialist
E-MAIL ADDRESS		E-MAIL ADDRESS	
	mntshoko@amatolawater.co.za		asmit@amatolawater.co.za

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED) OR ONLINE
- 1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
- 1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
- 1.5. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

- 3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?
☐ YES ☐ NO
- 3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?
☐ YES ☐ NO
- 3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?
☐ YES ☐ NO
- 3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?
☐ YES ☐ NO

IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

TENDER NOTICE AND INVITATION TO TENDER

BID NO: AW2022/23/32

PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION

Amatola Water Board is a state-owned, South African water utility established in November 1997 and is mandated to render water services to water sector institutions, to local government and other customers in the Eastern Cape.

INVITATION AND SCOPE OF WORK

Suitably experienced and qualified service providers are invited to respond to this bid invitation for the

Bid Number	Bid Name	Scope of Work	Bid Closing Date and Time
AW2022/23/32	PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION	Amatola Water is hereby inviting all the suitably qualified bidders to provide the Procurement of Services for a Holistic Organisational Review, including Change Management and Organisational Culture Rejuvenation for Amatola Water in East London	21 November 2022 at 11:00 am

BID PUBLICATION

An open competitive bidding process is to be followed. A bid invitation will be published in the regional newspaper, Amatola Water website and National Treasury Website(e-tender). Tender documents shall be downloaded for free from the Amatola Website (www.amatolawater.co.za) on **Monday, 31 October 2022 at 09:00am.**

COMPULSORY BID CLARIFICATION MEETING

A compulsory clarification meeting with representatives of the employer will be held at **Nahoon dam, Boathouse, on Monday 07 November at 11:00am. (co-ordinates: 32°54'43.86"S 27°48'32.08"E)** Attendance and completion of the attendance register(s) is compulsory for all Tenderers. Tenderers must appear on the attendance register to be considered as being present.

Those parties arriving more than 15 minutes after the actual commencement of the briefing will not be allowed to sign the Attendance Register and we will conduct roll call at the of the briefing session. Prospective tenderers that do not attend the compulsory clarification meeting will not be allowed to tender and will be viewed as non-compliant.

EVALUATION CRITERIA

This bid will be evaluated in three (3) stages:

Stage One: Compliance Screening/ Administrative Compliance

Stage Two: Functionality

Stage Three: PPPFA

PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT (PPPFA) POINTS WILL BE AWARDED AS FOLLOWS:

Maximum points on price	-	80 points
Maximum points for BBEE	-	20 points
TOTAL	-	100 points

BIDDERS SHALL TAKE NOTE OF THE FOLLOWING BID CONDITIONS:

- The 2017 Preferential Procurement Policy Framework Act 2000 (PPPFA) principles shall apply, whereby submissions will be evaluated accordingly to the provisions of the Act.
- Broad Based Black Economic Empowerment (B-BBEE) Status will be scored in accordance with the DTI Codes of Good Practice and bidders must submit their original and valid B-BBEE status level certificate or a certificate issued by a registered auditor, accounting officer (as contemplated in section 60 (4) of the Closed Corporation Act, 1984) or an accredited verification agency in order to be eligible for B-BBEE points.
- Amatola Water does not bind itself to accept the lowest or any tender and reserves the right to accept any tender or portion of a tender.
- Tenders which are late, incomplete or submitted electronically will not be accepted.
- All tenders are to remain valid for a period of 90 days from the closing date of the submission.
- A Tax Compliance status PIN (an original valid SARS certificate) must be submitted with the tender document in order to be considered.
- Submit CSD summary report.

BID SUBMISSION

The original completed bid documents and all supporting documents (in a separate file), must be submitted in a sealed envelope or parcel endorsed with the Bid Number and Bid Description as detailed in the Tender Data. The sealed envelope must be deposited in the Bid/Tender Box located in the reception area of **Amatola House, 6 Lancaster Rd, Vincent, East London**, prior to the time and date indicated in the bid notice and the Tender Data. The bid submissions will be opened in public shortly the closing time.

BID ENQUIRIES

No telephonic enquiries relating to this tender will be entertained. All enquiries regarding this tender must be in writing only and must be directed to: Mr M Ntshoko - E-mail: mntshoko@amatolawater.co.za

Dr Linda Makuleni

Interim Chief Executive Officer

Amatola Water supports transformation through Preferential Procurement and tenders will be awarded in accordance with Amatola Water's Supply Chain Management Policy.

SPECIAL TENDER CONDITIONS

1. DEFINITIONS

The word “Bidder/Tenderer” in these conditions shall mean and include any firm of Contractors, Suppliers, Service Providers or any company or body incorporated or unincorporated.

2. BID SUBMISSION

The original completed bid documents must be submitted in a sealed envelope endorsed with the Bid Number and Bid Description as detailed in the Tender Data. The sealed envelope must be deposited in the Bid/Tender Box, located in the reception area of **Amatola Water, 6 Lancaster Road, Vincent, East London**, not later than the time and date specified on the cover page and SBD 1 of this bid.

3. PERIOD OF VALIDITY FOR BIDS AND WITHDRAWAL OF BID AFTER CLOSING DATE

All Bids must remain valid for a period of 90 (ninety) days from the closing date as stipulated in the Bid document.

4. AUTHORITY TO SIGN BID DOCUMENTS

In the case of a Bid being submitted on behalf of a company, close corporation or partnership, evidence must be submitted to the Amatola Water at the time of submission of the Bid that the Bid has been signed by persons properly authorised thereto by resolution of the directors or under the articles of the entity.

5. LATE BIDS

Bids received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where practicable, be returned unopened to the Bidder(s).

Form A must be completed. Failure to complete Form A will invalidate your bid.

6. JOINT VENTURE REQUIREMENTS

DEFINITION:- “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.

Should a group of companies/firms and/or interested parties wish to enter into a joint venture / consortium agreement the following minimum requirements must be met: -

- a. A properly signed copy of the joint venture/consortium agreement must be attached.
- b. Each member of the joint venture/consortium's taxes must be in order.
- c. After the award of a contract to a joint venture/consortium, the successful joint venture group or consortium must provide a combined joint venture/consortium Tax Clearance Certificate.
- d. After the award of a contract to a joint venture/consortium, the successful joint venture group or consortium must provide the details of the joint venture / consortium banking details.
- e. A trust, consortium or joint venture will qualify for points of their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- f. A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as

if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate tender.

THE JOINT VENTURE/CONSORTIUM AGREEMENT MUST CONTAIN THE FOLLOWING: -

- a. Who the managing member will be.
- b. Who the signatory of authority will be.
- c. How the joint venture/consortium share of profit will be split.
- d. The bank account details where payments will be deposited into.
- e. The agreement must be signed by all parties.
- f. The agreement must be certified by a Commissioner of Oaths.
- g. The postal and physical address where all correspondence will be sent to

7. OBLIGATIONS OF THE SERVICE PROVIDER:

The successful bidder and preferred service provider shall:

- 1.1 Abide by the Service Level Agreement concluded and act as a partner to Amatola Water.
- 1.2 Provide all relevant information necessary to the achievement of the above.
- 1.3 Respond within reasonable time to decisions that need be made, support required and any other matters that may need resolving in order not to delay the operations of Amatola Water.

8. CONDITIONS OF TENDER

- I. Submission of this proposal signifies the applicant's acceptance of the conditions as laid down in this document, unless clearly stated otherwise.
- II. Any expense incurred by the applicant in preparing and submitting this proposal will be for the applicant's account.
- III. Amatola Water reserves the right not to accept any proposal and cancel the bid as and when the need arises.
- IV. The contractor must provide references on Form B1, B2 and B3 that the company has undertaken projects of a similar nature.
- V. Failure to comply with the above requirements will result in submitted proposals being disqualified.

BID SPECIFICATION

PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION

1. BACKGROUND AND INTRODUCTION

Amatola Water (AW) is a state-owned water utility established in November 1997 and is mandated to render water services to water sector institutions, local government and other customers in the Eastern Cape.

The purpose of this bid is to outline the requirements and specification for the provision of services for a holistic Organisational Review, Change Management and Organisational Culture Rejuvenation for Amatola Water. Amatola Water is embarking an Organizational Development project and seeks to engage the services of a reputable and technically qualified service provider with extensive expertise in Organizational Development.

- Amatola Water is a State-owned, Water Services Enterprise established in November 1997 in terms of the Water Services Act. As a Public Utility, its prime function is to provide water services to Municipalities, industry and other communities.
- Amatola Water's service area includes Buffalo City, the Amathole District and portions of adjoining districts in the central Eastern Cape.

Amatola Water would like to solicit proposals from an Organizational Development (OD) Service Provider, comprising an OD implementation Specialist, a Remuneration Specialist, and a Change Management specialist to evaluate and review the current organisational design, structure, systems, skills, staffing and approach.

Vision: To be a leader in the provision of bulk water services in the Eastern Cape

Mission: Amatola Water strives to excel in contributing to the socio-economic development by providing bulk water services in the Eastern Cape in an ethical and sustainable manner.

Amatola Water's values are:

1. Excellence
2. Integrity
3. Accountability
4. Innovation
5. Stakeholder-focus
6. Team-orientation
7. Professionalism

Challenges: The organisation faces challenges affecting its organisational growth, financial sustainability, and stakeholder confidence.

Strategy: In response to these challenges the Board identified immediate priorities or the three pillar interventions that are the building blocks towards a sustainable organisation.

The three pillars are:

1. **First Pillar:** create a primary business focus, i.e. the provision of bulk water supply.
2. **Second Pillar:** strengthen governance
3. **Third Pillar:** restore leadership

Linked to the above are 7 strategic outcomes:

Strategic Outcomes						
SO1 Improved provision of safe and reliable water services	SO2 Effective corporate governance and ethical leadership	SO3 Improved financial viability	SO4 Improved stakeholder relations	SO5 Efficient and innovative organisation	SO6 Enhanced environmental sustainability	SO7 A highly-skilled, engaged and productive workforce

- Realizing these outcomes will see Amatola Water become a financially stable and administratively stable Water Board.

2. **OBJECTIVES OF THE PROJECT**

- Review the alignment of the organisational form and structure in line with organisational strategy and priorities.
- Development of an ideal organisational structure model for Amatola Water.
- Redesign of the Amatola Water organisational structure in alignment with existing national legislative, policy & planning frameworks and business strategy.

3. **SCOPE OF WORKS**

Organisational Review plays an integral part in enabling the execution of the above strategy; thus the business objective is the provision of a holistic organisational review, including change management and organisational culture rejuvenation at Amatola Water's Head Office and various Regional Work Sites.

The scope of work will be to provide the below at Head Office and various Regional Work Sites:

- Conduct a diagnostic review of the organisation including SWOT Analysis.
- Develop and implement an organisational review plan and framework
- Develop and implement Communication Strategy for the Organisational Review process

- Explore models for organisational effectiveness to determine the most cost-effective and strategic way to structure the organisation to meet current and future needs
- Analyse and explore systems, business processes and procedures (for HR, Fin, IT, Operations, and other relevant Divisions) and make recommendations based on the findings.
- Conduct a Culture Audit.
- Undertake and provide technical support and guidance on the review of the organisational structure to ensure alignment with strategy of Amatola Water.
- Recommend a practical, achievable, and realistic review / adjustment to the organisational structure, which should include recommendations on reporting relationships, position titles and job functions that would:
 - Clarify roles, responsibilities, and authority of management staff, including development and alignment of job descriptions, relevant qualifications and required skills.
 - Eliminate duplication and overlap of responsibilities within department and divisions
 - Improve the delivery time and quality of services provided by Amatola Water
- Present all reports and organisational structures at required management, extended management and organised labour meetings
- Support and guide Amatola Water's Job Evaluation Committee and Job Evaluation process
- Conduct job evaluation in collaboration with the Job Evaluation Committee, as required, using the Paterson or Hay job evaluation systems
- Provide written reports on job evaluation outcomes, inclusive of grade correlation to Hay and Paterson, within 2 working days of job evaluation conducted.
- Develop and implement employee migration plan
- Develop a change management and communication plan.

4. GENERAL REQUIREMENTS

- a) Travel to all Amatola Water sites
- b) Interaction with all levels of management and staff
- c) Presentations to Management and the relevant stakeholders

5. CURRENT ENVIRONMENT

Amatola Water's current staff compliment and location of staff, as below:

	Location	Location/Address	No. of Employees
1	Head Office	6 Lancaster Road, Vincent, East London	105
2	Nahoon Dam Regional Office	17 Grant Davis Road, Nahoon Dam	131
3	Laing WTW, Rooikrantz WTW and Pipeline	Kwa qonqothe village	26
4	Sandile WTW	Sandile village	11
5	Binfield WTW	Binfield Village	9
6	Masinedane WTW	Masinedane	6
7	Debenek WTW	KWT - Debe village	6
8	Peddie and Glenmore WTW	Nqwenerha Village	15
9	Albany Coast	01 Ocean View Drive, Bushman's River Mouth	12
10	Dam Management (Nahoon, Sandile, Gubu, Rooikrantz, Wriggleswade)	Nahoon Dam, Sandile Village, Stutterheim, King Williams Town, Stutterheim	15
TOTAL			336

6. SPECIAL CONDITIONS

Bidders not able to provide evidence of the following items will lead to their disqualification from evaluation.

- a) The bidder must have a minimum NQF Level 9 qualification in Organisational Development or Industrial Psychology and 10 years' experience in leading similar projects.
- b) The bidder must have ten or more years' Organisational Review and Transformation experience
- c) The bidder must have successfully completed a minimum of 3 medium to large change management and culture rejuvenation projects within the last 7 years, with contactable references. All necessary permissions to contact them and contact details to be updated, as Amatola Water may contact these references with a list of assessment questions.
- d) The bidder to provide samples of three or more similar work performed within the last 7 years
- e) The bidder to attach the following documents in the proposal/bid submission
 - i. Methodology
 - ii. Work samples
 - iii. Detailed project plan that outlines tasks, milestones, timelines, duration, and resource needs.

- iv. Certified copies of qualification and curriculum vitae must be attached for each of the team members. (We reserve the right to verify and confirm the qualifications)
- f) Bidder must possess valid registration with the SA Board for People Practices (SABPP) / the Institute of People Management (IPM) and or any other relevant Human Resources Professional Body.
- g) In case of joint ventures, an official business agreement must be submitted in the bid proposal.

7. COMMUNICATION AND REPORTING

- a) A Project Manager to be appointed by the bidder as the delegated responsible person for fulfilling the bidder's obligations, during implementation.
- b) A Project Team comprising representatives nominated by Amatola Water and the bidder, including the bidder's Project Manager shall be established, to oversee implementation progress.
- c) In this regard the bidder shall be expected to attend progress meetings, as determined by Amatola Water.
- d) The Project Team shall report to the Chief Executive supported by the HR Office.

8. TIME FRAMES

Project duration: 4 months

The expected project commencement date is Monday 16 January 2023.

Completion of the project is May 2023

The services provider is required to provide and project plan in this regard.

9. BID PRICING STRUCTURE

A pricing schedule (Annexure A) is attached, and the bidder is expected to complete and sign the pricing schedule and submit any other requested information. **(Total must be transferred to SBD 1, failure to do so will lead to the bid being disqualified)**

10. TERMS

The following terms of supply must be stated up front as they are non-negotiable and may influence your interest in becoming a Bidder to this project:

a) Acceptance Terms

To be accepted by the project team, all procurement items must be:

- i. Reviewed and approved by the office of the HR Manager.
- ii. In accordance with the scope of work defined for this project.

- iii. Delivered and 100% complete within the timeframes agreed and 4 months of commencement of the project

b) Confidentiality

During this selection process, the bidder may acquire confidential information relating to Amatola Water. A confidentiality agreement will form part of the service level agreement to be entered, by the successful bidder.

BID CRITERIA FOR EVALUATION

Bidders must submit all required documents indicated hereunder with the bid documents at the closing, date and time of the bid. During this evaluation phase, bidder's responses will be evaluated based on the documents submitted under mandatory requirements. The bid document must be completed in all respects in non-erasable ink. Bids must be submitted on original bid documents. Bid documents must remain intact and no portion may be detached. **Any bid that does not meet these requirements will be disqualified and will be considered as non-responsive.**

The received bid proposals will be evaluated in three stages to arrive to the final phase of bid award, and the phases will be as follows:

STAGE 1 EVALUATION	<u>STAGE 1 – COMPLIANCE SCREENING/ADMINISTRATIVE COMPLIANCE</u> In this phase All bids received will be verified for compliance and completeness of the submitted proposal per the below set of requirements. Bidders who fail to comply with the below requirements WILL be eliminated and bidders who comply with the below progresses to the next phase. ▪ Bid documents must be properly received on the bid closing date and time specified on the invitation. ▪ Bid documents must be properly and fully completed, dated and signed in non-erasable ink. ▪ Submission of the bid document must be in a sealed envelope clearly marked: AW2022/23/32- PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION ▪ The bid document must be completed in all respects in non-erasable ink. ▪ Bids must be submitted on original bid documents. The following declaration forms must be completed and signed in full: 1. SBD 1: Invitation to Bid 2. SBD 4: Declaration of Interest 3. SBD 6.1: Preference points claim form in terms of Preferential Procurement Regulations 2017
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	4. Certificate of Professional Registration: a) The Bidder must possess valid registration with the SA Board for People Practices (SABPP) or the Institute of People Management (IPM) or b) Any other relevant Human Resources Professional Body FORM A: AUTHORITY TO SIGN: In the case of a Bid being submitted on behalf of a company, close corporation, or partnership, evidence must be submitted to the Amatola Water at the time of submission of the Bid that the Bid has been signed by persons properly authorised thereto by resolution of the directors. The Bidders are encouraged to submit the following documents: • B-BBEE VERIFICATION CERTIFICATE/SWORN AFFIDAVIT for EMEs and QSEs where applicable • JOINT VENTURE AGREEMENT (IF APPLICABLE)		
STAGE 2 EVALUATION	<u>STAGE 2 – FUNCTIONALITY/TECHNICAL EVALUATION</u> The Functionality/Technical Evaluation is divided into two stages: ▪ A minimum of 75 points out of 100 points on technical capability will be the cut-off qualify for further evaluation of price and B-BBEE. ▪ AW will analyse and assess technical capability and therefore the bidder should demonstrate the following		
Criteria	Sub-Criteria	Weighing/ Maximum Scores	Cross-reference to response supporting
Personnel Qualification	a) The allocated Project Lead must have a minimum NQF Level 9 qualification in Organisational Development or Industrial Psychology and 10 years' experience in leading similar projects b) Curriculum vitae and certified copies of qualification(s) must be attached for each of the team members. (Amatola Water reserves the right to verify and confirm the qualifications) ▪ Post-grad at NQF level 9 or related qualification + CV and 10 or more years' experience = 25 points. ▪ Post-grad at NQF level 8 or related qualification + CV + 5 to 9 years' experience = 15 points. ▪ Post-grad at NQF level 8 or related qualification + CV + less than 5 years' experience = 10 points.	25	

	▪ None of the above requirements = 0 points.		
Previous Experience	a) The company / bidder must have five (5) or more years' Organisational Review and Transformation experience. (10 points) ▪ 5 or more years' stated experience = 10 points ▪ Less than 5 years' stated experience = 5 points. ▪ No experience = 0 points b) The company / bidder must have successfully completed a minimum of three (3) medium to large holistic organisational review projects within the last seven (7) years. (15 points) ▪ Three (3) or more medium to large holistic organisational review projects within the last seven (7) years = 15 points ▪ 2 medium to large holistic organisational review projects within the last seven (7) years = 10 points ▪ 1 medium to large holistic organisational review projects within the last seven (7) years = 5 points ▪ Zero medium to large holistic organisational review projects within the last seven (7) years = 0 points Note: Form B1, B2, and B3 must be submitted as evidence of company experience. Reference letters will not be accepted.	25	
Approach and methodology to realize the expected results	Proposed methodology to realise the expected results in line with the scope of work and objectives of the project. (25 points) ▪ Well-developed methodology that demonstrates a clear understanding of the specification and objectives of the project = 25 points ▪ Moderate methodology that demonstrates an average understanding of the specification and objectives of the project = 15 points ▪ Poor methodology that demonstrates no understanding of the specification and objectives of the project = 5 points ▪ No methodology = 0 points	25	
High level work-plan / project plan	High level work-plan with an overview of timelines, key milestones, resources and a cost breakdown indicating the major cost drivers. (25 points) ▪ Well-developed project plan that demonstrates a clear understanding of the specification and objectives of the project = 25 points	25	

	- Moderate project plan that demonstrates an average understanding of the specification and objectives of the project = 15 points - Poor project plan that demonstrates no understanding of the specification and objectives of the project = 5 points - No project plan = 0 points		
		100 points	
		75 points	

STAGE 3 PRICE AND PREFERENCE

STAGE 3 – PRICE AND PREFERENCE 80/20

Bidders are required to complete the preference claim form (SBD 6.1) and must submit their valid BBEE status level verification certificate or certified copy of sworn affidavit at the closing date and time of the bid in order to claim the B-BBEE status level points.

Only bidders who have completed and signed the declaration part of the preference claim form and who have submitted a B-BBEE status level certificate from an accredited verification agency or affidavit will be considered for preference points, failure on the part of the bidder to comply with the above will be deemed that preference points for B-BBEE status level are not claimed and therefore be allocated zero (0)

PRICE AND PREFERENCE (B-BBEE)	
Price	80
B-BBEE	20
Total Points for price and B-BBEE	100

All forms and declarations must be signed and completed and returned with the Bid Document as a whole.

Failure to sign and / or complete the forms and declarations will result in the bid being disqualified.

The lowest or any bid will not necessarily be accepted, and your bid may be accepted in part or as a whole.

The lowest or any bid will not necessarily be accepted, and your bid may be accepted in part or as a whole.

SECTION B: RETURNABLE DOCUMENTS

The following documents must be completed in full and submitted with this bid:

SBD 1: Invitation to Bid

FORM A: AUTHORITY TO SIGN DOCUMENTS

FORM B : SCHEDULE OF PREVIOUS SIMILAR CONTRACTS SATISFACTORILY CARRIED OUT BY THE TENDERER

FORM B1 must be completed, signed and stamped. No reference letters will be accepted.

FORM B2 must be completed, signed and stamped. No reference letters will be accepted.

FORM B3 must be completed, signed and stamped. No reference letters will be accepted.

SBD 4: Bidder's Disclosure

SBD 3.1: Pricing Schedule: Firm prices

SBD 3.2: Pricing Adjustments: Non- firm prices

The following documents must be submitted with this bid:

- CSD and Tax Verification PIN
- B-BBEE VERIFICATION CERTIFICATE
- JOINT VENTURE AGREEMENT (IF APPLICABLE)

FORM A: AUTHORITY TO SIGN DOCUMENTS

The person listed below are duly authorised/ delegated to sign all documents in connection with the tender offer and any contract resulting from it on our behalf by virtue of the Articles of Association/Resolution of the Board of Directors.

Details of authorised/ delegated person

--

NAME

--

SIGNATURE

--

DATE

WITNESSES:

1.

--

NAME

--

SIGNATURE

--

DATE

2.

--

NAME

--

SIGNATURE

--

DATE

FORM B: schedule of previous related contracts satisfactorily carried out by the tenderer

Service Providers should very briefly describe their experience in this regard by completing the schedule below by providing details of at **least three comparable term contracts** within the last 7 years relating to the PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION to corporate clients or public entities. All the required information requested below should be provided and a **general listing of contracts completed will not suffice.**

Comparable supply contracts of the entity within the last 5 years	Short Description	Contract Value (incl. VAT)	Dates (Commencement; Completion)	Client and contactable reference (include phone no.)

SIGNED ON BEHALF OF TENDERER:

FORM B.1: CONFIRMATION OF REFERENCES TO AMATOLA WATER

NAME OF BIDDING COMPANY:	
PREVIOUS CLIENT/EMPLOYER NAME:	
TENDER/BID NUMBER OF COMPLETED CONTRACT/PROJECT	
DESCRIPTION OF CONTRACT/ PROJECT PREVIOUSLY COMPLETED	
VALUE OF WORK COMPLETED	
DURATION AND DATE COMPLETED:	

The above-mentioned Bidding Company is in the process of submitting a Bid/RFQ for **BID number: AW 2022/23/32-PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION** for Amatola Water. If your company had prior exposure with the Bidding Company, as part of the evaluation process for this bid, Amatola Water requires your company to confirm goods/services supplied by the above Bidding Company as per below questionnaire.

1. Were the goods/ services supplied according to the required quality as per the description/specification and were delivered on time?	Select applicable rating ☐ Excellent, ☐ Good, ☐ Satisfactory, ☐ Poor
2. Kindly, indicate their overall performance on the project.	Select applicable rating ☐ Excellent, ☐ Good, ☐ Satisfactory, ☐ Poor

Full Name of Authorised Signatory

Contact Number Email address.....

Signature..... Date.....

***CLIENT (EMPLOYER) STAMP HERE**

***Incomplete and/or unsigned form will not be accepted and Amatola Water reserves the right to contact any Client Company listed as a reference. Hand-written imprints on the stamp area will not be accepted.**

FORM B.2: CONFIRMATION OF REFERENCES TO AMATOLA WATER

NAME OF BIDDING COMPANY:	
PREVIOUS CLIENT/EMPLOYER NAME:	
TENDER/BID NUMBER OF COMPLETED CONTRACT/PROJECT	
DESCRIPTION OF CONTRACT/ PROJECT PREVIOUSLY COMPLETED	
VALUE OF WORK COMPLETED	
DURATION AND DATE COMPLETED:	

The above-mentioned Bidding Company is in the process of submitting a Bid/RFQ for **BID number: AW 2022/23/32-PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION** for Amatola Water. If your company had prior exposure with the Bidding Company, as part of the evaluation process for this bid, Amatola Water requires your company to confirm goods/services supplied by the above Bidding Company as per below questionnaire.

3. Were the goods/ services supplied according to the required quality as per the description/specification and were delivered on time?	Select applicable rating ☐ Excellent, ☐ Good, ☐ Satisfactory, ☐ Poor
4. Kindly, indicate their overall performance on the project.	Select applicable rating ☐ Excellent, ☐ Good, ☐ Satisfactory, ☐ Poor

Full Name of Authorised Signatory

Contact Number Email address.....

Signature..... Date.....

***CLIENT (EMPLOYER) STAMP HERE**

***Incomplete and/or unsigned form will not be accepted and Amatola Water reserves the right to contact any Client Company listed as a reference. Hand-written imprints on the stamp area will not be accepted.**

FORM B.3: CONFIRMATION OF REFERENCES TO AMATOLA WATER

NAME OF BIDDING COMPANY:	
PREVIOUS CLIENT/EMPLOYER NAME:	
TENDER/BID NUMBER OF COMPLETED CONTRACT/PROJECT	
DESCRIPTION OF CONTRACT/ PROJECT PREVIOUSLY COMPLETED	
VALUE OF WORK COMPLETED	
DURATION AND DATE COMPLETED:	

The above-mentioned Bidding Company is in the process of submitting a Bid/RFQ for **BID number: AW 2022/23/32-PROCUREMENT OF SERVICES FOR A HOLISTIC ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT AND ORGANISATIONAL CULTURE REJUVENATION** for Amatola Water. If your company had prior exposure with the Bidding Company, as part of the evaluation process for this bid, Amatola Water requires your company to confirm goods/services supplied by the above Bidding Company as per below questionnaire.

5. Were the goods/ services supplied according to the required quality as per the description/specification and were delivered on time?	Select applicable rating ☐ Excellent, ☐ Good, ☐ Satisfactory, ☐ Poor
6. Kindly, indicate their overall performance on the project.	Select applicable rating ☐ Excellent, ☐ Good, ☐ Satisfactory, ☐ Poor

Full Name of Authorised Signatory

Contact Number Email address.....

Signature..... Date.....

*CLIENT (EMPLOYER) STAMP HERE

***Incomplete and/or unsigned form will not be accepted and Amatola Water reserves the right to contact any Client Company listed as a reference. Hand-written imprints on the stamp area will not be accepted.**

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 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:

.....

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 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 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
- 3.7 exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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.

SBD 4

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 2017

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

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

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

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

1.2 a) The value of this bid is estimated to be below R50 000 000 (all applicable taxes included) and therefore the**80/20**..... preference point system shall be applicable; or

b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.3 Points for this bid shall be awarded for:

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

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

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

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

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

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

$P_{\min}$ = Price of lowest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

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

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14

4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

5. BID DECLARATION

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

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

6.1 B-BBEE Status Level of Contributor: = (maximum of 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	☐	NO	☐
-----	--------------------------	----	--------------------------

7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	☐	NO	☐
-----	--------------------------	----	--------------------------

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at least 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:

8.2 VAT registration number:

8.3 Company registration number:

8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....
.....
.....
.....

8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding 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 bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

WITNESSES

1.

2.

.....

SIGNATURE(S) OF BIDDERS(S)

DATE:

.....

ADDRESS

.....

SECTION C:

PRICING INSTRUCTIONS, PRICING SCHEDULE AND CONTRACT

PRICE INSTRUCTIONS AND ESCALATION

The following pricing schedules must be completed in full:

SBD 3.1: Pricing Schedule: Firm prices

SBD 3.2: Pricing Schedule: Non- firm prices (Not Applicable)

NB: If there are any unconditional discount offers, kindly attach a schedule that will indicate where those discounts are applied from.

Failure to fully complete the pricing instructions will invalidate your bid. All line items should be completed.

No claim in respect of any price escalation will be considered by the Amatola Water unless it is specifically stated in the Pricing Schedule that the Bid is subject to price escalation.

When escalation is claimed for during the contract period, proof of such escalation must be furnished and the calculation itself must be submitted to corroborate such proof. Escalation will only be calculated on the official index figures supplied by the Department of Statistics or the Price Controller, which ever may be applicable.

All orders placed will be based on the current Bid prices. It is the responsibility of the Bidder to inform Amatola Water of any escalation prior to implementation of the escalated price. Failure to do so will negate any such claims.

VALUE ADDED TAX

In calculating the cost of the supply and delivery of services and / or material, the supplier will issue a "Tax Invoice" for all services rendered and / or materials supplied, which will reflect the exclusive cost of such services, goods or materials with the relevant Value Added Tax being added to the total.

VAT must be included in the Bid price but must be shown separately.

Non-VAT vendors must not include VAT in their bid price

PRICING SCHEDULE – FIRM PRICES (PURCHASES)

NOTE: PRICE ADJUSTMENTS WILL BE ALLOWED AT THE PERIODS AND TIMES SPECIFIED IN THE BIDDING DOCUMENTS.

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of Bidder.....Bid number.....

Closing Time ...**11:00am** Closing date:

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

PRICING SCHEDULE

BID NO:

AW 2022/23/32

BID NAME:

**PROCUREMENT OF SERVICES FOR A HOLISTIC
ORGANISATIONAL REVIEW, INCLUDING CHANGE MANAGEMENT
AND ORGANISATIONAL CULTURE REJUVENATION**

BIDDER NAME

Item	Description	Total
1.	Procurement of Services for a Holistic Organisational Review, including Change Management and Organisational Culture Rejuvenation	
TOTAL COSTS EXCLUDING VAT		
VAT @15%		
TOTAL COSTS INCLUDING VAT		

Total must be transferred to SBD 1, failure to do so will lead to the bid/RFQ being disqualified

Required by:

- At:
- Brand and model
- Country of origin
- Does the offer comply with the specification(s)?
- If not to specification, indicate deviation(s)
- Period required for delivery
- Delivery:

Amatola Water

.....N/A.....

.....N/A.....

*YES/NO

.....

.....

*Firm/not firm

PRICE ADJUSTMENTS

A NON-FIRM PRICES SUBJECT TO ESCALATION

1. IN CASES OF PERIOD CONTRACTS, NON FIRM PRICES WILL BE ADJUSTED (LOADED) WITH THE ASSESSED CONTRACT PRICE ADJUSTMENTS IMPLICIT IN NON FIRM PRICES WHEN CALCULATING THE COMPARATIVE PRICES

IN THIS CATEGORY PRICE ESCALATIONS WILL ONLY BE CONSIDERED IN TERMS OF THE FOLLOWING FORMULA:

$$Pa = (1 - V)Pt \left(D1 \frac{R1t}{R1o} + D2 \frac{R2t}{R2o} + D3 \frac{R3t}{R3o} + D4 \frac{R4t}{R4o} \right) + VPt$$

Where:

Pa	=	The new escalated price to be calculated.
(1-V) Pt	=	85% of the original bid price. Note that Pt must always be the original bid price and not an escalated price.
D1, D2..	=	Each factor of the bid price eg. labour, transport, clothing, footwear, etc. The total of the various factors D1, D2...etc. must add up to 100%.
R1t, R2t.....	=	Index figure obtained from new index (depends on the number of factors used).
R1o, R2o	=	Index figure at time of bidding.
VPt	=	15% of the original bid price. This portion of the bid price remains firm i.e. it is not subject to any price escalations.

3. The following index/indices must be used to calculate your bid price:

Index..... Dated.....	Index..... Dated.....	Index..... Dated.....
Index..... Dated.....	Index..... Dated.....	Index..... Dated.....

2. FURNISH A BREAKDOWN OF YOUR PRICE IN TERMS OF ABOVE-MENTIONED FORMULA. THE TOTAL OF THE VARIOUS FACTORS MUST ADD UP TO 100%.

FACTOR (D1, D2 etc. e.g. Labour, transport etc.)	PERCENTAGE OF BID PRICE

PRICES SUBJECT TO RATE OF EXCHANGE VARIATIONS

1. Please furnish full particulars of your financial institution, state the currencies used in the conversion of the prices of the items to South African currency, which portion of the price is subject to rate of exchange variations and the amounts remitted abroad.

PARTICULARS OF FINANCIAL INSTITUTION	ITEM NO	PRICE	CURRENCY	RATE	PORTION OF PRICE SUBJECT TO ROE	AMOUNT IN FOREIGN CURRENCY REMITTED ABROAD
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		

2. Adjustments for rate of exchange variations during the contract period will be calculated by using the average monthly exchange rates as issued by your commercial bank for the periods indicated hereunder: (Proof from bank required)

AVERAGE MONTHLY EXCHANGE RATES FOR THE PERIOD:	DATE DOCUMENTATION MUST BE SUBMITTED TO THIS OFFICE	DATE FROM WHICH NEW CALCULATED PRICES WILL BECOME EFFECTIVE	DATE UNTIL WHICH NEW CALCULATED PRICE WILL BE EFFECTIVE

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid .
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES

1

.....

2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I..... in my capacity as.....
accept your bid under reference numberdated.....for the rendering of services indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)

4. I confirm that I am duly authorised to sign this contract.

SIGNED ATON.....

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

WITNESSES

1
....

2

GENERAL CONDITIONS OF CONTRACT

The General Conditions of Contract (GCC) of July 2015, for Government Procurement as published by National Treasury will be applicable to this contract