

REQUEST FOR QUOTATION

RFQ NUMBER	RFQ914/65122/2021
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE DIVISIONAL MANAGER – STRATEGY AND ANALYTICS SERVICES FOR A PERIOD NOT EXCEEDING 6 MONTHS AT ITHALA DEVELOPMENT FINANCE CORPORATION LIMITED
CONTRACT PERIOD	6 MONTHS
CLOSING DATE AND TIME	21 SEPTEMBER 2021 AT 11AM
CSD No.	MAAA_____
SUBMISSION DETAILS	Email Submission: quotes@ithala.co.za <i>Late submissions will not be accepted</i>
SCM ENQUIRIES	Contact: Lungisile Zondi Tel / Email : 0319078701 / lzondi@ithala.co.za
TECHNICAL ENQUIRIES	Contact: Busisiwe Dube Tel / Email : 0319078842 / bdube@ithala.co.za

NAME OF BIDDER:.....

**All bidders must furnish the following particulars and include it in their submission
(Failure to do so may result in your quotation being disqualified)**

Name of bidder: _____

Trading Name _____

VAT registration number _____

Tax clearance status/pin submitted _____

Postal address: _____

Street address: _____

Telephone number: Code _____ Number _____

Cellular number: _____

Facsimile number: Code _____ Number _____

e-Mail address: _____

In case of a consortium/joint venture, full details on consortium/joint venture members:

Entity name _____	VAT registration number _____	Tax Clearance Status/Pin submitted _____	YES / NO _____
Entity name _____	VAT registration number _____	Tax Clearance Status/Pin submitted _____	YES / NO _____
Entity name _____	VAT registration number _____	Tax Clearance Status/Pin submitted _____	YES / NO _____

Name of contracting entity in case of a consortium/joint venture

Entity name: _____

Postal address: _____

Street address: _____

Contact details of responsible person who will act on behalf of the entity/consortium/joint venture for this bid

Contact details of alternative

Name and Surname: _____

Telephone number: Code _____ Number _____

Cellular number: _____

Facsimile number: Code _____ Number _____

e-Mail address: _____

Responsible person who will act on behalf of the person above should he/she not be available

Name and Surname: _____

Telephone number: Code _____ Number _____

Cellular number: _____

Facsimile number: Code _____ Number _____

e-Mail address: _____

Confirmation

he accredited representative in South Africa for the services offered by you:

Declaration

I/We have examined the information provided in your bid documents and offer to undertake the work prescribed in accordance with the requirements as set out in the bid document. The prices quoted in this bid are valid for the stipulated period. I/We confirm the availability of the proposed team members. We confirm that this bid will remain binding upon us and may be accepted by you at any time before the expiry date

Signature of bidder: _____

Date: _____

Are you duly authorised to commit the bidder: YES / NO

Capacity under which this bid is signed _____

A.TERMS AND CONDITIONS

1.DESCRPTION	Yes	No	Noted	If no,indicate deviation
1.1 Quotations must be delivered by the stipulated time to the correct address. Late quotations will not be accepted for consideration				
1.2 All quotations must be submitted on the official forms provided –(not to be re-typed) or online				
1.3 Quotations above R30 000 will be evaluated on the basis of the 80:20 preference point system as stipulated in the Preferential Procurement Policy Framework Act (Act number 5 of 2000)				
1.4 This quotation 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				
1.5 Ithala reserves the right to enter into negotiations with a prospective contractor regarding any terms and conditions, including price(s), of a proposed contract.				
1.6 Ithala shall not be obliged to accept the lowest or any financial offer or proposal. Furthermore, Ithala reserve the right not to award the tender to the highest ranking bidder in terms of the Preferential Procurement Policy Framework Act 2000 and the Preferential Procurement Regulations, 2017				
1.7 Ithala will disregard the bid of any bidder if that bidder or any of its directors have abused the institutions supply chain management system and or committed fraud or any other improper conduct in relation to such system.				
1.8 Ithala will list bidders / directors in the list of restricted suppliers and they will not conduct any business with an organ of state				
1.9 Tax Compliance Requirements: 1.9.1 Bidders must ensure compliance with their tax obligations. 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. 1.9.2 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. 1.9.3 In quotations where consortia / joint ventures / sub-contractors are involved, each party must submit a separate proof of tcs / pin / csd number. 1.9.4 Where no tax compliance status (tcs) or pin is available but the bidder is registered on the Central Supplier Database (CSD), a csd number must be provided.				

1.10 Ithala's business of conduct and ethics: 1.10.1 Relationships with customers and suppliers - In order to ensure that they remain objective, employees should not accept any bribes offered by any customer or supplier of Ithala, should report such offers to management and refrain from having any vested interest, financial or otherwise, with any customer or supplier. 1.10.2 Customer complaints - For any complaints regarding our supply chain management abuses please contact Ithala Customer Services at <u>031 907 8911</u> or email complaints@ithala.co.za 1.10.3 For fraud and corruption you can lodge an anonymous complaints at our toll-free hotline number 0800 004 823				
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B. ADMINISTRATIVE COMPLIANCE

<u>2.STAGE ONE: ADMINISTRATION COMPLIANCE</u>	Yes	No	Noted	If no,indicate deviation
<i>All quotations duly lodged will be examined to determine compliance with bidding requirements and conditions. Quotations with obvious deviations from the requirements/conditions, will be eliminated from further adjudication.</i> 2.1 Mandatory Quotations will be considered compliant if the following documents have been submitted or condition met (whichever is applicable) 2.1.1 The bidder must be registered as a vendor on the National Treasury Central Supply Database (CSD), which can be found at https://secure.csd.gov.za/ in compliance with National Treasury compliance paragraph 4.2 with instruction note 4a of 2016/2017 2.1.2 The bidder must be in good standing with SARS and such information will be verified through Central Supply Database (CSD) or using SARS e-filing pin in National Treasury compliance with instruction note 9 of 2017/2018 prior to the award of the bid; 2.1.3 SBD 4 - A completed and duly signed declaration of Interest. Should a conflict of interest be declared or identified, the bid would be declared non- responsive. NB Bidder must ensure all pages are complete and all questions answered, you are to indicate not applicable (N/A) where appropriate. 2.1.4 CV and qualifications of a resource/s (must meet the service requirements and qualifications) 2.1.5 Three contactable references letters Failure to provide any mandatory information as requested above will result in the submission being deemed non-responsive.				
<u>3.STAGE TWO: PRICE AND B-BBEE EVALUATION</u>				
3.1 Price and B-BBEE evaluation will be carried out on bidders who qualified in stage Stage 1				
3.2 In terms of regulation of the Preferential Procurement Regulations 2017, A bidder will qualify for preference points (where applicable). Bidders are required to submit a certified copy of their B-BBEE certificate or Sworn affidavit (attested by the Commissioner of Oaths) and/or any other supporting documentation				

4. ADJUDICATION OF BID				
4.1 The quotation shall be awarded at the sole and absolute discretion of Ithala. Ithala hereby represents that it is not obliged to award this quotation to any bidder. Ithala is entitled to retract this quotation at any time as from the date of issue. Ithala is not obliged to award this quotation to the bidder that quotes the lowest.				
4.2 A bidder shall be disqualified from bidding if any attempt is made either directly to solicit and/or canvass any information from any employee or agent of Ithala regarding this quotation from the date the offer is submitted until the date of award of the quotation.				
5. Awarding of contract				
5.1 The Ithala Service Level Agreement will be the only contract signed by both parties and will form the basis of this contract. Ithala's standard terms and conditions will not be negotiated.				
5.2 Ithala reserves the right to award this quotation in full or part				

C. TERMS OF REFERENCE

1. BACKGROUND

Ithala Development Finance Corporation (IDFC) 2020-2025 Strategic Plan consists of 6 key outcomes:

- 1.1. Increased Investment in Development Programmes and Projects by Strategic Partners;
- 1.2. Optimised Property Portfolio Supporting Industrial and Priority Sector Development;
- 1.3. Increased Contribution of Supported SMME's and Co-operatives to Socio-Economic Transformation and Job Creation;
- 1.4. Increased Access to Procurement and Funding Opportunities for KZN Residents and Enterprises from Designated Groups;
- 1.5. Effective Implementation of Development Programmes and Projects in the Province; and
- 1.6. Sustainable and High-Performing Organisation.

IDFC's strategic outcomes attest to our commitment to achieve excellence through our core functions of promoting, facilitation and support of socio-economic transformation, as well as our duty to engage and partner with our stakeholders.

In order to implement this strategy, IDFC's ICT landscape needs to grow and evolve to becoming a strategic partner to business. The roadmap therefore over the next few years is to transform ICT landscape in line with leading technology offerings and solution implementation methodologies.

2. SERVICE REQUIREMENTS

2.1. Focus Areas for this position are:-

- Strategy & Governance: Defines, analyses and documents how current and future technology will be used to meet business goals. It also describes how technology should be governed within the organisation according to best practices.
- Enterprise Architecture & Process Improvement: Identifies, analyses and improves existing business architecture and processes to optimise performance, meet best practice standards or improve the quality of user experience for customers and end-users.
- Research & Development: Performs research on new and emerging concepts, products and solutions as well as develop and perform Ithala specific use-cases on these new concepts, products and solutions.
- Data Analytics: Analyses large volumes of data and builds models for insights, trends and predictive modelling.

2.2. The scope of work is for contract Divisional Manager Strategy and Analytics service required on a six month period. The duties to be delivered by the Divisional Manager Strategy and Analytics resource are not limited to the below:

- Managing planning and operations for the divisional area;
- Co-ordinating the management of the divisional policies and practices;
- Investigating and reporting on trends and opportunities that will shape the divisional area for the future;
- Coordinate and manage the divisional budgetary process; and
- Managing divisional projects.

2.3. Mobilisation of Resources:

- The resource will take up position at IDFC's head office in Durban for the duration of the requested period.
- The service provider must ensure that the resource is mobilised on the date specified by IDFC, without negative impact to assignment at hand.
- A two (2) week notification must be provided by the service provider should a resource wish to resign or be re-allocated – a suitable replacement with the same or higher qualification and similar experience must be provided. The replacement resource must take up position at least two (2) weeks in advance to facilitate an effective handover.
- IDFC may decide to interview the resource in person or telephonically - it is up to the service provider to arrange the interview in as little time as possible to have the resource take up position in time.
- Where required, IDFC will perform reference checks of the potential resource.

2.4. Working Hours and Leave:

- Working hours are a minimum of eight and half hours (8.5) between 8AM to 4:30 PM, on weekdays (8.5 hours inclusive of 30-minute break). The resource shall follow the same working hours as IDFC employees.
- The resource may be expected to work extended hours, weekends and public holidays from time to time. This will be guided by IDFC overtime policies.
- The resource may only be required on an ad-hoc basis and may not necessarily follow IDFC's working hours. Timesheets must be produced for all ad-hoc work requirements.
- The resource is required to complete a weekly timesheet.
- Requests for leave must be submitted at least a week in advance. Leave will be governed as per manager's discretion and/or IDFC's leave policy.
- In the event the leave will impact the resource's deliverables, the service provider may be required to temporarily replace the resource in the interim. This is however not encouraged as resources are expected to deliver.

2.5. Travel

- The resource is required to have a valid South African driver's license and their own transport.
- The resource is expected to use their own transport to and from IDFC offices in and around Durban – IDFC will not reimburse resources for travel to any IDFC office within Durban.
- The resource will be reimbursed for business travel outside of Durban, at IDFC's specified travel rates.
- Although IDFC may allocate parking to resources on their premises, IDFC will not reimburse for parking costs outside its premises.

2.6. Workstations

- The resource will be allocated a workstation at the IDFC offices – comprising of a desk, chair, electrical and data connection points and a telephone handset.
- IDFC will provide a suitably equipped personal computer for the resource while on site where necessary.
- IDFC will provide access to the IDFC network, email, application systems, information repositories and network printers where necessary.

2.7. Security, Compliance and Governance

- The resource will be subject to the same health and security checks as IDFC employees where necessary.
- Physical access to IDFC premises will be provided by IDFC.

- Resource is required to produce proof of CVs and qualifications, copies of identity documents, and copies of work permits where applicable.
- The service provider and their resources are expected to comply with IDFC's information security, application and communication policies and procedures – a resource found in breach, will be subject to conditions of contract and/or legal action.
- IDFC may enforce penalties where requests for services are not been met timeously and/or of a poor quality. Penalties will be in line with the criticality of the service request and the impact that it has on business.

2.8. The following resource is required. Please attach CV and qualifications. The candidate must meet the below requirements.

Resource	Minimum qualifications, skills and experience	Experience
Divisional Manager – Strategy and Analytics	Minimum Bachelor's Degree in IT or Economics. A post graduate qualification will be advantageous.	• Minimum of five years' experience in a similar environment. • Management experience required. • Strategy development and implementation at corporate level. • Strong knowledge of enterprise architecture. • Strong knowledge or experience in data analytics and modelling. • Experience in a test-lab or R&D type environment. • Experience in innovation and product development. • Experience in developing and deploying 4IR type technologies will be a strong advantage. • Experience working in IDFC an added advantage.

3. DELIVERABLES

The assigned resource will be based at Ithala Trade Centre and utilised on a normal 8 (eight) hour working day.

4. COSTING

A breakdown of the resource/s fees inclusive of VAT is required for the duration of the contract.

5. EVALUATION CRITERIA

The assessment will be conducted at an organisational level as well as candidate level. IDFC may interview selected candidates at Ithala Trade Centre or online (Microsoft Teams). The service provider will be informed timeously when selected for the interview.

6. SUBMISSION RULES

To ensure the integrity of the process, enquiries and other communications regarding this invitation are to be directed only to the individual named by the IDFC as the contact person for this specific process. Failure to comply with this paragraph can (for this reason alone) result in the disqualification of the Service Provider/Contractor.

The appointed Service Providers/Contractors will be required to sign Non-Disclosure Agreements (NDA).

D. PRICING SCHEDULE

Item no	Description	Rate per Item	Quantity	Total Price
	Sub-Total			
	Vat			
	Total including VAT			

Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorized representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

- 1.1 Full Name of bidder or his or her representative:
- 1.2 Identity Number:
- 1.3 Position occupied in the Company (director, trustee, shareholder²):
- 1.4 Company Registration Number:
- 1.5 Tax Reference Number:
- 1.6 VAT Registration Number:

- 2.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

¹"State" means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) National Assembly or the national Council of provinces; or
- (e) Parliament.

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

- 2.2 Are you or any person connected with the bidder presently employed by the state?

YES / NO

- 2.2.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed:

.....

Position occupied in the state institution:

Any other particulars:
.....
.....
.....

2.2.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.2.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.2.2.2 If no, furnish reasons for non-submission of such proof:
.....
.....
.....

2.2.3 Did you or your spouse, or any of the company's directors / trustees/ shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.2.3.1 If so, furnish particulars:
.....
.....
.....

2.2.4 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.2.4.1 If so, furnish particulars.
.....
.....
.....

2.2.5 Are you, or any person connected with the bidder, Aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.2.5.1 If so, furnish particulars.
.....
.....
.....

2.2.6 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.2.6.1 If so, furnish particulars:
.....
.....
.....

3. 1 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee Number Persal Number

DECLARATION

I, THE UNDERSIGNED (NAME).....

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE
GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidd