

Appointment of a Service Provider to review and amend policies and develop new policies and their related SOPs

RFQ Reference NO: FAS/FIN/02/2025	
Description	Policy Review and Development
Address	Iziko South African Museum, 25 Queen Victoria Street, Cape Town, 8001
Attention	Ronell Pedro
Site	Iziko South African Museum
Advert Date	18 March 2025
Closing date and time for submission	25 March 2025 11:00AM
Method of delivery	Quotes / Proposals, and accompanying documentation, must be emailed to : rpedro@iziko.org.za and ndonson@iziko.org.za
Technical enquiries	Ronell Pedro, rpedro@iziko.org.za 021 481 3809
Name of Company	
CSD Supplier Number (MA.....Number)	
B-BBEE Status Level of Contribution	
Quote Price (Incl Vat)	
Signature	

Appointment of a Service provider to review and amend of 6 existing policies and their related Standard Operating Procedures (SOPs) as well as to develop of 3 new policies and their related SOPs.

1. PURPOSE

The purpose of this request for quote is to invite suitably qualified service providers to review and amend of 6 existing policies and their related Standard Operating Procedures (SOPs), align 1 policy as well as to develop 3 new policies and their related SOPs in 2 phases as follows:

1. Review and amend of 6 existing policies and their related Standard Operating procedures (SOPs) to be completed by no later than 8 April 2025
2. The review of the Iziko HR Staff travel, accommodation and subsistence policy and align it to National Treasury's travel policy framework and develop 3 new policies and their related SOPs by no later than 30 September 2025

2. BACKGROUND

Iziko Museums of South Africa (Iziko) is a Schedule 3A Public Entity and an agency of the national Department of Sport, Arts and Culture (DSAC), bringing together the national museums of the Western Cape under a single governance and leadership structure.

Iziko has developed 6 Finance policies which were discussed in a workshop with the Finance and Advancement Committee of Iziko's Council.

Based on feedback from the workshop, the 6 Finance policies need to be reviewed, procedural matters extracted, and standard operating procedures related to these policies need to be developed. The work related to this phase (Phase 1) should be completed by 8 April 2025, in time for presentation to the Finance and Advancement Committee and Council meetings towards the end of April 2025.

In addition to the policies above, 3 new policies need to be developed, and the existing HR Travel and Subsistence policy need to be aligned to National Treasury's Travel Framework in Phase 2.

3. SCOPE OF WORK

The work entails a revision of the existing policies based on feedback as well as a policy review report. In addition, new policies need to be developed, and a policy alignment exercise must be performed, which will result in changes to the existing policy.

The work further entails developing standard operating procedures aligned to each of the policies using existing SOPs, which are required to be reviewed and updated.

3.1 Policies for Review (Phase 1)

1. Asset Management Policy
2. Bank, Cash and Investment Policy
3. Compliance Policy
4. Credit Control and Debt Collection
5. Heritage Asset Management Policy
6. Supply Chain Management Policy

3.2 Policies for Alignment (Phase 2)

The review of the Iziko HR Staff travel, accommodation and subsistence policy and align to National Treasury's published travel policy framework

3.2 Policies for Development (Phase 2)

1. Financial Delegations of Authority
2. Budget
3. Revenue and Refund Policy

3.3 Development of Standard operating procedures (Both Phases 1 and 2)

Review of existing standard operating procedures and ensure their alignment to the policies reviewed or developed above.

4. SERVICE PROVIDER REQUIREMENTS AND COMPETENCIES

Iziko requires clear, concise, relevant to the target audience, easily understandable, aligned with current laws which are specific about what actions are allowed and prohibited. The policies should follow a consistent format and must be well-structured. Specifically, the policies should not be procedural and must be aligned to the Public Finance Management Act (PFMA) and National Treasury regulations, guidelines and other prescripts. The current procedures should be assessed and revised to reflect Iziko’s specific context and workplace culture. Additionally, the procedures must be updated to meet the latest relevant legislative framework and all the requirements outlined in the related policy.

The Service provider should have:

- Knowledge of National Treasury regulations as they relate to the different policies
- Proven experience and knowledge of Policy and procedure development
- Adequate capacity to complete phase 1 by 8 April 2025
- Adequate capacity to complete phase 2 by 30 September 2025

What We Expect the Service Provider to Do:

1. **Develop Clear and Concise Policies:** The policies should be written in a straightforward and easy-to-understand manner, ensuring that they are relevant to the target audience at Iziko.
2. **Ensure Alignment with Current Laws:** The service provider should ensure that all policies are aligned with current laws, specifically the Public Finance Management Act (PFMA), National Treasury regulations, and other relevant guidelines or prescripts. This includes specifying actions that are allowed and prohibited.
3. **Create Non-Procedural Policies:** The policies should not include procedural details but should focus on the principles and regulations governing actions within the institution.
4. **Maintain Consistency and Structure:** The service provider should ensure that the policies are consistent in language and well-organised, with a clear structure that makes them easy to follow.
5. **Assess and Revise Existing Procedures:** The service provider should review the current procedures to ensure they reflect Iziko’s unique context and workplace culture, making necessary revisions where required.
6. **Ensure Compliance with Policy Requirements:** The service provider should ensure that the revised procedures meet all the necessary requirements as outlined in the policy document.

5. Consortiums/Joint ventures

Service Providers may assume any number of forms including (but not restricted to) a consortium/joint venture that draws on multiple disciplines, practices and experiences. Each party to a consortium/joint venture must comply with the requirements of this request to quote. It is also strongly recommended that in selecting their partners, consortia consider “smaller” but capable organisations which, while strengthening the proposal, will also receive some developmental benefit from partnering with larger organisations. In the event the selected proposal is a consortium/joint venture, the contract will be signed with the lead organisation, which must be identified in the proposal.

6. Duration

The successful bidder will be expected to be available for commencing the project from the date of signing of the agreement by the last party.

7. Risk Assessment and Due Diligence

To ensure a comprehensive evaluation of all potential risks arising from the appointment of any bidder, Iziko may seek external assistance to provide assurance that the appropriate bid is selected. Iziko also reserves the right to conduct a thorough due diligence review on any relevant aspects of a bidder’s proposal to confirm compliance with all required standards and mitigate any potential risks.

8. Bidding Stages

The Service Provider must comply with Iziko’s Supply Chain Management policies and procedures by submitting the required documents.

The bidding requirements and stages are summarised in the table below:

Table 1: Bidding requirements and stages

Stage 1- Administrative Documents	Stage 2 - Functionality Criteria	Stage 3 - Price and Specific Goals
Bidders must submit all documents as outlined in Table 2: Administrative Documents . Note: Failure to supply any of the administrative documents stipulated below <u>may lead to disqualification</u> Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete administrative documents	Bidders are required to achieve a minimum of 70% on functionality criteria to proceed to the next stage Refer Table 3 – Required documents to enable functionality scoring. Note: Failure to supply any of the administrative documents stipulated below <u>may lead to disqualification</u> Bidders will be given three (3) working days and one opportunity in which to submit any missing or incomplete documents	Bidders that meet the minimum threshold for functionality will be evaluated based on Price & Preferential Procurement Specific Goals Evaluation Criteria as indicated in Table 4: Price – 80 points Specific Goals– 20 points

Table 2: Administrative Returnable Documents

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid to be rejected.

Order	Documents required
1.	Central Supplier Database Report– with supplier number and company details (www.csd.gov.za) and Tax Status Verification Pin together with tax registration number CSD Provided should not be older than date of RFQ advertisement
2.	Completed SBD 1 - Invitation to Bid
3.	Completed SBD 3.3 - Pricing Schedule Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement and escalations, if applicable, etc. for the entire duration of the proposed contract must be provided
4.	Completed SBD 4 – Bidder's Disclosure
5.	Completed SBD 6.1 - Preference Points Claim Form (Preferential Procurement Regulations 2022)

Table 3: Documentation for Functionality Scoring

If any of the required documents are not included in the bid, bidders will be requested in writing to submit the documents within three (3) working days and failure to do so by the third working day, will result in the relevant bid to be rejected.

No.	In order to score the bid for functionality, the proposal should include the following:
1	A listing of examples of past projects
2	The CV at least one key member indicating their experience in similar projects and knowledge of policy development, specifically Finance or Supply Chain policies.
3	A project Plan or Methodology indicating the approach, timelines, and key milestones
4	An example of policies or SOPs from previous projects, particularly in similar organizations.
5	An overview with a description of experience with an institution of similar to Iziko to indicate a familiarity with the specific needs, challenges, and culture of Iziko or similar heritage/cultural institutions

9. Preference Points Claim

In terms of Regulation 4 of the Preferential Regulations pertaining to the Preferential Procurement Policy Framework Act 2000 (Act 5 of 2000) Preferential Procurement Regulations, 2022 responsive bids will be adjudicated by the state on the

80/20 preference point for Specific goals in terms of which points are awarded to the bidders on the basis of price and specific goals, as follows:

Table 4: Price and Specific Goals

Preference Point Criteria	Points Allocation
Price	80
Specific Goals A Valid B-BBEE certificate or Sworn Affidavit; Company Registration Certification Identification Documentation of shareholders. Latest CSD report Ownership by HDIs (Who had no franchise on national elections before the 1983 and 1993 constitution) 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points	20
TOTAL POINTS	100

10. Functionality

Proposals must score an overall minimum of 70% (70 points) for functionality criteria to qualify for further evaluation for preference points.

Functionality Criteria	Points Allocation	Value
1. Experience	25	
2. Knowledge and qualifications of key team members	25	
3. Methodology and Approach	25	
4. Familiarity with Iziko or Similar Entities in the Heritage Sector	25	
Sub Total	100	
Minimum Stipulated Threshold to be met	70 points (70%)	

DETAILED FUNCTIONALITY EVALUATION CRITERIA												
NO.	CRITERION	DESCRIPTION		SCORE								
1.	Experience Proven experience in reviewing, amending, and developing policies and SOPs	A listing of examples of past projects The list should contain the value; exact nature of work performed, the duration of the project, as well as the details of a key contact person where the project was undertaken, preferably in tabular form as follows: <table border="1"><tr><td>Client Name and contact details</td><td>Period</td><td>Value</td><td>Project Description</td></tr><tr><td></td><td></td><td></td><td></td></tr></table> Iziko reserves the right to verify the validity of the information. (Max 25)		Client Name and contact details	Period	Value	Project Description					
		Client Name and contact details	Period	Value	Project Description							
No listing/listing does not contain contact details and/or details of projects, values and duration as stated above		0										

		1-3 instances of similar work done with client contact details	10	
		4-5 instances of similar work done with client contact details	25	
2.	Knowledge and qualifications of key team members Submit the; CVs and qualifications of key members of the project team to indicate desired level of experience and knowledge of policy development, specifically Finance or Supply Chain policies.	Provide: 1. The CV at least one key member indicating their experience in similar projects and knowledge of policy development, specifically Finance or Supply Chain policies. 2. Qualifications of key team member(s) listed above (Max 25)		
		CV('s) of key team member(s) not provided and/or the CV('s) indicate 1 to 2 years' and/or Qualifications of listed key team member(s) not provided or not relevant	0	
		The CV('s) of key team member(s) indicate more than 2 years but less than 5 years' experience in similar projects and key team member(s) have the required qualifications	10	
		The CV('s) of key team member(s) indicate more than 5 years' experience in similar projects and key team members(s) have the required qualifications	25	
3	Methodology and Approach A clear, structured approach that ensures policies and SOPs are tailored to Iziko's unique context and the Heritage sector, with stakeholder engagement and legal compliance.	Project Plan or Methodology Document and Example of past deliverable Please provide 1. A project Plan or Methodology indicating the approach, timelines, and key milestones and 2. An example of policies or SOPs from previous projects, particularly in similar organizations. (Max 25)		
		No plan is provided, or the plan is generic, unclear and vague or no examples are provided	0	
		A plan and 1-2 suitable and relevant example provided	10	
		All 3 of the above points are covered in a detailed and well-structured approach and 3 or more suitable and relevant examples are provided	25	
4.	Familiarity with Iziko or Similar Entities in the Heritage Sector Familiarity with the specific needs, challenges, and culture of Iziko or similar heritage/cultural institutions	The service provider should demonstrate knowledge of the sector's unique needs and how they would tailor policies and SOPs to suit. Using the listing of examples of past projects, and provide a short description of any experience with an institution similar to Iziko to demonstrate familiarity with the specific		

		needs, challenges, and culture of Iziko or similar heritage/cultural institutions		
		Iziko reserves the right to verify the validity of the information (Max 25)		
		No overview describing experience in similar institutions	0	
		3 instances of similar work done	10	
		4 instances of similar work done	25	
		Total Points	100	
		Minimum Stipulated Threshold to be met	70 points (70%)	

Note: Only proposals meeting the Minimum Stipulated Threshold of 70% of the Functionality Evaluation will be considered for further evaluation for 80/20 Preference Points

11. Price

Price is an important factor as it ensures optimum value for money and Total Cost to Iziko and should take into account the full duration of the contracting period.

Please complete SBD 3.3 below. A cost schedule detailing hourly rates, inclusive of VAT, any disbursements and escalations, if applicable, etc. for the entire duration of the proposed contract may also be provided.

12. Validity Period

Offer to be valid for 90 working days from the bid closing date.

13. Formal Contract

- The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider.
- A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider.

14. Reasons for disqualification

Iziko reserves the right to disqualify any submission in the event of any one or more of the following:

- The Bidder submitted their proposal late;
- The Bidder did not submit proof of CSD registration
- The Bidder did not submit complete documentation or fails to provide the documentation /information within the requested timeframes
- The Bidder submits information that is fraudulent, factually untrue or inaccurate;
- The Bid did not meet the required minimum stipulated threshold points.

15. SUMMARY OF GENERAL PRINCIPLES

- Iziko will apply the 80/20 preferential points system.
- Iziko applies the provisions of the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and the Public Finance Management Act, 1999 (Act No. 1 of 1999).
- The lowest or only proposal received will not necessarily be accepted.
- Iziko reserves the right to withdraw its decision to seek the provision of these services at any time.
- Iziko reserves the right to appoint consultants to assist with technical and risk assessments of bids.
- Iziko reserves the right to obtain clarification from a bidder on any matter that could give rise to ambiguity in a contract arising from the bid proposal
- Iziko reserves the right to request and accept changes to a proposal from a successful bidder at any time, as long as it complies with legal and administrative requirements

- Iziko reserves the right to request the administrative returnable documents after the closing date and time in instances where the Bidder has not returned the documents. However, Iziko is under no obligation to request such documents or information and may elect to disqualify the Bidder that has not returned the requisite document.
- There will be no discussions with any bidder until a final decision has been taken by the Bid Adjudication Committee. Any subsequent discussions shall be at the discretion of Iziko.

16. Delivery Approach

The successful applicant shall commence with business on a date agreed to by both parties.

17. Submission of Bids

Closing date and time: Refer to page 1 above.

The submission should be in the form of an electronic version of all documentation in the proposal.

Facsimiles, and late bids will not be accepted.

Interested Bidders are expected to submit returnable documents on the original Request to Quote document issued by Iziko and completed in black ink.

WRITTEN OR TELEPHONIC QUERIES MUST BE DIRECTED TO:

Ronell Pedro

Chief Financial Officer

Iziko Museums of South Africa

Switchboard: +27 21 481 3800

Direct Line; +27 21 468 3807

E-Mail: rpedro@iziko.org.za



Signature: _____

Ms. Ronell Pedro

Chief Financial Officer

ANNEXURE A: PRICING SCHEDULE

A detailed and Comprehensive Pricing Schedule must be submitted, using the table below as a guideline

1. Clearly indicate rates for each type of service, specifying the applicable unit
2. The number of hours required will be determined by the volume of work.
3. The pricing structure must be inclusive of VAT
4. Any disbursements and escalations must be indicated separately.

Designation/Description of Service	Rate per Hour	Total Hours (	Total Cost (R)
1. Policies for Review (Phase1)			
Asset Management Policy			
Bank, Cash and Investment Policy			
Compliance Policy			
Credit Control and Debt Collection			
Heritage Asset Management Policy			
Supply Chain Management Policy			
2. Policies for Alignment (Phase 2) The review of the Iziko HR Staff travel, accommodation and subsistence policy and align to National Treasury's published travel policy framework			
3. Policies for Development (Phase 2)			
Financial Delegations of Authority			
Budget			
Revenue and Refund Policy			
4. Development of Standard operating procedures (Both Phases 1 and 2) Review of existing standard operating procedures and ensure their alignment to the policies reviewed or developed above.			
TOTAL			
VAT			
TOTAL INCL VAT			

ADMINISTRATIVE DOCUMENTS

PART A

INVITATION TO BID

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

BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
-------------	--	---------------	--	---------------	--

DESCRIPTION	
-------------	--

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

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO

TECHNICAL ENQUIRIES MAY BE DIRECTED TO:

CONTACT PERSON		CONTACT PERSON	
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS		E-MAIL ADDRESS	

SUPPLIER INFORMATION

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

SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
----------------------------	----------------------------	--	----	-------------------------------	------

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
--	--	---	--

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?

☐ YES ☐ NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA?

☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?

☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?

☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

☐ YES ☐ NO

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

PART B
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 IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

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

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: BID NO.:

CLOSING TIME 12:00

CLOSING DATE.....

OFFER TO BE VALID FORDAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
------------	-------------	--

- The accompanying information must be used for the formulation of proposals.
- Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.
- Bidders are required to complete the pricing/ costing schedule in **Annexure B**.
- PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

PERSON AND POSITION	HOURLY RATE	DAILY RATE

- PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

-----	R-----	----- days
-----	R-----	----- days
-----	R-----	----- days
-----	R-----	----- days
-----	R-----	----- days
-----	R-----	----- days

6.1 Travel expenses (specify, for example rate/km and total km, class of air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
	R		R
	R		R
	R		R
	R		R
	R		R
	R		R
TOTAL	R		R

****” all applicable taxes” includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.**

6.2 Other expenses, for example accommodation (specify, e.g. Three-star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
	R		R
	R		R
	R		R
	R		R
TOTAL	R		R

Period required for commencement with project after acceptance of bid

6. Estimated man-days for completion of project

7. Are the rates quoted firm for the full period of contract? *YES/NO

8. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

.....

.....

*

[DELETE IF NOT APPLICABLE]

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 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 (Company Name)

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.

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

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

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

1. GENERAL CONDITIONS

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

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

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

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

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

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

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

The maximum points for this tender are allocated as follows:

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

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

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

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue

for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) “the Act” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Evidence	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of race	• Proof of B-BBEE certificate and/or; • Company Registration Certification and/or • Copies of Shareholders IDs		
Race: Black persons (ownership)* 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points			

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....