



REQUEST FOR QUOTATIONS

RFQ NUMBER: RFQ/SASSETA/2627108

CLOSING DATE: 30 July 2026

TIME: 11H00

DESCRIPTION: Appointment of a Facilitator for SASSETA Strategy Sessions (Exco, Manco and Board) and ad hoc workshops from the date of appointment to 31 March 2028

COMPULSORY BRIEFING: Yes ☐ No ☒

FOR COMPLETION BY SERVICE PROVIDER:

NAME OF BIDDING COMPANY: _____

CONTACT PERSON: _____

CONTACT NUMBER: _____

CSD REGISTRATION NUMBER: **MAAA**_____

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NB: If you receive any suspicious calls asking for payment to secure an award or that the outcome can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigations.

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

1. Terms of references
2. Invitation to Quote (SBD 1) (requires the attachment of proof of authority)
3. Pricing Schedule (SBD 3.3)
4. Bidder's Disclosure (SBD 4)
5. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1)
6. Documents required for claiming Specific Goals
7. Submission Checklist
8. Annexure A (GCC)

NB.: DOCUMENT SUBMISSION

Bidders are to complete and submit all Standard Bidding Documents (SBD) forms mentioned above from bullet 2 to 5.

Bidders must be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with their CSD registration number.

1. TERMS OF REFERENCE

1.1 INTRODUCTION

- 1.1.1 The Safety and Security Sector Education and Training Authority (SASSETA) is one of the 21 sector education and training authorities in South Africa. SASSETA is responsible for skills development and implementation within the safety and security sector. Its mandate is drawn from the Skills Development Act, the National Skills Development Strategy, and other subsidiary legislative frameworks. It is a national public entity listed in schedule 3A of the Public Finance Management Act.
- 1.1.2 The National Treasury Regulations, Skills Development Act and the Public Finance Management Act stipulate that public entities, such as SASSETA, need to develop five-year Strategic Plans and Annual Performance Plans listing their achievable targets. Furthermore, they must report quarterly to the Executive Authority on performance against the Annual Performance Report Plan (APP).

1.2 BACKGROUND

- 1.2.1 SASSETA's governance structures and management undertake annual reviews of the organisation's strategic documents, making amendments where necessary. The process is facilitated by independent external experts to promote objectivity, transparency, and robust stakeholder engagement.

1.3 PURPOSE

- 1.3.1 SASSETA requires a suitable and experienced facilitator for the Exco, Management, Board strategic planning sessions and workshops.
- 1.3.2 SASSETA will execute the strategic planning sessions and workshops using the following approach:
 - 1.3.2.1 Facilitation of an Exco Strategy Session
 - 1.3.2.2 Management (Manco) planning session
 - 1.3.2.3 Board planning session
 - 1.3.2.4 Exco / Manco / Board Workshops

1.4 SCOPE OF WORK

- 1.4.1 The bidder is required to provide a proposal, for the facilitation of the planning sessions, in compliance with the below scope of work:

1.4.1.1 Exco-Level Planning (1 day for briefings, 2 days for session)

- 1.4.1.2 Conduct a 2-hour briefing session with the CEO in preparation of the Exco Planning session, and 2-hour session with each of the other 5 Executive Managers. The meeting to be face-to-face or virtually.
- 1.4.1.3 Peruse documentation relevant to the assignment in preparation for the Strategic Planning Session.
- 1.4.1.4 Study the achievements, constraints, challenges, and risks facing SASSETA and the safety and security sector in the last few years.
- 1.4.1.5 Benchmark with other institutions of similar architecture and mandate and identify best practices.
- 1.4.1.6 Facilitate the Exco Strategic Planning Session to be held in August and apply strategies to solicit constructive discussions to ensure that the objectives are met.

1.4.1.7 Management-Level Planning (3 hours for briefing and 3 days session)

- 1.4.1.8 Conduct a 3-hour briefing session with the Executives in preparation of the Management Planning session. The meeting to be face-to-face or virtually.
- 1.4.1.9 Peruse documentation relevant to the assignment in preparation for the Strategic Planning Session.
- 1.4.1.10 Study the achievements, constraints, challenges, and risks facing SASSETA and the safety and security sector in the last few years.
- 1.4.1.11 Benchmark with other institutions of similar architecture and mandate and identify best practices.
- 1.4.1.12 Facilitate the Management Strategic Planning Session to be held in early September and apply strategies to solicit constructive discussions to ensure that the objectives are met.
- 1.4.1.13 Edit the revised strategic plan, and annual performance plan on the basis of the discussions at the Management Strategic Planning sessions for approval by SASSETA. The draft plan is due to the Department of Higher Education and Training on 15 September. The service provider to deliver the draft plans by 10 September.

1.4.1.14 Board-Level Planning

- 1.4.1.15 Conduct a briefing session with the Executives and the Chairperson of the Board in preparation of the Board Planning session. The meeting to be face-to-face or virtually.
- 1.4.1.16 Facilitate the Board Strategic Planning Session and apply strategies to solicit constructive discussions to ensure that the objectives are met.
- 1.4.1.17 Edit the revised strategic plan, and annual performance plan on the basis of the discussions at the planning sessions and make provision for a minimum of 2 drafts prior to finalisation and approval by SASSETA. The final plan is due to the Department

of Higher Education and Training on 30 November. The service provider to deliver the final plans by 20 November.

- 1.4.1.18 Prepare final report on the strategic planning session as a reflection of the proceedings including action plan and recommendations within three weeks of the end of each session.

1.4.1.19 Exco / Manco / Board Workshops (on an ad-hoc basis)

- 1.4.1.19.1 Conduct a briefing session with the relevant representatives in preparation of the workshop. The meeting to be face-to-face or virtually.
- 1.4.1.19.2 Facilitate the workshop and apply strategies to solicit constructive discussions to ensure that the objectives are met.
- 1.4.1.19.3 Prepare final report on the workshop as a reflection of the proceedings including action plan and recommendations within three weeks of the end of each session.

1.5 REQUIRED DELIVERABLES

1.5.1 The bidder must:

- 1.5.1.1 Provide a methodology in full compliance to the scope of work.
- 1.5.1.2 Facilitate the Exco, Manco and Board planning sessions and workshops.
- 1.5.1.3 Edit the revised strategic plan, and annual performance plan on the basis of the discussions at the planning sessions and make provision for a minimum of 2 drafts prior to finalisation and approval by SASSETA. The draft plan is due to the Department of Higher Education and Training on 15 September and the final on 30 November. The service provider to deliver the final plans by 20 November.
- 1.5.1.4 Prepare final report per session as a reflection of the proceedings including action plan and recommendations, within three weeks of the end of each session.

1.6 SKILLS AND EXPERIENCE OF THE BIDDING COMPANY AND THE TEAM MEMBERS PROPOSED FOR THE ASSIGNMENT

- 1.6.1.1 The Bidding company to submit a detailed project plan with details on how various activities will be scheduled and executed with timelines, the team leader +1 must clearly outline the responsibilities for the activities in line with the scope of work.
- 1.6.1.2 The Bidding Company has undertaken a minimum of three (3) strategic planning assignments. Reference letters should be signed, dated, and drafted on a company letterhead. Refer to the evaluation criteria for detailed requirements.
- 1.6.1.3 The Facilitator to have a minimum of three (3) assignments in facilitating management/leadership strategic planning sessions. Comprehensive CV of the Facilitator to be attached highlighting the skills, roles, and responsibilities.

1.7 TIMEFRAMES FOR DELIVERY OF THE WORK

- 1.7.1 The scope of work to be conducted from date of appointment to 31 March 2028.

1.8 PRICING

- 1.8.1 Service Providers are requested to provide an all-inclusive cost of this assignment in line with the provided SBD 3.3.

1.9 ACCOUNTABILITY AND REPORTING

- 1.9.1 The service provider will report directly to the Chief Executive Officer (CEO) for the duration of the assignment.

1.10 INTELLECTUAL PROPERTY

- 1.10.1 The service provider will be contracting with SASSETA. All products and data of this project, in whatever format raw or analysed, will be confidential information for utilisation by SASSETA. All information and documents received from SASSETA, is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the Contract.

1.11 SUBMISSION OF THE GENERAL CONDITIONS OF CONTRACT (GCC)

- 1.11.1 Bidders are requested to initial each page of the General Conditions of Contract (GCC) (Annexure A) and submit their response to this Request for Quotations. The GCC will form part of the contract with the successful Bidder.

1.12 INTELLECTUAL PROPERTY

- 1.12.1 The service provider will be contracting with SASSETA. All data of this project, in whatever format raw or analyzed, will be confidential information for utilisation by SASSETA. All information and documents received from SASSETA is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the SLA.

1.13 PROTECTION OF PERSONAL INFORMATION ACT

- 1.13.1 All Service Providers are to take note of the implications of POPI Act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:
 - 1.13.1.1 All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.
 - 1.13.1.2 The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA

records management policies as prescribed by the National Archives Act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.

1.13.1.3 SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of the information provided.

1.13.1.4 SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

1.14 PROPOSED SELECTION CRITERIA

1.14.1 Functionality Evaluation

1.14.1.1 All proposals will be evaluated on the criteria provided in the table below. The proposals of all service providers will be rated on a scale of 0 to 2.

0: Required document/item not submitted.

1: Acceptable. Meets the minimum criteria.

2: Exceptional mastery of the requirement should ensure extremely effective performance.

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
Suitability of the bidding company to undertake the assignment	Rating out of 2	Evaluation criteria		
The Bidding company to submit a detailed project plan with details on how various activities will be scheduled and executed within clear timelines, the team members responsible for the activity in line with the scope of work. (20 points)	0	The Bidding Company did not submit a detailed project plan as to how various activities will be scheduled and be executed.	20%	
	1	The Bidding Company submitted a project plan with details on how various activities will be scheduled and executed,		
	2	The Bidding Company submitted a project plan with details on how various activities will be scheduled and executed within clear timelines, the team members responsible for the activity in line with the scope of work.		
The Bidding Company has undertaken a minimum of three (3) strategic planning assignments. Reference letters should be signed, dated, and drafted on the client's company letterhead. (40 points)	0	Bidding Company did not submit signed reference letters on an official letterhead from three (3) contactable referees, dated demonstrating skills and expertise to undertake strategic planning assignments /less than three (3) reference letters submitted) where strategic planning assignments were undertaken.	40%	
	1	The Bidding Company submitted three (3) signed reference letters demonstrating strategic planning assignments. Reference letters are signed, dated, and drafted on the client's company letterhead.		
	2	The Bidding Company submitted four (4) or more signed reference letters demonstrating strategic planning assignments. Reference letters are signed, dated, and drafted on the client's company letterhead.		

The Bidding company to submit a CV of the Facilitator demonstrating a minimum of three (3) assignments in facilitating management/leadership strategic planning sessions. Comprehensive CV of the Facilitator to be attached highlighting the skills, roles, and responsibilities. (40 points)	0	The Facilitator does not have any relevant experience/has less than three (3) assignments in facilitating management/leadership strategic planning sessions.	40%	
	1	The CV of the Facilitator demonstrating three (3) assignments undertaken in facilitating management/leadership strategic planning sessions and highlights the skills, roles, and responsibilities.		
	2	The CV of the Facilitator demonstrating four (4) or more assignments undertaken in facilitating management/leadership strategic planning sessions and highlights the skills, roles, and responsibilities		
TOTAL POINTS			100%	

N/B: Bidders need to score:

- a minimum of 70% for functionality to be evaluated further on the 80/20 preference point system.
- one (1) on each element above. Bidders who do not score one (1) on any of the elements will be disqualified from further evaluation.

1.15 PREFERENCE POINT SYSTEM

Evaluation Criterion on Price and Specific Goals	
Relative competitiveness of proposed price	80
Specific Goals	20
TOTAL FOR PRICE AND PREFERENCE	100

1.16 CONDITIONS FOR SELECTION/SHORTLISTING

- a. Price quoted to be valid for ninety (90) days from the closing date of RFQ;
- b. The quotations are to be submitted in PDF Format;
- c. The quotation to include the National Treasury Central Supplier Database (CSD) Supplier Number (MAAA)
- d. Price quoted must be firm and must be inclusive of VAT;
- e. A firm delivery period/date must be indicated;
- f. Fully signed and completed SBD 1, 3.3, 4, 6.1, to be submitted with the proposal.
- g. Quotations will be evaluated on:
- h. Submission of mandatory documents,
 - Functionality requirements above,
 - meeting the specifications issued by the SASSETA,
 - The 80/20 preference point system for the rand value up to R1 000 000.00. 80 points will be allocated to price and 20 points will be allocated to specific goals.

SASSETA issues this bid invitation in good faith; however, it reserves the right to:

- Cancel the Purchase Order or delay the selection process at any time, without explanation,
- Not to select any of the respondents to this bid invitation, without explanation,
- Exclude certain services, without explanation,
- Enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract, and
- Not to accept the lowest of any quotation, offer, or bid.

1.17 ADDRESS WHERE QUOTATIONS ARE TO BE SENT

- 1.17.1 The quotation and all supporting documents are to be submitted no later than **(30 July 2026)** at **(11H00)** on the letterhead of your business and to be emailed to **(klegodi@sasseta.org.za)**

PART A - INVITATION TO QUOTE

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFQ/SASSETA/26267108	CLOSING DATE:	30 July 2026	CLOSING TIME:	11H00
DESCRIPTION	Appointment of a Facilitator for SASSETA Strategy Sessions (Exco, Manco and Board) and ad hoc workshops from the date of appointment to 31 March 2028				
BID RESPONSE DOCUMENTS MAY BE SENT TO:					
klegodi@sasseta.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Koena Legodi		CONTACT PERSON	Koena Legodi	
E-MAIL ADDRESS	klegodi@sasseta.org.za		E-MAIL ADDRESS	klegodi@sasseta.org.za	
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
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX]		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX]	
	Yes No			Yes No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN (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]	
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. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION. 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. 3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. 4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
1. BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS. 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. 3. APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA . 4. BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID. 5. IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER. 6. WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED. 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.

NAME OF SIGNATORY

SIGNATURE OF BIDDER:

N/B.: If a Company has one director as listed on CSD, the one Director MUST sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

N/B.: If the Company has more than one Director as listed on CSD, a signed Company Resolution must be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

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: 11:00	CLOSING DATE: 30 JULY 2026

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

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. The accompanying information must be used for the formulation of proposals.
2. All delivery costs must be included in the price, for delivery at the prescribed destination. All applicable taxes" include value-added tax (VAT), etc

3. Service Providers are requested to provide an all-inclusive cost of this project assignment with the following clearly indicated:

NO	DESCRIPTION	Unit of measure	COST (Inclusive of VAT where applicable)
1	Cost of preparation and facilitation of the Exco strategic session (3 days)	Per session	R
2	Cost of preparation and facilitation of the Management Committee strategic session (3 ½ days)	Per session	R
3	Cost of editing the draft revised strategic plan and annual performance plan based on the discussions at the Management planning session.	Edited documents	R
4	Cost of preparation of the Board Strategic Session (hourly rate)	Per hour	R
5	Cost of facilitation of the Board Strategic Planning Session (daily rate)	Per session	R
6	Cost of editing and proof-reading the revised and final strategic plan, and annual performance plan based on the discussions at the Board planning session.	Edited documents	R
7	Cost of preparation of the Board / Exco / Manco workshop (hourly rate)	Per hour	R
8	Cost of facilitation of the Board / Exco / Manco workshop (hourly rate)	Per hour	R
9	Cost of facilitation of the Board / Exco / Manco workshop (daily rate)	Per session	R
10	Consolidated and closeout report	Per report	R
Grand Total			R

Bidders are to complete the name and surname of the proposed Facilitatory on this assignment and ensure that comprehensive CVs of this member is attached to the proposal:

NO.	ROLE IN THE TEAM	NAME AND SURNAME (Bidders to indicate <u>one</u> (1) name only)	IS THE CV ATTACHED (circle the response below)
1.	1 x Facilitator		Yes/No

NB.: The resource mentioned above must be available on all the engagements mentioned above.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(MUST be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

- 1.1 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.
- 1.2 Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest 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 the table below

Full Name	Identity Number	Name of State institution

N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above

- 2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**
- 2.2.1 If so, furnish particulars:

.....

.....

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

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 consortium¹ 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.
- 3.5 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.
- 3.6 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.
- 3.7 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.

1 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.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).

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

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

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

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to quote:
- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

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

- a) The lowest acceptable quotation will be used to determine the accurate system once quotations are received.

- 1.3 Points for this quotation (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:

- 1.5 The maximum points for this quotation are allocated as follows:

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

- 1.6 **Failure on the part of a bidder to submit proof or documentation required in terms of this bid to claim points for specific goals with the quotation, will be interpreted to mean that preference points for specific goals are not claimed.**
- 1.7 The organ of state reserves the right to request a bidder, either before a quotation 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. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

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

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

Where

Ps = Points scored for the price of the quotation under consideration

Pt = Price of the quotation under consideration

Pmin = Price of lowest acceptable quotation

3.2 POINTS AWARDED FOR SPECIFIC GOALS

3.2.1 In terms of Regulations 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 quotation.

3.2.2 For the purposes of this quotation, the bidder 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 bid:

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

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

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the bidder)
Black people who are unemployed (31% and above)	5	
Black Women Ownership (at least 30%)	5	
Black Youth Ownership (At least 30%)	5	
The promotion of South African – owned enterprises	5	
Total Points	20	

DECLARATION WITH REGARD TO COMPANY/FIRM

3.3 Name of company/firm.....

3.4 Company registration number:

3.5 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]

3.6 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 quotation, 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 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 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 BIDDER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS

1. As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:
 - a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
 - b) Valid Companies and Intellectual Property Commission (CIPC) Company registration documents
 - c) Certified copy/ies of Identity documents of the Company Directors
 - d) CSD report
 - e) medical report (if any)
 - f) declaration letter signed by the bidder.

NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).

NB: If you receive any suspicious calls asking for payment to secure an award or that the outcome can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigations.

SUBMISSION CHECKLIST:

NO.	DETAILS	TICK BY BIDDER
	Part 1: - Completed and signed Invitation to Quote (SBD 1) (To be signed by a duly Authorised Delegate. A Company Resolution signed by all Directors of the Company must be submitted).	
	Part 2 Completed and signed Pricing Schedule (SBD 3.3).	
	Part 3 - Bidder's quotation on the company's letterheads with all applicable costs and delivery dates. - Quotation MUST be in accordance with the specification. Quotation that is inconsistent with the specification will be disqualified.	
	Part 4: - Completed and signed bidders disclosure (SBD 4). (In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid must complete and sign the declaration of interest document).	
	Part 5: - Completed and signed Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1). Not claiming points for each preference point system on SBD 6.1 will lead to specific goal points not being awarded	
	Part 6: Bidders to submit their National Treasury Central Supplier Database (CSD) registration document.	
	Part 7: Bidders are requested to initial each page of the General Conditions of Contract (GCC) (Annexure A) and submit with their response to this Request for Quotations. The GCC will form part of the contract with the successful Bidder	
	Part 8: Bidders to submit: NB.: Non-submission of the below-mentioned documents (under 6) will lead to specific goal points <u>NOT</u> being awarded.	
	An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.	
	Valid Companies and Intellectual Property Commission (CIPC) Company registration documents	
	Certified copy(ies) of Identity documents of the Company directors	

NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.

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