

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE COMMUNITY SCHEMES OMBUD SERVICE (CSOS)					
BID NUMBER:	RFQ004-2022	CLOSING DATE:	21/04/2022	CLOSING TIME:	16h00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE TRAINING ON MICROSOFT AND REPORT WRITING TO CSOS				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Building 4 Berkley Office Park, 8 Bauhinia Street, Highveld Techno Park, Centurion Or Email to quotations@csos.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Nonkululeko Mthethwa		CONTACT PERSON	Glenda Makhubo	
TELEPHONE NUMBER	(010) 593 0533		TELEPHONE NUMBER	(010) 593 0533/066 305 8303	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	Nonkululeko.Mthethwa@csos.org.za		E-MAIL ADDRESS	Glenda.Makubo@csos.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] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ Yes ☐ No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER PART B:3]
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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, 2017, 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 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:

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE MICROSOFT AND REPORT WRITING

1. TERMS AND CONDITIONS

This Request for Quotation (RFQ) has been compiled by the CSOS and is made available to Bidders subject to the following terms and conditions, which Bidders are deemed to acknowledge and accept:

- 1.1. A Bid submitted in response to this RFQ will constitute a binding offer that will remain binding and irrevocable for ninety (90) days from the date of submission to the CSOS.
- 1.2. Unless or until a binding contract is concluded between the CSOS and the successful Bidder, the offer constituted by the Bid will be deemed not to have been accepted and no agreement will be deemed to be reached with any Bidder.
- 1.3. The CSOS reserves the right to amend, modify, withdraw, or terminate this RFQ or any of the requirements set out herein at any time (and from time to time), without prior notice and without liability to compensate or reimburse any Bidder or person.
- 1.4. Should this RFQ be amended, the CSOS undertakes to publicize or send each Bidder in writing the amended RFQ. No oral amendments by the Bidder or the CSOS shall be considered.
- 1.5. It is compulsory for a Bidder submitting a bid to be registered on the National Treasury's Central Supplier Database ("the CSD") and ensure that it remains registered for the duration of the services and/or contract, if successful.
- 1.6. The Bidder needs to ensure that it is tax compliant at the time of submitting its Bid and remains tax compliant for the duration of the contract and/or services, if successful, and undertakes to provide supporting documentation issued by the South African Revenue Services ("SARS") confirming it is tax compliant upon request by the CSOS.
- 1.7. The CSOS reserves the right to conduct site inspections or call for supporting documentation in order to confirm any information provided by a Bidder in its response to this Bid.
- 1.8. This RFQ is not intended to form the basis of a decision to enter into any transaction with the CSOS and does not constitute an offer or recommendation to enter into such transaction, or an intention to enter into any legal relationship with any person.
- 1.9. Neither the CSOS nor any of its respective directors, officers, employees, agents, representatives, or advisors will assume any responsibility for any costs or expenses



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incurred by any party in or associated with preparing or submitting a Bid in response to this RFP.

- 1.10. No entity may be involved in more than one bid in response to this RFQ, whether directly or indirectly. Failure to comply with this requirement may, within the sole discretion of the CSOS, result in disqualification of the relevant entity.
- 1.11. Any material changes in the control and/or composition of any Bidder or any core member of a Bidder after submission of a Bid shall be brought to the attention of the CSOS Supply Chain Management ("SCM") Section in writing. The CSOS shall be the sole arbiter as to what constitutes a material change in the control and/or composition of any Bidder and may in its sole discretion disqualify the Bidder from any further participation in the bid process.
- 1.12. Any requirement set out in this RFQ that stipulates the form and/or content of any aspect of a Bid is stipulated for the sole benefit of the CSOS, and unless the contrary is expressed, may be waived by the CSOS in its sole discretion at any stage in the bid process.
- 1.13. The CSOS and its advisors shall rely on a Bid as being accurate and complete about the Bidders' information and proposals.
- 1.14. All Bids submitted to CSOS shall become the property of the CSOS and will not be returned to the Bidders. The CSOS will make all reasonable efforts to maintain the information contained in proposals in confidence.
- 1.15. A Bid submitted by the Bidder shall be considered irregular if it shows any omissions or irregularities of any kind. However, the CSOS reserves the right to waive any irregularities and to make an award in the best interest of the organization.
- 1.16. The CSOS reserves the right to accept or reject in part or whole any Bid submitted, and to waive any technicalities if this is in the best interest of the organization.
- 1.17. The CSOS reserves the right to require a Bidder to provide a formal presentation of its RFQ at a date and time to be determined by the CSOS. The CSOS shall provide adequate instructions and clarification regarding the purpose and scope of the presentation. All expenses shall be borne by the Bidder.
- 1.18. In this RFQ, the words "service provider", "supplier" will be used interchangeably to refer to the Bidder.
- 1.19. All costs associated with the preparation and submission of the Bid remain the responsibility of the Bidder. The costs shall not be chargeable to the CSOS by the successful or unsuccessful Bidder.

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE MICROSOFT AND REPORT WRITING

- 1.20. All Bids must be formulated and submitted by the requirements of this RFQ.
- 1.21. Bids received after the closing date and time as specified in this RFQ shall be rejected.

2. INTRODUCTION

- 2.1 The Community Schemes Ombud Service (CSOS) was established as a Public Entity under the Community Schemes Ombud Service Act (Act No 9 OF 2011) [CSOS ACT] which was promulgated on the 11th of June 2011. The CSOS has been classified as a Schedule 3A Public Entity in terms of the Public Finance Management Act (Act No 1 of 1999) [PFMA].
- 2.2 The Community Schemes Ombud Service is established in terms of the Community Scheme Ombud Service Act, 2011 [Act 9 of 2011) to regulate the conduct of parties within community schemes and to ensure their good governance. In order to deliver on its mandate, key amongst the priorities of the organization is:
 - 2.2.1 Regulations of all community schemes;
 - 2.2.2 Provision of Dispute Resolution Services;
 - 2.2.3 Quality assurance and keeping custody of schemes governance documentation;
 - 2.2.4 Providing access to schemes governance documentation to the members; and
 - 2.2.5 Ensuring good governance within community schemes.
- 2.3 In terms of Section 1 of the Act, the term “community scheme” refers to any scheme or arrangement where there is shared use of and responsibility for parts of land and buildings, including but not limited to:
 - 2.3.1 Sectional titles development schemes;
 - 2.3.2 Share block companies;
 - 2.3.3 Home or property owners' associations;
 - 2.3.4 Housing schemes for retired persons; and
 - 2.3.5 Housing co-operatives

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE MICROSOFT AND REPORT WRITING

3 PROJECT BACKGROUND

- 3.1 The CSOS's Executives and Managers normally have monthly and quarterly reporting meetings. The purpose is to provide updates in relation to the deliverables and to monitor the progress of the departmental targets.
- 3.2 In preparation of the reports, the Executives and Managers are required to submit reports that are aligned correctly as per Chief Ombud's guidelines.
- 3.3 During EXCO meetings, it has been notable that most of the submitted reports are not aligned with the correct format, numbering, font size, justification and line spacing which results in obstruction and causes a delay in the business demands.
- 3.4 The mainly two aspects that are in use for consolidating the business reports are Microsoft and Report writing.
- 3.5 Microsoft and Report writing training will enhance a better understanding and be considered as a refresher on basic concepts (such as spelling, grammar, format and punctuation), and an overview of the most common business documents.
- 3.6 There has been a request that the Chief Financial Officer's office, which is Revenue, Finance, Expenditure, Budget and Reporting and Supply Chain Management. Ms Kanya Sicam: Legal Administrator and Ms Busisiwe Ntuli: PA to the Executive Corporate Affairs to attend the Microsoft and Report Writing training.

4 SCOPE OF WORK

- 4.1 The successful service provider will be expected to conduct training for 15 Employees, where thereafter they would be expected to fulfil their roles and their responsibility in their respective units.

Report Writing

- 4.1.1 Understanding the tools and techniques
- 4.1.2 Value of reports
- 4.1.3 What great reports should have
- 4.1.4 Formatting and alignment
- 4.1.5 Numbering

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE MICROSOFT AND REPORT WRITING

- 4.1.6 Total quality and how it relates to reports
- 4.1.7 Data and information
- 4.1.8 Information Mapping

Ms Training

- 4.1.9 Word
- 4.1.10 Excel
- 4.1.11 PowerPoint
- 4.1.12 Import graphs from PowerPoint to word.

5 SUPPLY CHAIN MANAGEMENT COMPLIANCE REQUIREMENTS

- 5.1 To facilitate a transparent selection process that allows equal opportunity to all bidders, CSOS has a Supply Chain Management policy that will be adhered to.
- 5.2 Proposals will be evaluated in terms of the prevailing Supply Chain Management policy applicable to CSOS and it should be noted that proposals will be assessed using the 80/20 formula (preference points system) for Price and B-BBEE as per the PPPFA Regulations.
- 5.3 Bidders must comply with the following compliance requirements prior to evaluation in mandatory requirements:

Submission of documents	Comply/ Not Comply Y/N
Valid B-BBEE certificate issued by an accredited SANAS verification agency/Sworn Affidavit signed by the EME representative and attested by a Commissioner of Oath/B-BBEE certificate issued by the Companies and Intellectual Property Commission (CIPC)	

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE MICROSOFT AND REPORT WRITING

Proof of registration on the National Treasury Central Supplier Database (provide CSD summary report/CSD number)	
Valid TCS pin issued by SARS (letter/pin number)	

6 MANDATORY REQUIREMENTS

- 6.1 Failure to submit accreditation will result in a bidder deemed non-responsive and not further evaluated on Supply Chain Management Compliance requirements.

Submission of documents	Comply/ Not Comply Y/N
Accreditation with MICT SETA or proof of valid relevant SETA accreditation (proof of company accreditation letter must be attached)	

7 GENERAL REQUIREMENTS

- 7.1 All documents to be completed with a black pen.
- 7.2 Please provide a quote on company letterhead in accordance with the pricing schedule below.
- 7.3 Service Level Agreement (SLA) will be entered into between CSOS and the successful bidder.

8 PROJECT TIME FRAME

- 8.1 The training is intended to commence as soon as the service provider is appointed and to be conducted for three (3) days.
- 8.2 Times: 09 to 15:00
- 8.3 Venue to be provided by CSOS.

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE MICROSOFT AND REPORT WRITING

9 EXPECTED OUTCOMES

- 9.1 Training material as a point of reference and facilitating the training.
- 9.2 Certificates of competence to be issued by the Service Provider.
- 9.3 Completion report on the work done to CSOS and also make necessary recommendations.

10 PRICING

- 10.1 The quotation must be inclusive of:
 - 10.1.1 Priced proposal (inclusive of Vat) per learner.
 - 10.1.2 Learner facilitation.
 - 10.1.3 Learning material and presentations.
 - 10.1.4 Certificate of completion.
 - 10.1.5 Service provider to bring their equipment i.e., Flip charter, cocky pens, pens scribblers, overhead projector and all equipment to fulfil the training obligations.

NO	Description	QTY	Unit Price ®	Total Price ®
1.	Facilitation	15		
2.	Learning Material	15		
3.	Certification	15		
4.	Disbursements			
	TOTAL			
	VAT@15%			
	GRAND TOTAL			

11 CONTACT DETAILS

- 11.1 Further information regarding technical matters can be sent via email to Glenda Makubo: Glenda.Makubo@csos.org.za
- 11.1.2 Further information regarding supply chain matters can be sent via email to Nonkululeko Mthethwa: Nonkululeko.Mthethwa@csos.org.za



TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE MICROSOFT AND REPORT WRITING

11.1.3 Bid response documents may be deposited in the bid box situated at
Building 4 Berkley Office Park
8 Bauhinia Street,
Highveld Techno Park,
Centurion

OR

Sent to the central mailbox quotations@csos.org.za

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: BID NO: RFQ004-2022 THE APPOINTMENT OF A SERVICE PROVIDER FOR MICROSOFT AND REPORT WRITING

CLOSING DATE 21 APRIL 2022

CLOSING TIME 16:00PM.

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

ITEM NO TAX	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <u>VALUE ADDED</u>
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DESCRIPTION: THE APPOINTMENT OF A SERVICE PROVIDER FOR MICROSOFT AND REPORT WRITING

- Services must be quoted in accordance with the attached terms of reference.

Services must be quoted in accordance with the attached terms of reference.

Total cost of the assignment (R inclusive VAT)

R.....

NO	Description	QTY	Unit Price (R)	Total Price (R)
1.	Learner Support	15		
2.	Assessment	15		
3.	Laminated Certificates	15		
4.	Learning Material	15		
5.	Disbursements			
	TOTAL			
	VAT@15%			
	GRAND TOTAL			

The financial proposal for this assignment should cover for all assignment activities as per terms of reference

2. Period required for commencement with project after acceptance of bid_____
- 3 Are the rates quoted firm for the full period? Yes/No
4. If not firm for the full period, provide details of the basis on which Adjustments will be applied for, for example consumer price index.

Technical enquiries regarding bidding procedures may be directed to:

Glenda Makubo

Tel: (010) 593 0533

E-mail address: Glenda.Makubo@csos.org.za

Supply Chain queries may be directed to:

Nonkululeko Mthethwa

Tel: 010 593 0533

Email: Nonkululeko.Mthethwa@csos.org.za

PLEASE REFER TO THE ATTACHED TERMS OF REFERENCE FOR MORE INFORMATION.

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

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.

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 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

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.

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