



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

Description	PROVISION OF STUDENT SALES MANAGEMENT SYSTEM AND LEARNER/CUSTOMER RELATION MANAGEMENT SYSTEM AND API;S FOR UMGENI WATER SERVICES FOR A PERIOD OF 2 YEARS
Advert Date	27/08/2024
Closing Date and Time	19/09/2024 at 15h00
Non-Compulsory Briefing Session	Venue: Durban Heights Training Centre 88 Dunkeld Rd, Reservoir Hills, Durban, 4091 Date: 03/09/2024 Time: 11:00 am Alternative teams meeting: Meeting ID: 310 955 825 097 Passcode: TxUimV Bidders must ensure that they bring their documents to the clarification meeting for signing purposes. No concessions will be made for bidders who do not have their bid documents in their possession
SCM Enquiries	Name: Zandile Mhlongo Tel: 033 341 1217 Email: zmhlongo@mhlathuze.co.za
Technical Enquiries	Name: Cedric Van der Merwe Tel: 031 341 7470 Email: cedric.vdm@umgeni.co.za
Contents of RFQ	1. Invitation to quote 2. Bidders information 3. Terms and Conditions 4. Undertaking by Bidder 5. Terms of Reference/RFQ specifications 6. Contract Participation Goals (CPG) 7. Price Schedule 8. Authority to Sign 9. Bidders disclosure [SBD 4] 10. Preference points claim form (SBD 6.1) 11. Briefing session certificate 12. Contract Form [SBD 7.1 or SBD 7.2]

Quotation Submission:	Tip-Offs Anonymous Hotline:
Quotations clearly marked, <i>'RFQ Number and description of the required goods/services'</i> To be emailed to scmquotes@umgeni.co.za using Quote number as the email subject	Report unethical conduct at Umgeni Water Services to: The Office of the Managing Director Attention: The Managing Director Email: peter.thompson@umgeni.co.za <i>Stop theft / fraud / dishonesty / bribery /blackmail /</i>



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RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
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Quote number as the email subject

intimidation, and remain anonymous.

BIDDERS INFORMATION

Name of Bidder	
Company Registration number	
VAT registration number	
Contact Person	
Telephone number	
Cell number	
E-mail address	
Postal address	
Physical address	
uMngeni-Uthukela Vendor Number	
CSD Supplier number	

I certify that the information furnished on this form is true and correct. I further accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.

Name of Representative
(Duly Authorised)

Signature

Date

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

TERMS AND CONDITIONS OF REQUEST FOR QUOTATION (RFQ)

1. Any alteration made by the bidder must be initialled.
2. Use of correcting fluid is prohibited
3. Bidders must be registered on the National Treasury's Central Suppliers Database.
4. Tenderers are required to submit a valid Tax clearance verification PIN or CSD MAAA number
5. This quotation is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2022; the General Conditions of Contract (GCC) and if applicable any other Special Conditions of Contract.
6. The applicable preference point system for this tender is the 80/20 preference point system, Failure on the part of a tenderer to submit proof or documentation required in terms of this RFQ to claim points for specific goals, will be interpreted to mean that preference points for specific goals are not claimed by the bidder. Kindly refer to SBD 6.1 form for additional information.
7. Suppliers must complete the attached SBD 4 – Bidders disclosure, failure to complete these documents may result in the quotation being invalidated.
8. Quotations must be in accordance and comply with the terms of reference/specifications provided, unless otherwise stipulated.
9. Tenderers are required to achieve at least 20% Contract Participation Goals (CPG) including a minimum 10% Black Women participation and another 10% for Local participation of the value of goods, services and Works paid to one or more targeted enterprises in compliance with Umgeni Water Services' Enterprise and Development.
10. The official Umgeni Water Services quotation form must be used to quote the offered price. Should the allocated price page be insufficient, the tenderer may supplement the price page with an additional pricing breakdown.
11. Price Declaration must be completed, and should the total RFQ prices differ, the one indicated on the price declaration shall be considered the correct price.
12. The successful supplier may be required to fill in and sign a written Contract Form. (If applicable)
13. This document may contain confidential information that is the property of Umgeni Water Services.
14. No part of the contents may be used, copied, disclosed or conveyed in whole or in part to any party in any manner whatsoever other than for preparing a proposal in response to this RFQ, without prior written permission from Umgeni Water Services and the Bidder.
15. All Copyright and Intellectual Property herein vests with Umgeni Water Services and its Bidder.
16. Responses to this RFQ must be submitted by email scmquotes@umgeni.co.za or be deposited in tender box situated as indicated on the quotation request form marked appropriated as directed. (*The applicable submission method is reflected on the cover page*).
17. It is the responsibility of the bidder to ensure that its response reaches Umgeni Water Services on or before the closing date and time of the RFQ. Late and incomplete submissions will not be accepted.
18. No services must be rendered or goods delivered before an official Umgeni Water Services Purchase Order form has been received.
19. **Umgeni Water Services reserves the right to appoint more than one supplier/service provider and or to award the quote as whole or in part.**
20. A full copy of General Conditions of Contract (GCC) are available on the National Treasury website (<https://www.treasury.gov.za/divisions/ocpo/sc/generalconditions/general%20conditions%20of%20contract.pdf>)



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RFQ Number: Q25/009/ZM

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Version No: 1/2024
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UNDERTAKING BY BIDDER

1. I/We hereby quote to supply all or any of the supplies and/or to render all or any of the services described in the attached documents to Umgeni Water Services on the terms and conditions. In accordance with the specifications stipulated in the quotation documents (and which shall be taken as part of and be incorporated into this quote) at the prices and on the terms regarding time for delivery and/or execution inserted therein.
2. I/we agree that:
 - (a) the offer herein shall remain binding upon me and open for acceptance by Umgeni Water Services during the validity period indicated and calculated from the closing time of the quote;
 - (b) this quote and its acceptance shall be subject to the Public Finance Management Act, 1999, Umgeni Water Services' Supply Chain Management Policy, the General and Special Conditions of Contract as may be applicable, with which I/we am fully acquainted;
 - (c) if I/we withdraw my quote within the period for which I/we have agreed that the quote shall remain open for acceptance, or fail to fulfil the contract when called upon to do so. Umgeni Water Services may, without prejudice to its other rights, agree to the withdrawal of my quote or cancel the contract that may have been entered into between Umgeni Water Services and I/us. I/we will then pay to Umgeni Water Services any additional expenses incurred for having either to accept any less favourable quote or, if fresh quote have to be invited, the additional expenditure incurred by the invitation of fresh quotes and by the subsequent acceptance of any less favourable quotes. Umgeni Water Services shall reserve the right to recover such additional expenditure by set-off against monies which may be due to me under this, or any other tender or contract or against any guarantee or deposit that may have been furnished by me or on my behalf for the due fulfilment of this or any other tender or contract. Pending the ascertainment of the amount of such additional expenditure to retain such monies, guarantee or deposit as security for any loss Umgeni Water Services may sustain by reason of my default;
 - (d) if my quote is accepted, the acceptance may be communicated to me by electronic mail, to the email address supplied in my quotation document;
 - (e) the law of the Republic of South Africa shall govern the contract created by the acceptance of my quote and I choose *domicilium citandi et executandi* in the Republic at (full physical address) :

3. I/we furthermore confirm that I/we have satisfied myself as to the correctness and validity of my quote: that the price(s), rate(s) and preference quoted cover all of the work/item(s) and my obligations under a resulting contract, and I accept that any mistakes regarding the price(s) and calculations will be at my risk.
4. I/we hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement, as the Principal(s) liable for the due fulfilment of this contract.
5. I/we agree that any action arising from this contract may in all respects be instituted against me and I/we hereby undertake to satisfy fully any sentence or judgement, which may be pronounced against

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

me as a result of such action.

6. I/we confirm that I/we have declared all and any interest that I or any persons related to my business has with regard to this quote or any related quotations by completion of the Declaration of Interest Section.
7. **I/WE, THE UNDERSIGNED, WHO WARRANT THAT I AM DULY AUTHORISED TO DO SO ON BEHALF OF THE TENDERER, CERTIFY THAT THE INFORMATION SUPPLIED IN TERMS OF THIS DOCUMENT IS CORRECT AND TRUE, THAT THE SIGNATORY TO THIS DOCUMENT IS DULY AUTHORISED AND ACKNOWLEDGE THAT:**
 - (1) The tenderer will furnish documentary proof regarding any tendering issue to the satisfaction of the Umgeni Water Services, if requested to do so.
 - (2) If the information supplied is found to be incorrect and/or false then Umgeni Water Services, in addition to any remedies it may have, may: -
 - a) Recover from the contractor all costs, losses or damages incurred or sustained by Umgeni Water Services as a result of the award of the contract, and/or
 - b) Cancel the contract and claim any damages, which Umgeni Water Services may suffer by having to make less favourable arrangements after such cancellation.

 Name of Representative
 (Duly Authorised)

 Signature

 Date



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RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

TERMS OF REFERENCE

1. Background

- 1.1.** The main focus of UWS is to build the capacity of local government and district municipalities in the water and energy sector. In addition to its domestic obligations, UWS also works with a network of similar institutions in Africa and around the world to promote democratic governance and development of the public sector on the African continent.
- 1.2.** From the perspective of the needs, training delivery and learner management and administration, automation and digitisation involves provision of A delivery system that equally supports **clients, students, teaching staff and administrators**. Such a solution must integrate with existing systems, be easy to deploy, be affordable, secure and flexible to respond to UWS specific requirements. A complete solution must provide for a paperless process and online document management while complying with the requirements of national and departmental policy frameworks, data security, information management as well as process management and workflow.
- 1.3.** Any such solutions should, at the minimum:
- 1.3.1.** be a suitable and secure solution that is in compliance with ICT standards and legal frameworks of Government and Umgeni Water Services;
 - 1.3.2.** Integrate with existing UWS systems such as Moodle, EIM and SAP and interface with current applications that are for the purpose of administration of training delivery.
 - 1.3.3.** Provide a portal as a single point of access to activities involved in the administration and management of ETD in UWS; and be web/cloud based, accessible by multiple user types and levels; and hosted in the cloud
- 1.4.** These terms of reference contextualize and describes the requirements of the solution that is needed by UWS to successfully, efficiently and effectively move from a mainly manual legacy business process and systems environment, to a relevant 21st century solution to support UWS operations and learners.

2. Purpose and Objectives of the Bid

- 2.1.** The purpose of this bid is to appoint a service provider(s) that will supply, install, customize, implement (to full production), support and maintain three (3) key systems, collectively referred to as the Training Management Systems (TMS):

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

- a) Education Sales Management System (ESMS),
- b) Learner Relationship Management System (LRMS), and
- c) API to interface above systems with Moodle (API)

For the balance of this document the above three systems will collectively be referred to as the Training Management Systems (TMS)

3. Scope of Work

The scope of work in this terms of reference includes the provision of an Training Management Systems which should incorporate the following

- Student Sales Management System (SSMS) which would the outside facing interface/portal/website to sell short courses to potential students and the public
- Learner Relationship Management System (LRMS).
- API to interface with Moodle and other systems used in UWS as listed in the specifications
- This includes the licensing requirements for an enterprise solution for an organisation with the reach and size of UWS staff compliment of up to 50; decentralised access to the system by organisations and individuals, facilitators; assessors and others in addition to the employees of UWS,
- the development of an online portal to provide an integrated access to all related systems, and the maintenance and support of the TMS for a period of 2 years.

3.1. The scope of work for each specific area is captured in Table 1.

Table 1: Scope of Services

Service / Product range - Name	Service/ Product range- Description
Training Management System (TMS) Open Source or Proprietary Training Management Application	a) Provision of the application and where applicable the source code for the application; b) Provision of licenses of an enterprise solution. c) Installation of the application on a server as identified by UWS d) Training to super users of the system in all aspects of the system e) Customizing the core system to provide for all critical requirements if so agreed that are not provided for in a baseline solution; f) Implementation of the system(operationally across all areas of interface and integration),
Provide single point of access to the TMS	a) Develop an online portal for access to UWS TMS and other core systems. b) This portal should be integrated with UWS website to provide a

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

Service / Product range - Name	Service/ Product range- Description
	seamless online experience for all users including administrators, teachers, clients, students and others. c) The portal should serve as a single point of entry to any training management and support services provided albeit to clients, learners, administrators or ETD practitioners of UWS.
Hosting of the UWS TMS and Database	a) Providing cloud hosting services for the system: I. In compliance with all government policies and legal frameworks; II. Security management and governance; III. Protection of personal information (POPI Act) IV. Providing secure 24/7/365 access to the platform and the system; V. Provide expansion of the database to support the extended ,mandate of UWS; VI. Back up and disaster recovery conducted by the service provider. VII. Services will be managed by an SLA
Support and Maintenance of the UWS TMS	The provision of the technical and functional support required to maintain the business system to UWS for a period of 3 years. I. As this is the core business system of UWS, turnaround times will be linked to the severity level of the call(s); II. Services will be managed by an SLA.

The Provider will be appointed to provide all services pertaining to the TMS of UWS as captured in Table 1

3.2 Training Management System (TMS) Requirements

Overview

- Student Sales Management System (SSMS) which would the outside facing interface/portal/website to sell short courses to potential students and the public
- Learner Relationship Management System (LRMS).
- API to interface with Moodle and other systems used in UWS as listed in the specifications

This solution should among others, provide a single repository for academic data that can be accessed by education and training management administrators, office managers, accountants, and executives, as well as clients and students. The TMS includes automation of processes such as admissions, enrolment, class scheduling, and should integrate with

existing systems and accounting software to automate billing and manage tuition payments by organisations and individuals providing for multiple payment methods, as well as with classroom management, grade books and assessment results and reports. The TMS will provide access to all functionalities via an UWS Online Services Portal, which will provide online access to a wide range of users for various uses and purposes.

The portal should be integrated with Umgeni Water Services website, and provide access to the TMS and other related training management systems identified by Umgeni Water Services in order to provide a seamless online experience for all users, among others, administrators, teaching staff, students, clients and UWS management.

The Moodle online learning platform:

UWS uses Moodle as the online learning management system. The data in Moodle is learner specific. Moodle at UWS provides for facilitated learning interventions, self-paced learning interventions, student and facilitator interaction, submission and assessment of learner evidence, as well as communities of practice in specific fields. **Any solution should integrate fully with the Moodle platform, and make allowance for the extension of the use and functionality of the Moodle platform as may be required from time to time.**

3.3 Application Requirements

Principles

UWS needs administration and management systems that are current, accessible, scalable, easy to use and cost effective. Any solution should meet at least 80% of the requirements before customisation.

Any solution should comprise of the core modules and functions required to support administration and management and automate most or all activities of UWS value chain described in Table 2.

Table 1: Automation and support to Umgeni Water Services value chain

Value Chain Item	Value chain activities	Context of system/ Application support
ETD Content Creation	ETD response package (courses, programmes, workshops training tools, etc.)	Repository of electronic course material and training tools. Automated distribution of course material and tools to students, and teaching staff per schedule. Version control of all material in the repository.

Value Chain Item	Value chain activities	Context of system/ Application support
Service Offering	Training interventions, education intervention, capacity development interventions, institutional interventions Special events and masterclasses in various delivery formats (face to face, online, virtual/ remote, blended). Sales and Customer Relationship Management System E-Commerce Marketing, Sales and Payment Platform	Access control and audit trail Data tables/ repositories and functionality needed to manage resources and deliver intervention on multiple platforms (eLearning, face to face, virtual), including trainers, venues, special requirements, contracts, and schedules of training and deployment records. An annual training plan or calendar that provides for the allocation and deployment of resources such as trainers, venues, etc. The systems should provide for the management of these resources and maintain records and reports of use / deployment as well as availability. The system should provide for automated communication (email, SMS, WhatsApp) when resources are allocated and /or deployed Reporting and intelligence on markets and opportunities based on available data. Integrate with Moodle, SAP and other UWS systems to enable access from anywhere.
Enablement and engagement	Market size and spread modalities of reach technology and infrastructure partnerships	Automate and digitize records and engagements including special contracts, payments and use/ deployment. Central database of partnerships, linked to offerings, contract periods, costs etc. These partnerships includes but not limited to providers of services and funds, contracted specialists and experts and any other education and training individual or entity that UWS may partner with from time to time.
Delivery	Delivery plan scheduling and registration resource deployment	Online registration , application, admission and scheduling ; training calendar; digital attendance records; deployments and coordination, automated assessments and certification,; records and document management; integrated workflow with all linked work

Value Chain Item	Value chain activities	Context of system/ Application support
		activities such as finance and eLearning. Providing for paperless record keeping and workflow to manage approval and communication processes. Mobile access (Apps) for students, administrators and teaching staff.
Outcomes and impact	Quality monitoring and evaluation of learning and development intervention.	Automated and fully digitized monitoring and evaluation (M&E) systems (development of instruments, administration of instruments, allocation of data sets for capturing and or analysis of data, generation of reports (including statistical representations of data), feedback to stakeholders. Linking to the online registrations, training calendar, attendance records, updates on the success rate of portfolios of evidence, assignments, examinations and tests submitted, number of competent participants per accredited training programme, enable the running of data queries (various permutations of variables), uploading/ capturing of evaluation data linking to the relevant programme that was trained; sending of automatic reminders to complete the surveys after a training intervention, the generation of a certificate of attendance once the survey has been completed, mobile access for questionnaires; reports and information.

The terms online, automate, paperless and ease of use are key words to describe a new business solution.

3.4 TMS functionality

The solution required must respond to the business needs, functions and rules of Umgeni Water Services. These requirements must provide for at least the following:

- A cloud/web-based, fully automated digitised workflow and electronic document management with integration into all relevant systems and processes
- The system must support all business processes of UWS, including curriculum and course content, detailing learning outcomes, price, duration, mode of delivery, offering institution, and any other information a prospective client or student will require to make a decision to apply to attend training at UWS.

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

- The system should allow UWS to sell courses from an E-Commerce website. It should take online enrolments and applications, collect payments through an e-commerce platform. It should capture enquiries directly from the website and automatically create a new sales contact record. Facilitate sales- access to BI reporting web based/ app decentralized access
- The system should incorporate a Learner Relationship Module (LRM) which should automatically create a new Learner Record and Enrolment from a Sales Contact. It should Track and record the complete communication history with new leads or existing learners. The LRM module or App should track leads and opportunity progression It should also link existing Learner Records to Sales Contacts to maximise re-enrolment opportunities. It should have a Contact Center Call Logging facility; It should use Artificial Intelligence (AI) responses to standard information requests and queries, 2nd line support referral.
- The system must provide for an annual or a bi-annual training calendar informed by registrations and providing for a catalogue of a wide range of education, training and professional development opportunities.
- The system must provide for online applications and registration by students and coordinators, and include functionality for the uMngeni Water Learning Academy to process, select, admit, and register students online.
- Registrations must be supported by providing a payment portal and integrating with UWS SAP debtor's system. The processes supported by the system must include the required controls and communication to students and administrators.
- The systems must provide a comprehensive learner record for students and public sector employees to record and report on personal information required to manage the development and career path of such an employee. Where required the system must be set up to integrate with or import data from other sources. Data quality is a prerequisite, and requires verification and validation of South African Identity Numbers.
- The system must provide for online engagement with clients (private individuals, national, provincial, local and sector departments), automated communication, making provision for quotations, bookings, invoicing and payment processes of the State. The system must have the functionality

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

to manage a calendar and the coordination and resource allocation and deployment required by UWS. It must provide for records of attendance (electronic/ digital collection of data in the classroom, and interfaced records from Moodle and other virtual classrooms such as Zoom or Teams, electronic document management and distribution - including integration with Moodle for electronic distribution of Learning material, and communication (email, SMS etc.).

- The system must provide for managing the learner from application to certification, and must allow for online submission of assignments, assessment and moderation and communication between assessor, moderator, student and administrator is a minimum requirement. The system must allow for all records required by the National Learner Records Database, and must be able to interface with the management information systems of all UWS quality partners or export relevant learner completion records to quality councils and assessment partners. The system must allow for electronic issue and distribution of certificates. Certificates are required to have a unique QR code that will serve to verify the validity of the certificate by linking to a central database.
- The system must provide for the management of contracted service providers which will include the processing of payment requests to finance for payment of service providers as determined by UWS policy and practice.
- The system should provide monitoring and evaluation (M&E) facilities, completion of Reaction Evaluation Questionnaires by learners on mobile devices or computers, including capture of relevant M&E data, automated reports and extracts of selected/optional data.
- The system should generate a wide range of data analytics, dashboards, and reports to different classes of users.
- Workflow automation will maximise efficiencies and control and, by providing the relevant delegations, business rules and outcomes, tasks should be routed allowing for electronic approvals to be integrated in document management and records maintained by the system.
- The system must be able to facilitate automated migration and importing of key data from external systems and to enable seamless integration with other UWS delivery systems. The system should be web-enabled in all aspects of its operation, to facilitate access as appropriate by different

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

users (internal and external to UMGENI WATER SERVICES) and manage these users in accordance with an approved security structure, authentication and security systems to control levels of access for different types of users and data must be secure at all times. Full audit trails should be available on all records and updates allowing access to audit trails in an easily accessible format. A user-friendly and quick and easy access to system functions for both UMGENI WATER SERVICES, personnel, other providers, and public sector employees will be a first prize solution.

- Any proposal of a system or application must provide for customising of the solution to fit the needs of Umgeni Water Services. It is a prerequisite that the system be customised to reflect Umgeni Water Services brand in pages, functions and templates. The system must integrate with, or provide access to, all systems and applications relevant to training and learner management, quotations and invoicing and others, through a single portal on UMGENI WATER SERVICES web.

3.5. Functional Descriptions and Minimum Data/ Process requirements

Table 2: Functional descriptions and minimum data/ process requirements

FUNCTIONS	Functional Description	Data requirements If empty there is not minimum requirements
CORE FUNCTIONS		
Students	Comprehensive records of students personal information and teaching and training records as required by the SAQA Act and UWS Database compliance with legislation (e.g. POPI Act) emergency contacts, class history, performance reporting, contact information and photo id, email and name, address records, contact information. The system must be able to verify student Identification and Passport Numbers	Minimum student records requirements POPI Act compliant Annexure A: QCTO learner record upload guideline integrated with a system for the Verification of ID and Passport numbers
Faculty	Comprehensive records of trainers and teaching staff, deployment schedules, expense records and others. Full database on Umgeni Water Services	Records of claims and payments in line with PFMA

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

FUNCTIONS	Functional Description	Data requirements If empty there is not minimum requirements
	offerings	
Qualifications, programmes and courses	Full database of UWS offerings	Minimum fields requirements; - <i>Annexure B</i> - Records in the Course Matrix
Application, registration and enrolment	Provide an online process and records of application, registration and enrolment to a training calendar and class schedules. Online enquires “status” as well as built in communication process. Students can register for classes through the UWS Website, by individual course or programme multiple courses or programmes using the web portal. Automatically provide a proforma quotation and integrate with the SAP system to automatically issue an invoice for fees and services at the time of registration, invoice different fees by registration type as determine by UWS processes and SAP. Track records for follow up: dropped registration and preregistrations by class.	Records of individual applications per class, course, client, status. Waiting list and overflow: Automatically created wait lists for classes with maximum number of registrants. Automatic notifications via email or mail of wait listing or registration to specified users.
Examinations and assessments	Online submissions of assignment, online examinations, examination records including academic history and results. Continuously updated information on the attendance percent and exam point percentage, grades, GPA, hours and credit earned.	Data must be stored in such a way that it can be accessed per individual student, per class or per organization/ client
Financial services including quotations, online payments, invoicing records	Online portal to automate quotations, provide for online payments and bookings to suite of pre-determined programmes Must be accessible to individual and organisations across the Public Sector Multiple payments to be provided for	Must comply with PFMA and UWS policies Must integrate with the UWS Debtors System (SAP)
Classroom management and attendance	Access to digital attendance records captured in class. Examples may be a scanning APP, or other digital mechanisms relevant to the classroom.	Annexure D Minimum Fields required in attendance records

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

FUNCTIONS	Functional Description	Data requirements If empty there is not minimum requirements
	The class lists, schedule detail (venue, trainer, etc).	Security feature to minimize fraudulent records.
<i>Calendar and resource scheduling</i>	Provide for an annual or bi- annual training calendar	Annexure C- Minimum information requirements - Calendar Online access Linked to application and/ or registration process Class record controls and scheduling, which grade policy is used, how exams/ assessments are scheduled, whether web registration is allowed, and assigns academic content. Delivery method indicator: virtual learning, classroom delivery, online or mixed method.
<i>Library of training material and resources</i>	Database of all learning material and resources per programme. Version control. Access control. Release of material per programme. Integration with Moodle. Document security to manage copyrights	Database of all learning material and resources per programme.
<i>Dashboard</i>	Management reports and dashboards on active training courses, progress against the calendar, certification, assessment, etc.	Customizable forms/ templates: transcript, grade reports, progress reports, welcome letters, registration letter and grade awards
<i>Reporting</i>	Operational reporting as may be standard to the tool	Integration with QlikView & BI must be possible
<i>Mobile application</i>	A mobile app to support students, clients' teachers, administrators. Access to attendance records/ registers.	Mobile Application
ERP FUNCTIONS		
<i>CLIENTS</i>	Complete clients' records. These clients can be	Annexure E- Minimum

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

FUNCTIONS	Functional Description	Data requirements If empty there is not minimum requirements
	individuals or companies that UWS serves and who can make bookings and payments and procure services from UWS This is needed to ensure that the TMS provides for a link with e.g. SAP data to access information already available to UWS	Records required in the client data table
Accounting records	All accounting records must be available in the central database, debtors, cost of sales, course prices and other Invoice records (invoice date, invoice number, invoice amount) for class registration fees, tuition contracts, tutoring/ coaching sessions and other records of income and expenditure as identified and obtain form the UWS accounting system (s) such as SAP	All accounting records must be available in the central database, debtors, cost of sales, course prices and other
Sales	The system should allow UWS to sell courses from the website. It should take online enrolments and applications, collect payments through an e-commerce platform. It should capture enquiries directly from the website and automatically create a new sales contact record. Facilitate sales-access to BI reporting web based/ app decentralized access	
Stock management of physical resources	The system should provide for stock control of physical training resources such as training material, training tools etc.	
LRM	The LRM module should automatically create a new Learner Record and Enrolment from a Sales Contact. It should Track and record the complete communication history with new leads or existing learners. The LRM module or App should track leads and opportunity progression It should also link existing Learner Records to Sales Contacts to maximise re-enrolment opportunities. It should have a Contact Center Call Logging facility; It	

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

FUNCTIONS	Functional Description	Data requirements If empty there is not minimum requirements
	should use Artificial Intelligence (AI) responses to standard information requests and queries, 2 nd line support referral.	
Email integration	The system must integrate with the existing emails systems of Umgeni Water Services	Outlook and Mimecast, office 365
Access control	The system should provide for access to users with different profiles, roles and levels of access	Compliance with Umgeni Water Services minimum security standards – Specifications will be issued to successful bidder
Communication functions		
Survey and responses	The system must cater for feedback per student per class attended for monitoring purposes. Specific templates for specific courses/ types or interventions.	Annexure F- Requirements for the automation of Monitoring and Evaluation (M&E) Requirements
News portal	Communicate important information to students, participants, clients and staff push notifications for important news	On the web: complete snapshots of a student's performance, including attendance, grades, calendar and previous classes. Shows invoicing and allows payment and registration for new classes. Access control required.
General communication	Bulk email / SMS. Send messages individually or simultaneously to many students/ teaching staff, administrators, etc. Records of communication with students (manual or auto), send reports, schedules, grades, notices etc. Email/ SMS App	Track student activity on Moodle and provide appropriate responses/ communication to students and teaching staff i.e. inactivity on the Platform.
Sales and marketing	Push up messages to identified/ selected students and clients.	Communicate content and standards per message



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

FUNCTIONS	Functional Description	Data requirements If empty there is not minimum requirements
	Searchable course catalogue of classes currently accepting registration. Separate portal for allowing both students and non- students to register for classes. This portal should not require login to Umgeni Water Services system before use. Differentiate between existing and new students- new students should automatically add a new student record.	Website security per government and Umgeni Water Services Policy

Other Requirements

Integration with Moodle	Full integration with Moodle is a non-negotiable requirement. Students and classes should be added to Moodle creating groups and student list. All information from Moodle should also update attendance, grades etc.	
Integrate with SAP	The SAP system performs critical functionality for Umgeni Water Services and it is not the intention of Umgeni Water Services to replace the SAP system. As such, full integration with SAP system is required. This means that when online registration is processed, the automation of invoicing activities is required, ongoing integration of information and records between SAP and the central database, including payment status, invoice numbers among others.	
Integration with other applications	The Umgeni Water Services uses Microsoft products and the system must be able to export and import information, forms or templates from at minimum Ms. Excel and Ms. Word, EIM. The system must allow for integration with core	

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

	systems and platforms of Umgeni Water Services including QlikView & BI as reporting system and all Contact Centre systems of Umgeni Water Services.	
Documentation	It is expected that the service provider will provide comprehensive documentation of the solution (s) provided including but not limited to Functional descriptions, User Guides and training material, Technical Specifications.	

Whenever a new project is initiated within any of the aforementioned functional areas, the selected service provider will conduct the project's initiation, planning, execution and control, and closeout in compliance with UWS's project management standards or using a methodology that conforms to those ascribed in the PMBOK or any other UWS approved project management methodologies

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4. General

The bidder shall provide evidence (CVs and contracts) of suitably qualified and experienced ICT specialists that will support the product and services that the bidder intends to provide to UWS as part of the Bid.

The bidder shall provide evidence and letters of reference of their track record in Applications Deployment, Management, Maintenance and Development preferably in a learning and professional development service environment.

The successful service provider will work under the supervision of UWS delegated officials, and will be expected to be on-site, and provide on-site support for at least the first 2 months after the application is implemented (5 days of the week - 4 hours per day).

The appointed service provider shall be subjected to signing of a "Declaration of Secrecy" prior to the commencement of the contract.

No information concerning the state's activities may be furnished to the public or media by the service provider or any of his/her employees.

Solution deployment should not interfere with the normal operation of UWS unless specifically scheduled.

Arrangements should be made for after hours or over weekends for work that will interfere/interrupt with normal ICT operations for extended periods.

The Department retains the right to evaluate the services rendered by the service

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

provider together with its sub-contractors at any time, in order to ensure service alignment with the conditions of the contract.

5. Contract term

The successful bidder(s) will be appointed for a maximum period of two (2) years from date of appointment, dependent on the requirements of the service or product that the bidder is appointed for.

6. Other information

- a) Payment will be on successful delivery of milestones and monthly on invoice.
- b) New Intellectual Property arising as a result of the Contract will be the property of UWS

7. Mandatory documentation/requirements

- a) Company profile,
- b) Key Personnel CVs,
- c) Detailed proposal/Method statement,
- d) reference letters,
- e) bidder's disclosure

8. Other documents

In addition to this Bid document, the documents listed below form part of this Bid:

- a) n/a

9. Other conditions

9.1 Compliance with Labour Relations

All ICT security and related governance protocols, as they apply to Umgeni Water Services and the Public Sector as a whole, must be complied with in the provision of solutions and services.

9.2 Damage compensation/indemnity

The service provider will be held responsible for any damages, due to negligence, or theft, by their employees, in the normal execution of their duties or otherwise and indemnifies UWS against any resultant claims.

9.3 Access to the building

The service provider personnel shall be provided controlled access to the building in terms of its contract during normal office hours and to comply with UWS access procedures.

The service provider must take responsibility to inform UWS to deactivate such access where employee is no longer in the service of the service provider or at the

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

expiry of the contract.

Any employee of the Service Provider must comply with UWS policies and procedures in relation to employee Security, Conduct and Health and Safety.

9.10 Pricing

The bidder shall provide the price proposal as detailed in SBD 3.1

The bidders's price must be fully inclusive, and each item must be clearly specified.

All additional costs must be clearly specified and included in the total quotation price, (e.g. transport, labour, etc.).

All prices must be VAT inclusive.

The bidder is responsible for all the cost that they shall incur related to the preparation and submission of the quotation.

10. Evaluation Process

The RFQ will be evaluated using a three (03) stage evaluation approach:

Stage 1: Mandatory/ Administrative Requirements.

Stage 2: Evaluation of functionality and technical responsiveness

Stage 3: Price and Preference goals

- **First stage:** Administrative Requirements

1. Bidder completed all RFQ Forms
2. Bidder registered on National Treasury CSD
3. Proof of business address

Mandatory Requirement

4. SBD 4 – Bidders disclosure

- **Second Stage:** Functionality

- **Third Stage:** Price and Preference goals

1. Subsequent to the evaluation of mandatory/ administrative requirements, the second stage of evaluation of the bids will be in respect of price and preferential procurement only.
2. Tenderer is tax compliant
3. In compliance with the Preferential Procurement Regulations 2022, the 80/20 preference point system is applicable: points for this bid shall be awarded for:
 - a) Price; and (80) and Preference as defined in SBD 6.1 (20)
4. The Preference Goals that have been identified for this bid is stipulated in SBD 6.1
5. Preferential goals and applicable points for this tender in terms of Preferential Procurement Regulations 2022, are indicated in the table below:

	Description	80/20	Evidence to be provided
HDI	The promotion of enterprises located in a KZN	10	Proof of business address or CSD report
RDP	An entity which is at least 51% owned by black people.	10	Valid CSD report
Total points for preferential goals		20	

6. Failure on the part of a bidder to submit proof or documentation required in terms of this RFQ to claim points for specific goals, will be interpreted to mean that preference points for specific goals are not claimed by the bidder.
7. UW reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by UW.
8. UW reserves the right to conduct negotiations with the qualifying bidder/s regarding any terms and conditions, including price(s), of a proposed contract where applicable UW reserves the right not to accept the lowest financial offer or any offer.

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

Stage 2: – Evaluation of Functionality

The following schedules must be returned for purposes of functional evaluation

Returnable Schedule	Weighting %
Tenderer's Experience	40
Experience of Key Personnel	30
Method Statement	30

The purpose of application of qualification criteria is to determine the functionality of each proposal by assessing the quality thereof. Below is a detailed breakdown of the scoring criteria

Bidders from the second stage who have achieved 70 points out of a total of 100 points or more will be eligible to submit to be evaluated on Price and Specific Goals.

Scoring Criteria

Functionality criteria	Description of requirements	Maximum points
Tenderers Experience	The experience of the Tenderer or joint venture partners in the case of an unincorporated joint venture or consortium will be evaluated on the basis of experience in similar projects or similar areas and conditions in relation to the scope of work. The evaluation will consider experience in relation to the management of programmes and projects and the provision of cloud hosting services	40
Experience of Key Personnel	The experience of the Tenderer or joint venture partners in the case of an unincorporated joint venture or consortium will be evaluated on the basis of experience in similar projects or similar areas and conditions in relation to the scope of work. The evaluation will consider experience in relation to the management of programmes and projects and the provision of cloud hosting services	30
Proposed Organisation & Staffing	Suppliers must propose the structure and composition of their team for the installation, hosting, and support project..	

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

Functionality criteria	Description of requirements	Maximum points
Method Statement	Suppliers must submit a comprehensive method statement that responds to the Scope of Work and outlines the proposed approach/methodology for the installation and hosting project. The method statement should clearly articulate the added value the Tenderer will bring to achieve the stated objectives of the project..	30
MINIMUM QUALIFYING POINTS		70
TOTAL POINTS		100

TENDERER'S EXPERIENCE

The experience of the Tenderer or joint venture partners in the case of an unincorporated joint venture or consortium will be evaluated on the basis of experience in similar projects or similar areas and conditions in relation to the scope of work.

The evaluation will consider experience in relation to the management of programmes and projects and the provision of cloud hosting services

Tenderers should very briefly describe his or her experience in this regard relevant to the scope of work and attach this to this schedule.

The description should be put in tabular form with the following headings:

Project name	Period/Year	Value of work inclusive of VAT (Rand)	Client	Contact Details

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

Note to tenderer: only information relating to similar projects is to be provided in the above table.

Scoring of the Tenderer’s experience will be as follows: (40)

TENDERER’S EXPERIENCE

DESCRIPTION	MAX POSSIBLE SCORE
Company experience in projects comprising of hosting cloud based systems, with specific emphasis on Learning Management Systems such as Moodle <2 projects – 0 points 2 projects – 50 points 3 projects – 70 points, 4 projects – --80 points 5 projects----- 90 points >=6 projects----100 points	100



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

TENDERER'S EXPERIENCE (Continued)

INSERT HERE

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

KEY PERSONNEL ASSIGNED TO THE WORK

Insert in the table below the key personnel and their proposed function

KEY PERSONNEL SCHEDULE

No.	Proposed Function	Key Person Name
1.	Project Manager	
2.	Technical Specialist – Software Engineer	
3.	Technical Specialist Database Administrator	
4.	Help Desk Management	
5.		
6.		
7.		
8.		

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

EXPERIENCE OF KEY PERSONNEL

Provide relevant information as prescribed below for the following Key Persons proposed in the tender to fulfil the following positions:

Key Person Positions

- A Project Manager
- B Technical Specialist Software Engineer
- C Technical Specialist – Database Admin
- D Help Desk

The experience of each key person, relevant to the scope of work, will be evaluated from the points below:

- General experience (total duration of activity), level of education and training and positions held by the key person.
- The education, training and experience of the person, in the specific sector, field, subject, etc which is directly linked to the scope of work.

A CV of each key person of not more than 3 pages should be attached to this schedule.

Each CV should be structured under the following headings:

- Personal particulars
 - name
 - date and place of birth
 - place (s) of tertiary education and dates associated therewith
- Qualifications
- Name of current employer and position in enterprise
- Overview last 10 years of experience (year, organization, position and projects)
- Outline of recent assignments / experience that has a bearing on the scope of work

The scoring of the experience of key staff will be as follows: 30

Experience of key personnel in the following fields: The proposed project team for the project including CV's showing experience in projects of a similar nature. This must include details of the Project Manager, Technical Experts and support team proposed for project and must demonstrate the overall multi-disciplinary capability of the team and internal support structures. Experience of Project Manager in managing Cloud Systems <2yrs – 0 points 2yrs – 15 points >=3yrs – 25 points RESOURCE 2 Technical Specialist - Software Engineer <2yrs – 0 points 2yrs – 15 points >=3yrs – 25 points	100
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REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

RESOURCE 3 Technical Specialist – Database Admin

- <2yrs – 0 points
- 2yrs – 15 points
- >=3yrs – 25 points

RESOURCE 4 Help Desk

- <2yrs – 0 points
- 1-2yrs – 15 points
- >=2yrs – 25 points

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

EXPERIENCE OF KEY PERSONNEL (Continued)

INSERT KEY PERSONNEL CVs HERE

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

PROPOSED ORGANIZATION AND STAFFING

Suppliers must propose the structure and composition of their team for the installation, hosting, and support of the project. The submission should include the following elements:

1. **Team Structure:**
 - Outline the main disciplines involved in the project including CPG Partner.
 - Identify the key staff members or experts responsible for each discipline.
2. **Key Staff Members/Experts:**
 - Provide detailed job descriptions for each key staff member or expert.
 - Specify the roles and responsibilities of each key staff member or expert.
3. **Technical and Support Staff and CPG Partner**
 - List the proposed technical and support staff, including their roles and responsibilities.
 - Describe the site staff (if applicable) and their specific functions.
4. **Team Composition for Associations/Joint Ventures/Consortiums:**
 - If the proposal is from an association, joint venture, or consortium, indicate how the duties and responsibilities will be shared among the entities.
 - Clearly define the collaboration structure and communication channels.

The submission should demonstrate a well-organized team with the necessary expertise and clearly defined roles to ensure successful execution of the Education Sales Management System, Learner Relationship Management System, and API installation, hosting, and support of the project.

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

PROPOSED ORGANIZATION AND STAFFING (Continued)

INSERT HERE

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

METHOD STATEMENT

Suppliers must submit a comprehensive method statement that responds to the Scope of Work and outlines the proposed approach/methodology for the

- a) Education Sales Management System,
- b) Learner Relationship Management System, and
- c) API to interface above systems.

The method statement should clearly articulate the added value the Tenderer will bring to achieve the stated objectives of the project.

The method statement should include the following elements:

1. **Understanding of Objectives:**
 - Explain your understanding of the objectives of the Education Sales Management System, Learner Relationship Management System, and API to interface above systems.
 - Address UWS's stated and implied requirements.
 - Highlight key issues of importance related to the project.
2. **Technical Approach:**
 - Describe the technical approach you will adopt to meet the project objectives.
 - Explain the methodologies to be used and their compatibility with the proposed approach.
3. **Implementation Plan:**
 - Provide a detailed plan for the installation and configuration of the Education Sales Management System, Learner Relationship Management System, and API interface.
 - Outline the steps for data migration, testing, and validation.
4. **Hosting Solution:**
 - Describe the hosting environment and setup.
 - Detail the maintenance plan, including updates, backups, and security measures.
5. **Support and Help Desk Services:**
 - Define the support structure, levels, and roles, including the role of the local CPG partner
 - Explain the support processes, tools, and help desk operations.
 - Include procedures for user training and documentation.
6. **Quality Plan:**
 - Outline the quality control measures to be implemented.
 - Describe the processes, procedures, and resources to ensure quality.
 - Indicate who will be responsible for each aspect and when it will be applied.
7. **Risk Management:**
 - Identify potential risks and their impact on the project.
 - Describe risk mitigation strategies and how risks will be managed.
8. **Value Management:**
 - Explain what contribution can be made regarding value management.
 - Highlight how your approach adds value to the project.

Submission Format

- Attach your detailed approach paper to this page.
- The approach paper should not exceed 8 pages.

The submitted method statement will be evaluated based on the clarity and depth of the proposed approach, the understanding of project objectives, the feasibility and effectiveness of the technical approach, the robustness of the quality and risk management plans, and the overall value added by the Tenderer.

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

METHOD STATEMENT

The scoring of the approach paper will be as follows: [30]

Technical approach and methodology	
No submission (score 0)	No Method Statement submitted
Poor	The technical approach and / or methodology is poor / is unlikely to satisfy project objectives or requirements. The Tenderer has misunderstood certain aspects of the scope of work and does not deal with the critical aspects of the project.
(score 40)	The approach is generic but tailored to address the general project objectives and methodology. The approach does not deal with the critical characteristics of the project. The quality plan, manner in which risk is to be managed is very generic.
Satisfactory	The approach is specifically tailored to address the specific project objectives and methodology and is sufficiently flexible to accommodate changes that may occur during execution. The quality plan and approach to managing risk is specifically tailored to the critical characteristics of the project.
(score 70)	Besides meeting the “good” rating, the important issues are approached in an innovative and efficient way, indicating that the Tenderer has outstanding knowledge of state-of-the- art approaches. The approach paper details ways to improve the project outcomes and the quality of the outputs.



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

METHOD STATEMENT (Continued)

INSERT HERE

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

Third Stage: Price and Preference

- 1.1.1 Subsequent to the evaluation of essential minimum criteria and functional criteria, the third stage of evaluation of the bids will be in respect of price and preferential procurement only.
- 1.1.2 Price proposals should be submitted in South African Rand including Value Added Tax (VAT) where applicable
- 1.1.3 The bidder shall provide the price proposal as detailed in SBD 3.1
- 1.1.4 In compliance with the Preferential Procurement Regulations 2022, the following preference point systems are applicable to invitations to tender, The 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 1.1.5 Points for this bid shall be awarded for:

Price; and (80 Points)

Preference Goals as defined in SBD 6.1 (20 Points)

The Preference Goals that have been identified for this bid is stipulated in SBD 6.1

- 1.1.6 Failure on the part of a bidder 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
- 1.1.7 UWS reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by UWS.
- 1.1.8 UWS reserves the right to conduct negotiations with the qualifying bidder/s regarding any terms and conditions, including price(s), of a proposed contract where applicable
- 1.1.9 UWS reserves the right not to accept the lowest financial offer or any offer

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

11. CONTRACT PARTICIPATION GOALS

11.1 Tenderers are required to achieve at least 20% Contract Participation Goals (CPG) including a minimum 10% Black Women participation and another 10% for Local participation of the value of goods, services and Works paid to one or more targeted enterprises in compliance with Umgeni Water Services' Enterprise and Development.

11.2 This will require tenderers to commit as part of their scope of work, a certain value of supplies, services or works for which the tenderer will contract targeted enterprises expressed as 20% of the total contract value

11.3 Objective of CPG Programme

The objective of Umgeni Water Services empowerment initiative is to bring about meaningful transformation in all procurement projects through achieving one or more of the following objectives:

- a) Meaningful Economic Participation;
- b) Local Economic Development;
- c) Transfer of Technical, Management and Entrepreneurial Skills; and
- d) Creation of sustainable Black Enterprises

11.4 Contract Participation Goals

Contract Participation Goal (CPG) – the **final** value of services paid to the CPG Partner/s based on the **final** contract value.

At the time of awarding the contract the 20% minimum CPG amount will be based on the contract award value exclusive of the following:

- VAT,
- CPA and (If applicable)
- Contingencies. (if applicable)

During contract implementation, adjustments relating to Provisional Sums and Contingencies linked to the CPG allocation will be agreed upon between the parties to the contract, as and when the need arises.

CPG Partner/s – Service provider/s selected from Umgeni Water Services Supply Chain

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

Management (SCM) . However, should the UWS not contain suitable CPG Partner/s, the tenderer may propose suitable CPG Partner/s for Umgeni Water Services consideration.

Tenderers (the main Service Provider irrespective of BBBEE classification) who are on Umgeni Water Services SCM list are not exempt from this requirement and are still required to have a CPG Partner.

Tenderers are required to achieve at least 20% Contract Participation Goals (CPG) including a minimum 10% Black Women participation and another 10% for Local participation of the value of goods, services and Works paid to one or more enterprises (CPG Partner/s)

- 20% includes any special materials
- 20% excludes VAT, CPA and Contingencies.
- The tenderer will be required to achieve the actual Rand value committed for CPG, adjusted according to the following:
 - Variation Orders – Each VO will be evaluated by the Employer's Agent and the Project Manager to determine whether it should be counted, in its entirety or partially, as part of CPG or not.
 - Re-measurable Items (including CPA, and provisional sums) – Each re-measurable item change will be evaluated by the Employer's Agent and the Project Manager to determine whether it should be counted as part of CPG or not.

Within 2 weeks of the award of contract, the tenderer will be required to submit a cash flow projection for the main contractor and the CPG Partner/s

12. Applicability

The CPG target is applicable to all contracts to be adjudicated through the Umgeni Water Services procurement process and shall be achieved through the following mechanisms:-

- a) CPG Partner/s selection is concluded **after** adjudication of tenders and **before** contract award is made.

The CPG Partner/s shall be selected according to the following criteria:

- (i) CPG Partner/s are to be obtained from Umgeni Water Services list of Service Providers specifically earmarked for CPG purposes.
- (ii) In the event of services where Umgeni Water Services does not have an applicable service provider on its database, the tenderer may propose a suitable CPG Partner/s for consideration by Umgeni Water Services.

- b) Main service provider may propose a suitable CPG Partner/s, but Umgeni Water Services reserves the right to provide or arrange a CPG Partner/s to work with the successful company.

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

- c) Sub-contracting of the CPG Partner/s at the same rate / price that the tenderer would have offered to Umgeni Water Services whilst making profit margins consistent to the profit margins that the main Service Provider would have made under normal trading processes.
- d) Value of the work to be sub contracted shall be at least 20% **(minimum of 10% shall be due to Black Women participation and another 10% for Local participation)** of the total contract value excluding VAT, CPA and Contingencies.
- e) CPA is payable to the CPG Partner/s as per the indices stipulated in the contract document.
- f) The work allocated to the CPG Partner shall be performed by the CPG Partner directly and may not be allocated or sub-contracted out to other contractors/consultants/service providers.
- g) The main Service Provider **shall not** substitute any CPG Partner/s without the written approval of Umgeni Water Services.
- h) The working capital arrangements between the main Service Provider and the CPG Partner/s must be agreed upon between the two parties prior to commencement of works to ensure that the CPG Partner does not have cash flow challenges during contract implementation.

13. Invoicing and Payment

The monthly measurement and payment will be according to the following guideline:

- a) Submission of payment certificate by the Service Provider– by 25th of each month, or the nearest previous working day. The submission from the Service Provider shall include the signature of the CPG Partner indicating agreement with the measurements and rates applicable to the work undertaken by the CPG Partner.
- b) Payment to the Service Provider – on the last day of the following month;
- c) The CPG Partner must be paid within reasonable time but no later than 3 working days after the Main Service Provider has been paid by Umgeni Water Services; and
- d) The submission from the Service Provider must include a schedule that clearly shows the following:
 - (i) Total Contract Sum
 - (ii) Total amount payable to CPG Partner/s excluding current month
 - (iii) Amount payable to CPG Partner for current month
 - (iv) % split of Total amount payable to Main Service Provider and CPG Partner/s

14 Monitoring and Reporting on CPG

- a) Umgeni Water Services will monitor CPG implementation on site. This may include direct contact with CPG Partner/s on site for verification purposes.
- b) The CPG Partner shall be in agreement with the measurement and payment for work completed, for the purposes of submitting payment certificates, as determined by the Service

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

Provider. Should disagreements arise, Umgenezi Water Services reserves the right to intervene to resolve the disagreement.

- c) CPG Partner/s shall attend all contractual meetings relevant to their scope of work including contract award negotiations, monthly contract site meetings and technical meetings where applicable.



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

PRICING SCHEDULE – FIRM PRICES (PURCHASES)

NOTE:

- Only firm prices will be accepted. Non-Firm prices (including prices subject to rates of exchange variations) will not be considered
- In cases where different delivery points influence the pricing, a separate pricing schedule must be submitted for each delivery point

Name of bidder _____ RFQ number _____
Closing Time _____ Closing date _____

OFFER TO BE VALID FOR _____ CALENDER DAYS FROM THE CLOSING DATE OF QUOTE.

Item no.	QUANTITY	UNIT OF MEASURE	DESCRIPTION	UNIT PRICE	TOTAL
1.	1	SUM	Education Sales Management System Onboarding & Training		
2.	1	YEAR	Education Sales Management System Subscription fee Year 1		
3.	1	YEAR	Education Sales Management System Subscription fee Year 2		
4	1	SUM	Learner Relationship Management System, Onboarding/ Training		
5	1	YEAR	Learner Relationship Management System, Subscription fee Year 1		
6	1	YEAR	Learner Relationship Management System, Subscription fee Year 2		
7	1	YEAR	API to interface above systems with Moodle Subscription Fee Year 1		
8	1	YEAR	API to interface above systems with Moodle Subscription Fee Year 2		
SUB TOTAL				R	
20% CPG				R	
VAT @ 15%				R	
GRAND TOTAL (Price SA Rands with all applicable taxes included)				R	
I (full name) _____, in my capacity as _____, the duly authorized representative of _____ (business name) hereby declares that the offer is in accordance with the attached specification, notes to suppliers & accepts all conditions/clauses contained in the said documents.					
Signature of duly authorized representative _____					DATE: _____ _____

AUTHORITY TO SIGN



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

RFQ NO: _____

Description: _____

Close Corporation / Company / Partnership / Trust /Sole proprietor or Sole trader

Company Name: _____

Registration Number: _____

Resolution Of The Directors Of The Company etc. resolved that _____, in his/her capacity as _____, is authorized to make applications on behalf of the Close Corporation / Company / Partnership / Trust /Sole proprietor or sole trader for:

Any documentation relating to the business (which is not necessarily a change of ownership). The nominated person will also have access to webpage for the business. Signature(s) for Close Corporation / Company / Partnership / Trust/ Sole proprietor or sole trader.

(Sole member still must sign this resolution)

Signature of members:

Name	Signature	Date
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____

NB: FAILURE TO COMPLETE, SIGN AND DATE THE RESOLUTION AS OUTLINED ABOVE WILL RESULT IN THE TENDERER RENDERED INCOMPLETE, ALTERNATIVELY THE TENDERER MAY ATTACH A SIGNED COMPANY RESOLUTION ON A COMPANY LETTERHEAD

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

SBD 4 - 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:

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

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.

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

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.
- 3.5 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

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.

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

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

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022 (SBD 6.1)

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

	REQUEST FOR QUOTATION		Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM		

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,



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

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
 - (b) 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	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)
The promotion of enterprises located in a KZN	10	
An entity which is at least 51% owned by black people	10	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm _____

4.4. Company registration number:

TYPE OF COMPANY/ FIRM [TICK APPLICABLE BOX]

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



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

☐ State Owned Company

- 4.5. 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: _____

	REQUEST FOR QUOTATION	Form No: UW-RFQ-1 Version No: 1/2024 Effective Date: Jul 2024
	RFQ Number: Q25/009/ZM	

OFFICIAL BRIEFING SESSION/SITE INSPECTION CERTIFICATE

Q25/009/ZM- PROVISION OF STUDENT SALES MANAGEMENT SYSTEM AND LEARNER/CUSTOMER RELATION MANAGEMENT SYSTEM AND API;S FOR UMGENI WATER SERVICES FOR A PERIOD OF 2 YEARS

THIS IS TO CERTIFY THAT (NAME)

ON BEHALF OF

ATTENDED THE NON COMPULSORY BRIEFING SESSION AT **UMGENI WATER SERVICES** AS FOLLOWS:

Venue: Durban Heights Training Centre
 88 Dunkeld Rd, Reservoir Hills,
 Durban, 4091
 Date: TBC
 Time: TBC

Alternative teams meeting:
 Meeting ID:
 Passcode:

AND IS THEREFORE FAMILIAR WITH THE CIRCUMSTANCES AND THE SCOPE OF THE SERVICE TO BE RENDERED.

TENDERER'S SIGNATURE /REPRESENTATIVE

DATE:_____

UMGENI WATER SERVICES SCM REPRESENTATIVE
 (PRINT NAME)

SIGNATURE



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

SBD 7.2 CONTRACT FORM - RENDERING OF SERVICES

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

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

1. I hereby undertake to render services described in the attached bidding documents to Umgeni Water Services in accordance with the requirements and task directives / proposals specifications stipulated in above-mentioned RFQ Number at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Proof of tax compliance status;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
 - Bidder's Disclosure form;
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) _____

CAPACITY _____

SIGNATURE _____

NAME OF TENDERER _____

DATE _____

WITNESSES

1. _____

2. _____

DATE: _____



REQUEST FOR QUOTATION

RFQ Number: Q25/009/ZM

Form No: UW-RFQ-1
Version No: 1/2024
Effective Date: Jul 2024

CONTRACT FORM - RENDERING OF SERVICES (SBD 7.2)

PART 2 (TO BE FILLED IN BY THE PURCHASER)

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

DESCRIPTION OF SERVICE	
PRICE (ALL APPLICABLE TAXES INCLUDED)	
CONTRACT TERM / COMPLETION DATE	
TOTAL PREFERENCE POINTS CLAIMED	
POINTS CLAIMED FOR SPECIFIC GOAL 1	
POINTS CLAIMED FOR SPECIFIC GOAL 2	

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

SIGNED AT _____

ON: _____

NAME (PRINT): _____

SIGNATURE: _____

OFFICIAL STAMP

--

WITNESSES

1. _____

2. _____

DATE: _____