



**cooperative
governance**
Department:
Cooperative Governance
REPUBLIC OF SOUTH AFRICA



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MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)

REFERENCE NO: MISA/HR/EHWM/028/2021/22

APPOINTMENT OF A BIDDER TO PROVIDE EMPLOYEE HEALTH AND WELLNESS MANAGEMENT SERVICES AT MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)

August 2021

Beneficiary	Municipal Infrastructure Support Agent
Contact Person	Ms. Lumka Tyikwe: 012 848 5325 or Lumka.tyikwe@misa.gov.za
Postal Address	1303 Heuwel Avenue, Riverside Office Park, Letaba House, Centurion 0046
Project Name	Appointment of a bidder to provide Employee Health and Wellness Management Services for the Municipal Infrastructure Support Agent (MISA).
Reference No.	MISA/HR/EHWM/028/2021/22
Online Briefing Session Date	02 September 2021
Closing Date and time	13 September 2021 @11:00am

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1. INVITATION

- 1.1 The Municipal Infrastructure Support Agent (MISA) intends to provide Employee Health and Wellness Management Services for the Municipal Infrastructure Support Agent (MISA).

2. DURATION

- 2.1 The bidder is required to provide this service over a period of thirty-six (36) months. MISA may extend the duration at its discretion if necessary.

3. BACKGROUND

- 3.1 The Municipal Infrastructure Support Agent (MISA) is a government component in terms of section 7(5)(c) of the Public Service Act, 1994 (promulgated under Proclamation No. 103 of 1994). It has been established under the executive authority of the Minister for Cooperative Governance and Traditional Affairs, with the Department of Cooperative Governance (DCoG) as its principal department. Accordingly, MISA operates within the department's broader legislative and policy mandates.

3.2. MISA's objectives are:

- To support municipalities to effectively undertake Comprehensive Infrastructure Planning.
- To support municipalities to procure and develop their infrastructure effectively and efficiently.
- To support the management of (infrastructure) operations and ensure a proper maintenance programme for municipal infrastructure.
- To provide specialized technical and management support to municipalities to ensure accelerated delivery of municipal infrastructure and service provision.
- To develop and coordinate the strengthening of technical capacity in municipalities and within the sector as well as facilitate increased access to funding; and
- To monitor the efficiency, effectiveness and impact of infrastructure projects and support initiatives.

- 3.3. MISA is in the process of implementing an integrated health and wellness programme in line with the National Mental Health Policy Framework and Strategic Plan (2013 -2020), as proposed by the South African Government, to uphold and monitor wellness within the organization, for the promotion, prevention, and treatment of Mental Health Disorders.

4. OBJECTIVES

- 4.1 MISA does not have, in its staff establishment, the capacity to undertake the employee health and wellness internally, and thus requires the services of a reputable Employee Health and Wellness Service Provider to assist therein.

- 4.2 The successful bidder is expected to make available at least four (4) resources to be

accessible to MISA employees virtually and/or on-site as and when required for the duration of services. The resources must be registered counsellors and have the skill and capacity to provide the required services.

4.3 The integrated wellness programme should address and monitor the following key areas: -

- a) **Prevention of Harm** which requires support employee health and psychological wellbeing through the prevention of harm and identification of potential hazards.
- b) **Promotion of Health** to optimize health and psychological wellbeing, by encouraging a culture of wellness, inclusive of mind, body, and spirit.
- c) **Resolution of Occurrences or Harm** to support employee health and psychological wellbeing through the respectful resolution of occurrences or taking corrective action against potential harm.
- d) **Organizational Culture** to promote a work environment of psychological wellbeing by monitoring employee engagement and perception of the workplace.
- e) **Sustainability & Continual Improvement** to assesses the work environment on a continual basis to improve employees' psychological wellbeing.

4.4 Proposed fees with detailed cost breakdown must be quoted for the different levels of resources to be made available clearly stating rates of each team member.

5. SCOPE OF WORK

The successful bidder is expected to provide Employee Health and Wellness programmes to alleviate and assist in eliminating workplace and workforce problems by providing supportive, diagnostic, referral and counselling treatment services to MISA employees: These services include:

SERVICES	TYPE OF SERVICE
5.1 on-site and telephone counselling.	24/7 access to services by employees
5.2 referral for psychological symptoms or mental health disorders (e.g., depression, stress, anxiety).	referrals as per the cases identified
5.3 marital or family-related issues.	counselling sessions
5.4 legal and financial problems.	1 workshop/ information session conducted per annum for employees
5.5 catastrophic medical problems (e.g., AIDS, Cancer, COVID-19, Substance Abuse).	counselling sessions
5.6 pre-retirement planning needs.	annual session for qualifying employees
5.7 career-related difficulties.	assessments conducted for employees
5.8 organisational effectiveness and development programmes.	assessments relating to effectiveness and development programmes conducted per employee category

5.9 management skills on Emotional Intelligence (EQ)	workshops conducted for management (4 interventions per annum)
5.10 nurse-on-site for employee wellness check-up including tests for glucose, cholesterol, BMI, Blood pressure, etc.	Conducted on a quarterly basis

6. PROJECT OUTPUT AND OUTCOMES

- 6.1 The service provider will be expected to provide the following to the satisfaction of MISA:
- a) Physical Wellness (Individual) – promotion of physical activity, good nutrition, healthy sleeping, management of substance abuse and awareness and wellness education
 - b) Psycho-social Wellness (Individual) – stress management, substance abuse management, economic/ financial stress management and counselling services.
 - c) Organisational Wellness – management of workplace interpersonal relations (bullying), change management and
 - d) Work Life Balance – introduction of flexible policies, retirement programme and mainstreaming of gender, disability, and youth into wellness programme.
- 6.2 The Service Provider will be expected to produce detailed monthly reports detailing how each service category has been utilised as per the set MISA service standards including recommendations on where MISA management needs to intervene.
- 6.3 A record of engagements with MISA staff and stakeholders.
- 6.4 Further, it is expected that all data, information, reports, and any other documents required by MISA management relating to services rendered will be made available by the Service Provider at any point in time subject to prior proper arrangement.
- 6.5 The resources made available by the service provider must be able to travel to all sites where MISA offers support throughout the country. All cost related to travelling and accommodation will be the expense of MISA. All travel must be prior approved by MISA.

7. PROJECT MANAGEMENT

The MISA Project Manager is the Director: Human Resource Management & Development.

8. TECHNICAL PROPOSAL

Bidders must submit the following: -

- 8.1 A proposal covering the intended approach and methodology covering the following areas: -
- a) Psychological and Emotional Wellness
 - b) Physical Wellness
 - c) HIV/AIDS Management
 - d) Drug and alcohol management
 - e) Work-life Balance

- f) Organisational effectiveness and development programmes.
- g) Reporting

8.2 A company profile that highlights experience in providing employee wellness services.

8.3 At least three client reference letters of similar projects undertaken by the company in a medium to large complex organisation, preferably public sector.

8.4 Team leader’s curriculum vitae showing experience in Employee Health and Wellness and Counselling services, as well as certified copies of a tertiary qualification in the field of Clinical Psychology and Counselling or related equivalent tertiary qualifications and professional registration with the HPCSA.

8.5 Curriculum vitae of three (3) additional resources with relevant experience in Counselling, Employee Health and wellness services, as well as certified copies of a tertiary qualification in the field of Psychology and Counselling or related equivalent tertiary qualifications and professional registration with the HPCSA.

9. FINANCIAL PROPOSAL

9.1 Pricing:

9.1.1 The pricing schedule must include all costs involved and the bidder must indicate discount price and any special conditions attached to the discount and price offer where applicable.

9.2 Pricing Schedule:

Deliverables	Quantity	Rate Yr1	Rate Yr2	Rate Yr3	Total Price
7 on-site/telephone with employee and/or immediate family members/ per employee	Rate per 1 hour session				
Referral for psychological assistance per incident/per employee	Referral fee/ per employee/ per assistance				
Legal and financial workshops	Rate per workshop per annum				
Catastrophic specialist counselling services (HIV/Dread Diseases, Substance abuse)	Rate 1 hour per session				
Pre-retirement planning session per employee	Rate per employee				
Career-related	Rate per				

difficulties	employee				
Management skills training	Rate per workshop				
Battery tests conducted for SMS	Rate per test				
Travelling costs	MISA tariffs per km				
Retainer fee for services	Rate per employees/per month				
Reporting indicating employee usage of services	Rate per report (monthly reports)				
GRAND TOTAL					

10. EVALUATION CRITERIA

Bids are invited based on submission of proposal and will be evaluated in three stages, namely pre-qualification, functionality, price and B-BEEE.

NB: Bidders (and as well as each member of JV or consortium or partnership agreement) must submit proof of registration with the National Treasury's centralised supplier database Bidders must ensure that they are registered on the CSD before bid closing date and before they submit bid proposals.

10.1 STAGE 1 – PRE-QUALIFICATION

Mandatory documents

- 10.1.1 Proposal
- 10.1.2 Five (5) reference letters on the company letter head detailing the experience of the bidder.
- 10.1.3 Detailed CVs, certified copies of qualifications and proof of registration with HPCSA of all key personnel (background, field of specialisation, and experience of team members)
- 10.1.4 Partnership agreements (if a partnership has a partnership agreement in place that enables the partnership to automatically continue to function in the event of a death or withdrawal of one of the partners)
- 10.1.5 Completed and appropriately signed SBD Forms: SBD 1, SBD 3.3, SBD 4, SBD 6.1, SBD 8, and SBD 9

All bids will be pre-qualified to ensure compliance to mandatory requirements. Should the mandatory requirements as stated above not be met, bids will be considered as non-responsive and will be disqualified.

Non-mandatory Documents

- 10.1.6 Company Profile
- 10.1.7 BBBEE Certificate

10.1.8 SARS Tax Clearance Certificate or Pin verification code together with copy of tax clearance certificate (Verification will be done by MISA with SARS prior to appointment)

10.2 STAGE 2 - FUNCTIONALITY EVALUATION

10.2.1 The following criteria and weights will be applied when bids are evaluated on functionality:

	REQUIRED COMPETENCIES	POINTS
1.	<p>Company Experience: A minimum of five (5) years' experience is required in providing similar services with minimum five (5) reference letters from contactable and verifiable references on the company's letterhead.</p> <p>less than 5 years = 0 points 5 years = 2 points Above 5 but less than 10 years = 3 points 10 years and above = 5 points</p>	5
2.	<p>Team Leader</p> <p>Qualification Degree / Honours Degree / Post Graduate Diploma / Master's Degree in Clinical and Counselling Psychology, registered with HPCSA</p> <ul style="list-style-type: none"> • Degree / B- Tech = 1 points • Honours Degree = 3 points • Master's degree and above = 5 points 	5
	<p>Experience No. of years' experience in field of Clinical and Counselling Psychology at managerial level:</p> <p>Less than 5 years = 0 points 5 years = 2 points Above 5 but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points</p>	10
3.	<p>Resource 1</p> <p>Qualifications Degree / Honours Degree / Postgraduate Diploma/ Master's Degree in Clinical and Counselling Psychology, registered with HPCSA</p> <p>Degree = 1 points Hons Degree/ Postgraduate Diploma = 3 points Master's Degree = 5 points</p>	5
	<p>Experience No. of years' experience in field of Clinical and Counselling Psychology as Mental Health Wellness Specialists:</p> <p>Less than 5 years = 0 points 5 years = 3 points</p>	10

	<p>Above 5 but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points</p>	
4.	Resource 2	
	<p>Qualifications Degree / Honours Degree / Postgraduate Diploma/ Master's Degree in Clinical and Counselling Psychology, registered with HPCSA</p> <p>Degree = 1 points Hons Degree/ Postgraduate Diploma = 3 points Master's Degree = 5 points</p>	5
	<p>Experience No. of years' experience in field of Clinical and Counselling Psychology as Mental Health Wellness Specialists:</p> <p>Less than 5 years = 0 points 5 years = 3 points Above 5 but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points</p>	10
5.	Resource 3	
	<p>Qualifications Degree / Honours Degree / Postgraduate Diploma/ Master's Degree in Clinical and Counselling Psychology, registered with HPCSA.</p> <p>Degree = 1 points Hons Degree/ Postgraduate Diploma = 3 points Master's Degree = 5 points</p>	5
	<p>Experience No. of years' experience in field of Clinical and Counselling Psychology as Mental Health Wellness Specialists:</p> <p>Less than 5 years = 0 points 5 years = 3 points Above 5 but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points</p>	10
6.	<p>Project Plan/ Proposal:</p> <ul style="list-style-type: none"> • Psychological and Emotional Wellness = 5 points • Physical Wellness = 5 points • HIV/AIDS Management = 5 points • Drug and alcohol management = 5 points • Work-life Balance = 5 points • Reporting = 5 points • Organisational effectiveness and development programmes = 5 points 	35
	TOTAL =	100

10.2.2 FUNCTIONALITY

Service providers need to score a minimum of **75 points** on functionality to go through to price and BEE evaluation.

10.3 STAGE 3 - PRICE AND BBEE

Points for B-BBEE Status Level of Contribution (P_p)

Maximum of **20 points** are allocated for Preferential Procurement Goal. Preference point must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of point (80/20 system)
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Points for Bid Price (P_s)

Maximum of 80 points are allocated to Bid Price on the following basis:

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

10

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Where,

- P_s = Points scored for comparative price of the Bid under consideration
- P_t = Comparative price of the Bid under consideration
- P_{min} = Comparative price of lowest qualified Bid

A tenderer may not be awarded points for B-BBEE status level of contributor if the tender documents indicate that the tenderer intends subcontracting more than 25% of the value of the contract to any other person not qualifying for at least the points that the tenderer qualifies for, unless the intended subcontractor is an EME that has the capability to execute the subcontract.

11. MISA'S RIGHTS

- 11.1 MISA reserves the right to cancel this bid in whole or in part, at its sole discretion, at any time before the Agreement is fully executed.
- 11.2 This Bid does not commit MISA to award an Agreement, to pay any costs incurred by bidders in the preparation of their proposals submitted in response to this Bid, or to procure or contract for services.
- 11.3 MISA reserves the right to conduct vetting and verify the validity of all certificates submitted by bidders.
- 11.4. MISA will reject any proposal as non-responsive that does not provide evidence of the specified mandatory requirements. MISA may or may not request additional information and clarification during the evaluation process from any or all bidders regarding their proposals
- 11.5 MISA reserves the right to request the company's latest audited financial statement to ascertain financial stability of the bidder prior to the award of the bid.

12. REPORTING

- 12.1. The appointed bidder will report to the appointed Project Manager of MISA. The detailed reporting requirements will be provided to the successful bidder during the contract negotiation and project inception.
- 12.2. The bidder must submit a written report to the MISA Project Manager on specific problems, recommendations, improvement methods, work programmes, personnel turnover, tenants' complaints, remedial actions taken and all other matter relating to provision of security services.

13. PAYMENTS

- 13.1. MISA does not pay any amount in advance. Only original signed invoices must be submitted for payments. The bidder will be paid within **30** days after receipt of valid

invoice, when the services have been fully rendered to the satisfaction of MISA, and this done by means of electronic transfer directly into the bidder's bank account.

14. BRIEFING SESSION (NON-COMPULSORY)

- 14.1. Bidders are invited to attend a non-compulsory briefing session that will be held online. Briefing session link shall be made available on the Briefing session date and time.

15. SUBMISSION OF PROPOSALS

- 15.1. The Tender Documents will be made available on www.misa.gov.za and will be uploaded on the e-Tender Portal. The Tender Documents are not for sale and will also not be emailed to bidders. The Tender Documents must also include a soft copy (DVD or Memory Stick - all in PDF Format) of the proposal, and to reach MISA offices before 11:00 on the 13 September 2021 and must be enclosed in a sealed envelope clearly inscribed on the outside:

BID REFERENCE NUMBER: MISA/HR/EHWM/028/2021/22

CLOSING DATE AND TIME: 13 September 2021 @ 11:00am

- 15.2. Tender documents are to be submitted to MISA Reception and deposited in the tender box at MISA Offices, Letaba House, 1303 Heuwel Road, Riverside Office Park, Centurion, 0046.
- 15.3. No late submissions will be considered under any circumstances.

16. PERIOD FOR ACCEPTANCE OF PROPOSALS

- 16.1. To allow for adequate evaluation, MISA requires a response to this bid to be valid and irrevocable for 90 days after closing date and time.

17. COMMUNICATION WITH MISA OFFICIALS

- 17.1. Bidders and their representatives may not communicate with MISA officials except in writing. Bidders and their representatives must communicate in the manner set forth in this Bid. There shall be no communication with MISA officials except as may be reasonably necessary to carry out the procedures specified in this Bid. Nothing herein prohibits bidders and their representatives from making oral statements or presentations in public to one or more MISA officials during a public meeting.

18. CONFIDENTIALITY

- 18.1 All responses to this Bid become property of MISA and submissions after closing of bid may be subject to public inspection and disclosure in accordance with the MISA SCM Policy and provisions of applicable legislation.

19. QUESTIONS AND REQUESTS FOR CLARIFICATIONS

19.1 Bidders must carefully examine the bid documents and in the event of doubt of anything contained in the documents. All enquiries should be made at the briefing session and can also be made in writing five (5) working days before the closing date of the Bid. For queries, please contact the following person:

Ms. L. Tyikwe

E-mail: lumka.tyikwe@misa.gov.za

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)			
BID NUMBER:		CLOSING DATE:	
DESCRIPTION			
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)			
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON		CONTACT PERSON	
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS		E-MAIL ADDRESS	
SUPPLIER INFORMATION			
NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE	NUMBER	
CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE	NUMBER	
E-MAIL ADDRESS			
VAT REGISTRATION NUMBER			
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	OR	CENTRAL SUPPLIER DATABASE No: MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS			
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?		<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?		<input type="checkbox"/> YES <input type="checkbox"/> 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 PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

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

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO:
CLOSING TIME 11:00	CLOSING DATE.....

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

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

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3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION

HOURLY RATE

DAILY RATE

R _____

R _____

R _____

R _____

R _____

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

R _____ days

R _____ days

R _____ days

R _____ days

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

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
_____	R.....
_____	R.....
_____	R.....
_____	R.....

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
_____	R.....
_____	R.....
_____	R.....
_____	R.....

TOTAL: R.....

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

Name of Bidder:

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

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

- 6. Period required for commencement with project after acceptance of bid
.....
- 7. Estimated man-days for completion of project
.....
- 8. Are the rates quoted firm for the full period of contract? *YES/NO
- 9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
.....
.....
.....

~~*[DELETE IF NOT APPLICABLE]~~

Any enquiries regarding bidding procedures may be directed to the –
(INSERT NAME AND ADDRESS OF DEPARTMENT/ENTITY)

Tel:
Or for technical information –
(INSERT NAME OF CONTACT PERSON)

Tel:

DECLARATION OF INTEREST

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

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

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

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:

2.3 Position occupied in the Company (director, trustee, shareholder²):

2.4 Company Registration Number:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

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

¹"State" means –

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

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

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:
Name of state institution at which you or the person connected to the bidder is employed :
Position occupied in the state institution:

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

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

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

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

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

.....
.....
.....

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

2.8.1 If so, furnish particulars:

.....
.....
.....

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

4 DECLARATION

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

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH
23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE
FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

May 2011

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL
PROCUREMENT REGULATIONS 2017**

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- 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

- a) The value of this bid is estimated to exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the preference point system shall be applicable; or
- b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	
B-BBEE STATUS LEVEL OF CONTRIBUTOR	
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser 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 the purchaser.

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)
 (Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at least 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		

Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
 - One person business/sole propriety
 - Close corporation
 - Company
 - (Pty) Limited
- [TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

- Manufacturer
 - Supplier
 - Professional service provider
 - Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a

fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

WITNESSES 1. 2.
--

..... SIGNATURE(S) OF BIDDERS(S) DATE: ADDRESS
--

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	<p>Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		

4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

SBD 8

CERTIFICATION

**I, THE UNDERSIGNED (FULL NAME).....
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION
FORM IS TRUE AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT,
ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION
PROVE TO BE FALSE.**

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Js365bW

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (III) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *per se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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 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.

10. 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.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Js914w 2