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MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)

REFERENCE NO: MISA/TST/020/2023/24

APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF TECHNICAL SKILLS TRAINING COURSES TO MUNICIPAL OFFICIALS FEBRUARY 2024

Beneficiary	Municipal Infrastructure Support Agent
Contact SCM	Tenders@misa.gov.za or 012 848 5300
Postal Address	1303 Heuwel Avenue, Riverside Office Park, Letaba House, Centurion 0046
Project Name	Appointment of a service provider for provision of technical skills training courses to municipal officials
Reference No.	MISA/TST/020/2023/24
Briefing Date	22 FEBRUARY 2024
Closing Date	08 MARCH 2024 @ 11H00AM
Total Tender Amount	
BBB-EE	

**APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF TECHNICAL SKILLS TRAINING COURSES TO
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**APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF TECHNICAL SKILLS TRAINING COURSES TO
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**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)									
BID NUMBER:	MISA/TST/020/2023/24	CLOSING DATE:08 MARCH 2024				CLOSING TIME:		11H00	
DESCRIPTION									
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)									
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO					TECHNICAL ENQUIRIES MAY BE DIRECTED TO:				
CONTACT PERSON					CONTACT PERSON				
TELEPHONE NUMBER					TELEPHONE NUMBER				
FACSIMILE NUMBER					FACSIMILE NUMBER				
E-MAIL ADDRESS					E-MAIL ADDRESS				
SUPPLIER INFORMATION									
NAME OF BIDDER									
POSTAL ADDRESS									
STREET ADDRESS									
TELEPHONE NUMBER	CODE				NUMBER				
CELLPHONE NUMBER									
FACSIMILE NUMBER	CODE				NUMBER				
E-MAIL ADDRESS									
VAT REGISTRATION NUMBER									
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:				OR	CENTRAL SUPPLIER DATABASE No:	MAAA		
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]				ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES 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.									

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**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....

2. 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

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.

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2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, _____ the _____ undersigned,
(name)..... in submitting
the accompanying bid, do hereby make the following statements that I certify to be
true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

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.

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- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

..... Signature Date
..... Position Name of bidder

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1. INVITATION

- 1.1 The Municipal Infrastructure Support Agent (MISA) hereby invites accredited or validated training service providers to submit proposals for the provision of technical courses to municipal officials. MISA has a mandate to provide infrastructure related technical support to municipalities and assist them in building their technical capacity to sustainably render services to communities.
- 1.2 MISA has to achieve this strategic mandate through the provision of technical support and strengthening of municipal capacity to plan, deliver, operate and maintain infrastructure. It, therefore, intends to contract accredited or validated training service providers to offer short courses to municipal officials in the following (infrastructure related) technical areas:
- 1.2.1 Infrastructure procurement,
 - 1.2.2 Infrastructure planning, delivery, operation, and maintenance,
 - 1.2.3 Property valuation,
 - 1.2.4 Project life cycle management,
 - 1.2.5 Contract Management,
 - 1.2.6 Technical and business report writing,
 - 1.2.7 Infrastructure asset management,
 - 1.2.8 Labour intensive construction methods,
 - 1.2.9 Accounting standards for property plant and equipment,
 - 1.2.10 Revenue enhancement and billing,
 - 1.2.11 Development planning,
 - 1.2.12 Town and regional planning,
 - 1.2.13 Solid Waste Management; and
 - 1.2.14 Geographic Information System.

2. BACKGROUND

- 2.1 MISA is a government component, in the Department of Cooperative Governance (DCoG), established in terms of Section 7(5) (c) of the Public Service Act of 1994 (as amended) and in terms of Government Gazette No 36634/2013. It has been established to provide technical advice and strengthen the capacity of municipalities to plan, deliver, operate, and maintain infrastructure effectively and efficiently.
- 2.2 To execute its mandate, MISA invites qualified and interested training service providers with capacity to provide training courses in the abovementioned technical areas. In evaluating the bids, **preference will be given to bidders who**

**shall have submitted evidence of accreditation or validation by relevant
authoritiesⁱ or councilsⁱⁱ to provide training in the area(s) of interest.**

3. PROJECT OBJECTIVES

- 3.1 The objectives of this capacity development support initiative are to:
 - 3.1.1 Develop scarce skills in local government for the eradication of back logs and improved operations and maintenance of infrastructure.
 - 3.1.2 Provide in-service technical training courses to municipal officials.
 - 3.1.3 Optimize professionalization of municipal officials in compliance with statutory provisions for technical professions.
 - 3.1.4 Create institutional management capacity.
 - 3.1.5 Apply education and training development initiatives to close the scarce technical skills gaps.
 - 3.1.6 Develop and close skills gaps in low and medium capacity municipalities through skills transfer; and
 - 3.1.7 Provide platforms for municipal officials to share technical skills and insights in the management of municipal infrastructure.
- 3.2 This Terms of Reference (TOR), therefore, seeks the services of a service provider, with requisite accreditation/validation, capability, and capacity to submit proposals for the provision of technical training programmes/courses to municipal officials.

4. SCOPE OF WORK

- 4.1 If appointed, the contracted training service provider will be expected to train 1500 municipal officials over 36 months period and will be responsible for the following:
 - 4.1.1 Planning, design, preparation, organization, and delivery of training sessions,
 - 4.1.2 Development and implementation of appropriate training methodology including suggestions and ideas for the training events,
 - 4.1.3 Mobilization of participants (municipal officials) and trainers for each event,
 - 4.1.4 Preparation, printing, and delivery of all training materials including teaching aids and materials to accompany each training event,
 - 4.1.5 Organizing coordination sessions between the training provider and MISA,
 - 4.1.6 Evaluation of feedback and the training events,
 - 4.1.7 Provision of reports on the evaluation, impact and outcomes of the training events,
 - 4.1.8 Delivery of training through subject matter experts, as facilitators,
 - 4.1.9 Portfolio workshop within one month after the date of training, including preparation of the master Portfolio of Evidence (POE) file,
 - 4.1.10 Assessment of all portfolios of evidence within three weeks of receipt from course attendees (where necessary),

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- 4.1.11 Provision of learner guidance and support during and after the portfolio workshop. This may take the form of post-training hands-on support, which will require MISA pre-approval,
 - 4.1.12 Moderation of POEs within four weeks from the date of training (if necessary).
 - 4.1.13 Certification of learners (attendance certificates); and
 - 4.1.14 Provide own travel, accommodation and meals for the facilitator(s) during training.
- 4.2 The training provider is required to take full responsibility for the content and quality of the training material as well as the quality standards and availability of trainers and facilitators. All trainers and facilitators must be fluent in English. The training materials must be made available in English.
- 4.3 Training seminars should include case studies and exercises, where appropriate, with question-and-answer sessions and panel discussions. Where appropriate, training events, which include computer-based exercises and case studies would be a major plus.
- 4.4 The Training provider should be a specialist in their own field(s) and have in-depth practical insight of the topics. Sub-contracting of the services to other companies or individuals is not permitted without prior written approval from MISA. A person awarded a contract may not subcontract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBBEE status level of contributor than the person concerned, unless the contract is subcontracted to an EME that has the capability and ability to execute the subcontract.
- 4.5 The service provider should have the capacity to provide both physical and virtual training sessions.

5. ORGANISATION OF TRAINING EVENTS

- 5.1 The training provider will be responsible for the complete organisation of each training event, including the following tasks:
- 5.1.1 Recruitment and registration of participants,
 - 5.1.2 Venue identification and recommendation to MISA,
 - 5.1.3 Event preparation, set up and hosting; and
 - 5.1.4 Provision of training material.
- 5.2 The training provider shall solicit MISA prior approval before a venue is confirmed for any training session. MISA shall, through its Travel Agency, be responsible for booking training venues and providing catering for all participants. In all cases, the location of the training events should be easily accessible.
- 5.3 The venue for a training event must be adequately equipped, modern and comfortable with proper audio-visual systems. The training provider will always

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ensure that training venues and material are, conspicuously, MISA branded. Depending on the requirements of the course offered, the training provider will recommend to MISA for syndicate rooms.

6. QUALITY ASSURANCE AND PROJECT MANAGER

- 6.1 The appointed training provider shall ensure that the quality of the events is continuously monitored. Copies of the feedback forms and results of the analysis of the feedback should be provided to MISA, within a month, after each training event.
- 6.2 The training provider shall appoint a **quality assurer** and a **project manager** who will be responsible for monitoring and management of the project. The project manager shall be a relationship manager and act as a single point of contact between MISA and the training service provider. The relationship manager should respond to email queries and phone calls within 24 hours and resolve outstanding issues within three working days.
- 6.3 In the event that MISA is not satisfied with the performance or behavior of a facilitator provided by the training service provider, the provider will be obliged to supply a suitable replacement. The training service provider will seek MISA's prior approval of the replacement, based upon an examination of the replacement's credentials.

7. CORE OCCUPATIONS AND PROJECT TEAM

- 7.1 As a minimum, bidders are expected to demonstrate capacity to provide training in the following core occupations:
- 7.1.1 Civil Engineering,
 - 7.1.2 Electrical Engineering,
 - 7.1.3 Construction and Project and Management,
 - 7.1.4 Town and Regional Planning,
 - 7.1.5 Solid Waste Management,
 - 7.1.6 Geographic Information Systems; and
 - 7.1.7 Property Valuation

8. COURSE DURATION, ASSESSMENT AND CERTIFICATION

- 8.1 Each course should be conducted over a minimum period of 2 days of physical and/or virtual classroom attendance. The service provider will also provide feedback on summative assessment (where necessary), per course conducted, within 30 days from the date of the course. Assessment should include a breakdown of:

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- 8.1.1 Expected group work and class tests (continuous formative assessment) during the 2-day course.
- 8.1.2 Summative assessment activities that must be completed after the course work within a specific timeframe to demonstrate the participant's ability to apply knowledge and skills gained during the course (where necessary).
- 8.1.3 Evidence of post-training hands-on support provided (where necessary and consent has been provided by MISA).
- 8.1.4 Upon completion of each course work, it is expected that participating municipal officials will receive a certificate of attendance issued by the relevant service provider.
- 8.1.5 Written prior approval will be sought from MISA, before any training that is anticipated to take more than two days is conducted.
- 8.1.6 A typical day at the training should be structured as follows:
 - 08H30: Registration / Login
 - 09H00: Welcome and Introduction
 - 09H15: Session 1
 - 10H15: Session 2
 - 11H15: Coffee/Tea Break
 - 11H45: Session 3
 - 12H45: Lunch
 - 13H45: Session 4 and exercise or case study
 - 15H00: Coffee/Tea Break
 - 15H30: Session 5 and exercise or case study
 - 17H00: End

9. SCHEDULE OF TECHNICAL SKILLS TRAINING COURSES

- 9.1 The table below presents the technical fields that are relevant to MISA's support to municipalities. The Service provider is expected to list at least three courses per field, for which they have accreditation or validation to offer from the relevant authority or statutory body.
- 9.2 **Proof(s) of accreditation or validation needs to be attached to assist MISA during the evaluation process. Continuous Professional Development points should be indicated** per accredited or validated training course or learning programme.
- 9.3 The information provided in the table is expected to demonstrate the bidder's capacity to execute the project. Although points will be scored for the number of relevantⁱⁱⁱ courses indicated, failure to indicate training courses under a particular technical field will disadvantage the bidder during the evaluation process.

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Technical Field/Area	Name/Title of Accredited / Validated Course ³	Name of Authority or Statutory Body	Name of Accredited Facilitator/ Trainer/ Instructor	CPD Points
Infrastructure Procurement				
Infrastructure Planning, Delivery, Operation and Maintenance				
Property Valuation				
Project Life Cycle Management				
Contract Management				
Technical Business Report Writing				
Infrastructure Asset Management				
Labour Intensive Construction Methods				
Accounting Standards for Property Plant and Equipment				
Revenue Enhancement and Billing				
Development Planning				
Town and Regional Planning				
Solid Waste Management				
Geographic Information System				

10. PROJECT OUTPUTS AND OUTCOMES

- 10.1 The training courses offered should contribute towards the professional development of the participants through continuous professional development (CPD) points.
- 10.2 The training should assist in enhancing technical skills of municipal officials to plan, deliver, operate, and maintain infrastructure for water, sanitation, roads, storm-water drainage, electricity, and solid waste.

³ Service provider should offer CPD courses which have been validated by the relevant Statutory Council/authority, where such a system is in place. Where CPD courses are not validated by the relevant Statutory Council/authority, they should be reviewed by a subject matter expert. The CV of the subject matter expert should be submitted to MISA for review purposes.

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10.3 The expected strategic outputs of the training include:

10.3.1 An increase in the technical skills and on-the-job knowledge base of municipal technical managers.

10.3.2 An increase in the number of professionally registered municipal officials who are able to maintain their registration status; and

10.3.3 Increased institutional and management capacity of technical and planning departments in municipalities.

10.4 Municipal officials should also understand the Infrastructure Asset Management guidelines produced by government through the various custodians of infrastructure norms and standards.

11. PROJECT DURATION AND TIMEFRAMES

11.1 The appointed service provider will be contracted to provide training services for a period of 36 months from the date of award. The project is expected to start in January 2025.

12. COMPANY EXPERIENCE AND COMPETENCY

12.1 Detailed company profile with the following information:

12.1.1 Provide details of the head office location in the company profile.

12.1.2 Provide the year of the establishment of the business in the company profile.

12.1.3 Provide instances of company' experience to provide similar training services as detailed in these TOR's.

12.2 At least 3 reference letters from enterprises and or public institutions detailing the types of training provided and successfully completed in the last 5 years. The letters must be dated, signed and on client's letterhead.

12.3 Copies of qualifications of project team.

12.4 Provide an accreditation and/ or validation certificate or letter from the relevant authorities or councils to provide training in the area(s) of interest.

12.5 The project team that will be assigned to MISA must have a minimum of ten (10) years' experience in providing similar training sessions as described in the TOR's.

12.6 Bidders are expected to use the table below to present the names and credentials of key personnel, namely the project manager, the quality assurer, and at least four facilitators. The facilitators should be from different technical fields.

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Personnel	Qualifications	Years of Experience	Number of Similar Projects Successfully Undertaken	Registration/Accreditation/Validation by Professional Body (E.g., ECSA)
Project Manager				
Quality Assurer				
Facilitators (Four)				

13. EVALUATION OF PROPOSALS

The bid will be evaluated based on three stages:

13.1 FIRST STAGE: MANDATORY REQUIREMENTS

Only those bidders who satisfy the following eligibility criteria and who provided the required evidence in their submissions are eligible to respond to the **BID: “Establishment of a panel of Training Service Providers to Provide Occupational Skills Training for Enhanced Operation and Maintenance of Municipal Infrastructure and Equipment”** and have their submissions evaluated. The Pre-Evaluation Stage will assess submission of the following:

13.1.1 In case of a Joint Venture/Consortium submission, shall submit a Joint Venture agreement signed by all parties.

13.1.2 Is registered in terms of the Companies Act, 2008 (Act 71 of 2008) or Close Corporation Act, 1984, (Act No. 69 of 1984) or, if a partnership, has a partnership agreement (buy and sell agreement for participating partners in this tender) in place that enables the partnership to automatically continue to function in the event of death or withdrawal of one of the partners.

13.1.3 In case of having a subsidiary arrangement, shall submit an audited proof (letter or shareholding certificate) of agreement between the holding company and the subsidiary.

13.1.4 None of the documents with correction fluid on them. Any wrong entry, in case of correction, it must be cancelled by a single stroke and initialled by the Authorised signatory.

13.1.5 The tender documents issued by MISA are not tampered and remain intact.

13.1.6 Accurately completed and signed the following form:

a) SBD4 Declaration of Interest.

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13.2 SECOND STAGE: TECHNICAL FUNCTIONALITY

13.2.1 The bidder that complies with **ALL** requirements in the first stage will be evaluated for Technical Functionality.

SELECTION CRITERIA	Maximum no. of points	Points Scored
1. Company. registration/accreditation/ validation by relevant professional /statutory bodies or by relevant authorities as a training service provider (Bidders are expected to submit proof from the authorities or professional/statutory bodies)	8 Points	
<p>a) The company is not registered/accredited/ and or validated by any of the relevant authorities. = 0 points</p> <p>b) The company is registered/accredited/ and or validated by one of the relevant authorities. = 6 points</p> <p>c) The company is registered/accredited/ and or validated by more than one of the relevant authorities. = 8 points</p>		
2. Company Experience Evidence of the company's experience, within the past five years, in implementing similar projects. (Reference letters in client's letter head must be provided). <p>a) less than 3 reference letters = 0 point</p> <p>b) 3 reference letters = 3 points</p> <p>c) 4 reference letters = 6 points</p> <p>d) 5 and above reference letters = 10 points</p>	10 points	
3. Total number of relevant CPD points-carrying training courses accredited or validated by the relevant professional/ statutory bodies or authorities. Submit proof of course accreditation or validation. The bidder will be scored zero (0) for non-submission of proof of accreditation or validation. <p>a) Less than 3 relevant CPD points carrying courses accredited/validated = 3 points</p> <p>b) 3 to 5 relevant CPD points carrying courses accredited/validated = 6 Points</p> <p>c) More than 5 relevant CPD points carrying courses accredited/validated = 10 Points</p>	10 Points	

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4. Project Manager with relevant qualification, experience and registration with or accreditation/validation by relevant professional/statutory bodies. (As per the service delivery areas or categories under Clause 7.1, namely, Civil Engineering, Electrical Engineering, Construction and Project and Management, Town and Regional Planning, Solid Waste Management, Geographic Information Systems; and Property Valuation		
4.1 Registration/ accreditation and or validation by relevant professional/statutory bodies or authorities. Bidders are expected to submit proof of professional registration from their statutory bodies and or from relevant authorities. a) Less than one Registration / accreditation/ validation = 0 point b) One Registration / accreditation/ validation = 3 points c) More than one Registration / accreditation/ validation = 5 points	(5 Points)	
4.2. Relevant Qualifications (as per the service delivery areas or categories under Clause 7.1, namely, Civil Engineering, Electrical Engineering, Construction and Project and Management, Town and Regional Planning, Solid Waste Management, Geographic Information Systems; and Property Valuation. a) National Diploma/Degree = 3 points b) Honours or Post graduate Diploma = 5 points c) Masters/Doctorate = 10 points	(10 Points)	
4.3. Experience of Project Manager (Proposed project leader/manager has experience of previously undertaking training projects (references to be provided on the CV). Failure to outline these experiences will lead to bidder being scored zero (0) point. a) Undertaken successfully 1 to 2 projects of a similar nature = 2 points b) Undertaken successfully 3 to 4 projects of a similar nature = 4 points c) Undertaken successfully 5 or more projects of a similar nature = 8 points	(8 points)	

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<p>5. Four (4) Facilitators with relevant qualification, experience and registration with or accreditation/validation by relevant professional/statutory bodies and or authorities. (As per the service delivery areas or categories under Clause 7.1, namely, Civil Engineering, Electrical Engineering, Construction and Project and Management, Town and Regional Planning, Solid Waste Management, Geographic Information Systems; and Property Valuation).</p>		
<p>5.1. Registration with or accreditation/validation by relevant professional/statutory and or authorities. Bidders are expected to submit proof of professional registration from their statutory bodies (10 points)</p> <p>a) 1 facilitator with or registration/accreditation and or validation by relevant professional/ statutory and authorities = 3 points</p> <p>b) 2 to 3 facilitators with or registration/accreditation and or validation by relevant professional statutory = 6 points</p> <p>c) 4 and above facilitators with or registration/accreditation and or validation by relevant professional statutory = 10 points</p>	(10 points)	
<p>5.2. Relevant Qualifications submitted for each of the 4 Facilitators (as per the service delivery areas or categories under Clause 7.1, namely, Civil Engineering, Electrical Engineering, Construction and Project and Management, Town and Regional Planning, Solid Waste Management, Geographic Information Systems; and Property Valuation</p> <p>a) National Diploma/Degree = 1 point</p> <p>b) Honours or Post graduate Diploma = 2 points</p> <p>c) Masters/Doctorate = 3 points</p>	(12 Points)	
<p>5.3. Number of Experienced Facilitators/Trainers (with more than ten years facilitation experience across the 7-delivery area)</p> <p>a) 1 facilitator with 10 years' experience = 3 points</p> <p>b) 2 to 3 facilitators 10 years' experience = 6 points</p> <p>c) 4 facilitators 10 years' experience = 10 points</p>	(10 Points)	

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6. Quality Assurer: Relevant Qualifications Facilitators (as per the service delivery areas or categories under Clause 7.1, namely, Civil Engineering, Electrical Engineering, Construction and Project and Management, Town and Regional Planning, Solid Waste Management, Geographic Information Systems; and Property Valuation a) National Diploma/Degree = 2 points b) Honours or Post graduate Diploma = 4 points c) Masters/Doctorate = 6 points	6 points	
7. Approach paper/ Methodology The approach paper must respond to the scope of work and outline the proposed approach/ methodology. (11 points) Presentation of an organogram of team (2) Work schedule deliverables with time frames breakdown schedule (4) Monitoring and Management Plan (2) Risk plan (3) with mitigation measures (3)	11 Points	
Total	100	

The threshold for this bid is **70 points**. Only bidders who meet and exceed the threshold score will proceed to the next stage of evaluation.

13.3 THIRD STAGE: PRICE AND SPECIFIC GOALS IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

THE SPECIFIC GOALS TO BE USED FOR THIS BID WILL BE B-BBEE STATUS LEVEL CONTRIBUTOR WILL BE MEASURED AS FOLLOWS. The 80/20 preference point system will be applicable to this bid.

NB: Bidders are required to submit valid BBBEE certificate or affidavit stating the valid BBBEE status level.

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

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

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SBD 6.1

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

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

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

1. GENERAL CONDITIONS

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

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

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

.(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the 80/20 preference point system.
- b) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

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- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)} \end{array}$$

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)} \end{array}$$

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (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

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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 is B-BBEE Status Level OF CONTRIBUTOR	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed. (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
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	0	0		

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company _____ registration _____ number: _____

4.5. TYPE OF COMPANY/ FIRM

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

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[TICK APPLICABLE BOX]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

 SIGNATURE(S) OF TENDERER(S)
SURNAME AND NAME:
DATE:
ADDRESS:

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14. COSTING

- 14.1. Costing should be inclusive of VAT, disbursements and annual escalation projections. Bidders should factor into their bid proposals costs related to branding of training venues and material with approved MISA corporate branding. Branding will imply:

14.1.1 MISA-branded Course Advertising and Promotion Material

14.1.2 One MISA-branded Pull Up Banner (Single-sided Economy Pull Up Banner base with supporting Pole, Non-curl PVC print, 2000 x 850mm finished size),

14.1.3 MISA-Branded Presentations,

14.1.4 MISA Branded Attendance Registers; and

14.1.5 MISA-Branded handouts (Water marked).

- 14.2 Bidders are expected to structure their costing as follows:

Item	Description	Quantity	Rate	Amount
1	Course advertising and promotion			
2	Course Delivery			
3	Branding			
4	Reporting and Quality Assurance			
5	Disbursement			

- 14.3 Course delivery costs will be inclusive of general administrative overhead costs, training material, facilitation/training costs, assessment fees, and certification fees.

- 14.4 Bidders are not expected to include costs for venues and meals, since MISA will make provision for such. Venues for the courses shall be accessible and be arranged by MISA's Travel Agency.

NB: The appointed training service provider will be expected to train 25 learners at a given time or per class and 500 learners per annum, totalling to 1500 over 36 months of the contract period.

- 14.5 MISA will **NOT** supply the appointed service provider with lists of municipal officials to be trained. Training will happen across the nine provinces of the country.

- 14.6 Bidders are not expected to include costs for venues and meals, since MISA will make provision for such. Venues for the courses shall be accessible and be arranged by MISA's Travel Agency. Each training session will last for two days.

- 14.7 **NB:** The appointed training service provider will be expected to conduct at least 20 training courses in one financial year. Each training course will cater for an average

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of 25 municipal officials. Any additional training course(s) will be per arrangement between MISA and the service provider.

14.8 The below table is prescribed for presenting all the courses that the service provider has capacity to offer:

Technical Field/Area	Name of Accredited / Validated Course ⁴	Name of Statutory Body	Name of Accredited Facilitator/ Trainer/ Instructor	CPD Points
Infrastructure Procurement				
Infrastructure Planning, Delivery, Operation and Maintenance				
Property Valuation				
Project Life Cycle Management				
Contract Management				
Technical Business Report Writing				
Infrastructure Asset Management				
Labour Intensive Construction Methods				
Accounting Standards for Property Plant and Equipment				
Revenue Enhancement and Billing				
Development Planning				

⁴ Service provider should offer CPD courses which have been validated by the relevant Statutory Council/authority, where such a system is in place. Where CPD courses are not validated by the relevant Statutory Council/authority, they should be reviewed by a subject matter expert. The CV of the subject matter expert should be submitted to MISA for review purposes.

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Town and Regional Planning				
Solid Waste Management				
Geographic Information System				

NB: The Bidder is not bound to bid for all the technical fields / areas.

15. MISA'S RIGHTS

- 15.1 MISA reserves the right to cancel this solicitation in whole or in part, at its sole discretion, at any time before the Agreement is fully executed,
- 15.2 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,
- 15.3 MISA reserves the right to conduct vetting and verify the validity of all certificates,
- 15.4 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 and selection process from any or all bidders regarding their proposals,
- 15.5 Municipal Infrastructure Support Agent (MISA) reserves the right to request the company's latest audited financial statement in order to ascertain financial stability of the bidder prior to the award of the bid,
- 15.6 MISA reserves the right to verify the authenticity of all documents requested.

16. REPORTING

- 16.1 The appointed bidder will report to the appointed Head: Technical Skills. The detailed reporting requirements will be provided to the successful bidder during the contract negotiation and project inception.
- 16.2 The bidder must submit a written report to the Head: Technical Skills on specific problems, recommendations, improvement methods, work programme, personnel turnover, tenants' complaints, remedial actions taken and all other matter relating to provision of server services.

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17. PAYMENTS

- 17.1 MISA does not pay any amount in advance. Only original signed invoices must be submitted for payments. The appointed service 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.

18. BRIEFING SESSION

- 18.1 There will be a virtual non-compulsory briefing session on the 22 February 2024 at 10am. **A teams virtual meeting link will be uploaded on MISA website.**

19. SUBMISSION OF PROPOSALS

- 19.1 The Tender Documents must also include a soft copy (Memory Stick - all in PDF Format) of the proposal, and to reach the offices of the MISA before and must be enclosed in a sealed envelope clearly inscribed on the outside.
- 19.2 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.
- 19.3 Please note that the tender closes punctually at **11am on the 08 March 2024**. No late submissions will be considered under any circumstances.

20. PERIOD FOR ACCEPTANCE OF PROPOSALS

- 20.1 In order to allow for adequate evaluation, MISA requires a response to this solicitation to be valid and irrevocable for 120 working days after submittal date and time.

21. COMMUNICATION WITH MISA OFFICIALS

- 21.1 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.

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22. CONFIDENTIALITY

22.1 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.

23. QUESTIONS AND REQUESTS FOR CLARIFICATIONS

23.1 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: Mr. Anele Ndamase; E-mail: tenders@misa.gov.za

ⁱ Authorities refer to recognised Sector Education Training Authorities, Institutions of Higher Learning, and Professional Bodies (such as Voluntary Associations).

ⁱⁱ Councils refers to statutory professional bodies such as ECSA, SACPCMP, SACPLAN, SACNASP, SACPVP, etc.

ⁱⁱⁱ A relevant course should be addressing at least one of the technical fields that are listed under section 4.11.