

TERMS OF REFERENCE

FOR

THE APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF EMPLOYEE WELLNESS SERVICES TO ALL NDA EMPLOYEES OVER A PERIOD OF 60 MONTHS

BID NUMBER: NDA07/CS03/22

BRIEFING SESSION	A COMPULSORY BRIEFING SESSION WILL BE HELD ON THE 20th JANUARY 2023 @10:00
VENUE	NDA HEAD OFFICE, MAIN BOARDROOM at 26 Wellington Road, Parktown, Johannesburg.
CLOSING DATE	03rd FEBRUARY 2023
CLOSING TIME	12H00
SUBMISSION OF DOCUMENTS	<p>All proposals must be delivered at the NDA Head Office on or before the closing date and time. The Head Office address is: 26 Wellington Road, Parktown, Johannesburg, 2193. Submissions must be strictly submitted inside the tender box which is at the main entrance and accessible 24/7.</p> <p><i>Service providers outside of Gauteng are advised to send their documents by courier. NDA will not take responsibility for documents sent via postal services.</i></p>
SUPPLIER ENVELOPES	<p>The supplier's envelope/s MUST clearly have the description of the RFP "The Provision of Employment Wellness Services to all NDA Employees"</p> <p>A TWO-ENVELOPE system will be used for the submission of quotations:</p> <p>Commercial Envelope</p> <p>This envelope must contain price quotations plus all the mandatory documents as listed in section 9 of this document.</p> <p>Technical Envelope</p> <p>This envelope must contain all info listed in section 3 to 8 of this document.</p>
LATE BIDS	Bids received after the closing date and time will not be accepted for consideration and where practicable, will be returned unopened to the Bidder(s). Contact person for

QUERIES	<p>Commercial Queries: Contact Mr Muzi Matsenjwa/Mr Lunga Mbatha on 011 018-5562/5623 between 08h30 to 17h00 on weekdays. Queries can also be sent in writing to MuziM@nda.org.za/LungaMb@nda.org.za .Technical Queries: Contact Ms Rejoice Dzowa/Ms Basani Maluleke on +27 11 018-5500 Rejoiced@nda.org.za/Basanim@nda.org.za.</p>
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1. OVERVIEW OF THE NDA

- 1.1 The National Development Agency (NDA) reports to Parliament through the Department of Social Development. The NDA is classified as a public entity under schedule 3A of the Public Finance Management Act, 1999 (Act No. 1 of 1999), and was established in November 1998 by the National Development Act, 1998 (Act No. 108 of 1998) (NDA Act) as government's response to the challenge of poverty and its causes in South Africa.
- 1.2 The NDA derives its mandate from the National Development Agency Act, 1988 (Act No. 108 of 1998). In terms of the Act, the primary objective of the NDA is to contribute towards the eradication of poverty and its causes by granting funds to CSOs for the purposes of:
- (a) carrying out projects or programmes aimed at meeting the development needs of poor communities; and
 - (b) strengthening the institutional capacity of other CSOs involved in direct service provision to poor communities.
- 1.3 The secondary objects of the NDA in terms of the Act are-
- (a) to promote-
 - (i) consultation, dialogue and sharing of development experience between CSOs and relevant organs of State; and
 - (ii) debate on policy development
 - (b) to undertake research and publication aimed at providing the basis for development policy.
- 1.4 The NDA plays a critical role in contributing towards shifting the country from the scourge of poverty towards poverty eradication. Through the Act and various policies, the NDA contributes to – but is not limited to – the advancement of economic development, social cohesion, access to basic human rights and skills development. This contribution of the NDA supports the National Development Plan (NDP) 2030 outcomes for a greater and better South Africa.
- 1.5 The National Development Plan (NDP), the Medium-Term Strategic Framework (MTSF), Sector Plans and the United Nations Sustainable Development Goals (SDGs) guide the NDA's functions. The aim of the NDP is in line with the NDA's mandate. The NDP aims to reduce inequality and eliminate poverty by 2030.

2. PURPOSE OF THE REQUEST FOR BID (RFB)

The NDA seeks to appoint a credible, accredited and experienced service provider to submit a comprehensive proposal in respect of offering the Employee Health Wellness Programme (EHWP) to 200 NDA staff members nationwide. The EHWP service provider will provide a, three sixty-five (365) day, 24/7 confidential service through the service of a qualified, experienced, multilingual counsellor, offering both telephonic and face-to-face counselling. The duration of the contract with the selected service provider will be for five (5) years. The proposed budget should include all services mentioned in section 5 herein below.

3. SPECIFIC OBJECTIVES

This programme must contribute to the following objectives: -

- 3.1 To provide a professional, confidential, personal support and information service to NDA employees, spouse/ partner and their immediate families for a period of five (5) years.
- 3.2 Assist employees in preventing and/or remedying personal and family problems that adversely affect their well-being or potentially resulting in poor work performance.
- 3.3 Maintain and improve the general well-being of employees through activities designed for promoting healthy lifestyles.
- 3.4 Promote efficiency in the work place that increases the opportunity for employee well-being and enhanced work performance.
- 3.5 Provide immediate, short-term crisis intervention in the event of traumatic incidents.
- 3.6 Submission of annual implementation plan for Life Skills Development workshops by February of each year and Wellness Day Events as outlined in section 5.3 and 5.4 below.
- 3.7 Quarterly reports on progress providing information services rendered and statistics of assisted employees and recommendations thereof.

4 REQUIREMENTS FROM PARTICIPATING BIDDERS

The following criteria will be used to select a qualifying accredited service provider to participate in this programme.

Interested Service Providers must:

- 4.1 Be registered with a professional body EAPSA or HCPSA – Attach Proof.

- 4.2 Have capacity to offer Employee Wellness Programme for all services outlined in the scope of work in Section 5 below.
- 4.3 Be able to cover or have offices in all 9 provinces of South Africa: Attach Proof.
- 4.4 Be able to assist employees in all 11 official languages of South Africa.
- 4.5 Have a minimum of 5 years in providing the same services.
- 4.6 Must have professionally qualified lead staff to offer counselling to staff members: (eg. Psychologists, Legal Advisors, Financial Advisors and Social Workers) attach their brief CVs and professional membership certificates.
- 4.7 Provide quarterly report which indicate utilization of the EAP services and this report should be presented and interpreted to the NDA

5 SCOPE OF WORK

5.1 Employee Assistance Programme

The Service Provider is expected to provide employees of the NDA and their immediate families with professional assistance within 12-48 hours after the incident has occurred, covering the following, but not limited to :

- **Stress Management** (identifying the causes of stress, bereavement, coping strategies);
- **Financial Management** (money management, budgeting, credit and debt management etc);
- **Legal** (maintenance, child custody, divorce, customary law);
- **Relationship Management** (Marital, family and relationship problems, family, co-workers, partners, abusive relationships, friends);
- **Anti-Substance Abuse** (alcohol, drugs, prescription medication) and other addictive behaviors such as gambling;
- **Psychological Support** (Emotional or behavioral disorders)
- **Post Disaster Support** (COVID and other natural disasters)
- **Organizational Change Management**
- **Health Related Support** (chronic illnesses e.g. HIV, AIDS, cancer, nutritional and diet, vis major);
- **Work Related Support** (job burnout, poor work relationships, poor work performance, conflict resolution, career matters, harassment); and
- **Trauma Debriefing both individual and group counselling** (accidents, hijacking, loss, armed robberies).

5.2 Reporting Structure

Provision of quarterly and annual report which indicate utilization of the EAP services and other services rendered to the NDA staff. This report should be presented, analyzed and interpreted to the NDA with recommendations. Provide sample reporting, not limited to general reporting.

5.3 Annual Wellness Days

Wellness Days should be arranged annually per office (9 provincial offices and Head Office) as per this in section 7 below. Wellness Day events should cover the following but not limited to:

- Comprehensive Testing (Glucose, Cholesterol, BP, BMI, HIV etc)
- Dietician Services
- Eye / Vision Screening
- Blood Donation drives
- Massage
- Aerobics
- Financial Wellness Services / Debt management services
- Other Wellness Activities that the service provider can provide

5.4 Life Skills development workshops

The Service Provider should conduct virtual/physical workshops to a maximum of four annually per office. These workshops include but not limited to Stress Management Workshops, HIV Awareness, Conflict Management Workshops, Change Management and other Wellness Awareness programmes, depending on the need at that time.

5.5 Awareness Communication Strategy

- Provision of monthly communication electronic brochures or posters based on national wellness calendar
- Provision of monthly Newsletters on health related issues
- Hold quarterly meetings with the NDA
- Virtual annual awareness session of the EAP services rendered by the service provider
- Attend induction sessions on ad hoc basis

6 PROPOSAL CONTENT

The proposal must include the following:

- 6.1 A technical proposal, with background of your organization, aims and objectives, methodology/approach that will be used in the implementation of the Employee Wellness Programme (EWP).
- 6.2 Organization profile including past experience in conducting Employee Wellness Programme (EWP), a list of lead staff member with 3 years' experience and their valid accreditation to implement the programme with their CVs and copies of qualifications.
- 6.3 A detailed proposal with activities and timeframes.
- 6.4 A detailed estimated budget with breakdown for providing this programme as indicated in section 5 above.

7 NDA EMPLOYEE COVERAGE FOR EWP

(Service provider must have scalability as this is a five-year contract and number of employees reflected below might change over the years)

OFFICE/ PROVINCE	ESTIMATED NUMBER OF EMPLOYEES FOR WELLNESS DAYS EVENTS
1. National Office (Gauteng)	67
2. Limpopo Province	15
3. Mpumalanga Province	13
4. Free State Province	11
5. North West Province	11
6. Northern Cape Province	10
7. Gauteng Province	12
8. Eastern Cape Province	15
9. KZN Province	15
10. Western Cape Province	12
TOTAL	180

8. TECHNICAL EVALUATION

Technical Evaluation will be scored as follows:

DESCRIPTION	WEIGHT 100 Points in Total
RELEVANT EXPERIENCE - Evidence of bidding companies previous Employee Wellness Programme (EWP) work undertaken in other organisations	44
1. Experience – in operation for a minimum of 5 years (2 marks) (Detailed Company Profile) with detailed capacity within the last 3 years (2 marks)	4
2. Footprints in the 9 provinces: <ul style="list-style-type: none"> • Submit evidence of physical addresses for offices/agreements with EWP professionals in the provinces and • Indicate the ability to assist employees in all 11 official languages of South Africa. 	9 1
3. A detailed project proposal in response to section 6.3 of the TORs including an annual work plan with activities and time frames	30
CAPACITY - Personnel (Submit as per 4.6)	50
1.Psychologists (submit as clarified in section 4.6)	16
2.Social Workers (submit as clarified in section 4.6)	16
3.Legal Advisors (submit as clarified in section 4.6)	9
4.Financial Advisors(submit as clarified in section 4.6)	9
REFERENCES	6
Three references for Employee Wellness Programme or Employee Assistance Programme done for other organisations	6
Submit three (3) reference letters. Reference letters must be on the referee's letterhead for work done within the last 3 years, signed by a duly authorized person, provide details of the services provided, and contract duration.	
Total score	100 Points
Minimum qualifying score	85 Points

8.1 Clarification of the above score system

- **Experience**
Interested services providers must be registered with a professional body EAPSA or HCPSA and attached proof, experience in operation for a minimum of 5 years (2 marks), a detailed company profile with detailed capacity within the last 3 years (2 marks)

- **Footprint = Total of 10 points (4.3)**

Service Providers must submit evidence of footprint in all 9 provinces (9 points) of South Africa. Evidence must be physical addresses for offices/agreements with professionals in the provinces indicate the ability to assist employees in all 11 official languages of South Africa. A total of 1 point per provincial footprint. 1 point will be allocated for mentioning a language in any of the agreements. Zero (0) points will be allocated should there be no footprint in a province.

- **Work plan = Total of 30 points (6.3)**

A detailed project proposal in response to section 6.3 of the TORs including an annual proposal with activities (5.3) and time frames (5.1) will score a total of 30 points. Submission of an annual work plan will be allocated 10 points, listing all relevant activities will be allocated 10 points and time frames will be allocated 10 points.

- **Capacity = Total of 50 points (6.2)**

Lead staff member must have 3 years' experience and submit their valid accreditation with relevant bodies, their CVs and copies of qualifications. Failure to submit evidence of registration with the relevant accreditation bodies will result to a score of zero (0) in the relevant category.

- **References = Total of 6 points**

Submit three (3) reference letters. Reference letters must be on the referee's letterhead for work done within the last 3 years, signed by a duly authorized person, provide details of the services provided, and contract duration, 2 points per reference letter will be allocated.

9. COMMERCIAL EVALUATION

- a. Bids will be evaluated in accordance with the Preferential Procurement Regulations, 2017, using the 80/20 preference points system as prescribed in the Preferential Procurement Policy Framework Act (PPPFA, Act 5 of 2000). The lowest acceptable bid will score 80 points for price and maximum of 20 points will be awarded for attaining the Broad-Based Black Economic Empowerment (B-BBEE) status level of contribution.

- b. The bid proposals received will be evaluated in two (2) phases. On the first phase bids will be evaluated on functionality and on the second phase in accordance with the 80/20 preference points system respectively.
- c. Bid proposal must score a minimum of eighty five (85) points or more out of hundred (100) points on functionality in order to qualify for advancement to the next phase of evaluation. Second phase, a bid proposal scoring less than eighty five(85) out of 100 will not be considered for further evaluation and will be disqualified.
- d. Phase two: During this phase, bid proposals that passed the first phase will be further evaluated based on the 80/20 preference points system in accordance with the PPPFA Act, where 80 points will be attained in respect of price (the lowest acceptable bid will score 80 points and bidders that quoted higher prices will score lower points for price on a pro-rata basis) and 20 points will be awarded for attaining the Broad-Based Economic Empowerment (B-BBEE) status level of contribution in accordance with the table below:

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

- e. In order to claim the B-BBEE Status Level of Contributor, bidders must submit Sworn Affidavits or original and valid B-BBEE Status Level Verification Certificates or certified copies thereof, issued by accredited Verification Agencies such as SANAS or Registered Auditor approved by the IRBA together with their bids, to substantiate their B-BBEE claims. Exempted Micro Enterprises must submit a letter from the Accounting Officer who is appointed in terms of the Close Corporation Act.
- f. Bidders who do not submit B-BBEE Status Level Verification Certificate or are non-compliant contributors to B-BBEE do not qualify for preference points for B-BBEE, but will not be disqualified from the bidding process. They will score points out of 80 for price only and zero (0) points out of 20 for B-BBEE.
- g. Bidders are requested to complete the preference claim form (SBD 6.1 and 6.2) in order to claim preference points.
- h. The highest ranked bidder will be awarded the bid. It should be noted also that the NDA reserves the right not to appoint any service provider and no service provider will be reimbursed for any costs incurred whilst participating in this bid.

10. JOINT VENTURES, CONSORTIUMS AND TRUSTS

A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity if the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. The NDA will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

When bidding through a Joint Venture, the Joint Ventures must submit a Consolidated B-BBEE certificate if it is not an incorporated entity when responding to tenders. This means that the bidder will have to obtain a new B-BBEE certificate for the Joint Venture, which consolidates each participant's B-BBEE status level.

11 SUB-CONTRACTING

Bidders/ tenderers who want to claim Preference points will have to fully comply with regulation 5 and 12(3) of the Preferential Procurement Regulations 2017 about sub-contracting which states that:

"(5) 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 capability to execute the subcontract.

12 (3) 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 an equal or higher B-BBEE 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

12 CLIENT BASE

The NDA reserves the right to contact references during the evaluation and adjudication process to obtain information.

13 PACKAGING OF THE BID DOCUMENTS

The bidder shall place both the sealed Technical Proposal and Price/ Commercial Proposal envelopes into an outer sealed envelope or package, and must be clearly marked as follows:

13.1 Functionality/Technical Envelope

Bid Ref: NDA07/CS03/22

Description: THE APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF EMPLOYMENT WELLNESS SERVICES TO ALL NDA EMPLOYEES OVER A PERIOD OF FIVE (5) YEARS

Bid closing date and time: 03rd February 2023 at 12h00

Name and address of the bidder:

NB: In this envelope, the bidder shall only address the technical aspects of the bid as per Section 8.

13.2 Pricing/Commercial Envelope

Bid Ref: NDA07/CS03/22

Description: THE APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF EMPLOYMENT WELLNESS SERVICES TO ALL NDA EMPLOYEES OVER A PERIOD OF FIVE (5) YEARS

Bid closing date and time: 03rd February 2023 at 12h00

Name and address of the bidder:

NB: In this envelope, the bidder shall only provide the price/commercial proposal and the Mandatory documents outlined in section 17 of the Terms of Reference.

14 PRICING

- 14.1 Service providers must give a detailed cost breakdown for all applicable costs e.g. Initial setup costs, Escalation costs and any other additional charges.
- 14.2 Service providers must indicate if their prices will be fixed and firm for the duration of the proposed contract period, if not, the proposed escalations should be clearly indicated on the proposal/quotation. All prices submitted must be inclusive of VAT
- 14.3 Service Providers must ensure that the quotes submitted have no arithmetic errors as NDA will not rectify any errors and no adjustments to quotations received will be

permitted after the closing date. The quotes should include all activities/services that will be required for the required services as no variations will be accepted unless mutually agreed by NDA and the service provider prior to contract acceptance.

- 14.4 Bidders will carry the responsibility of ensuring that the proposals submitted have been signed by a duly authorised person. Should it be established after the submission of proposals that the signatory authorising the proposal is not legally appointed by the service provider, the offer/proposal will be disqualified from the evaluation process.
- 14.5 All prices submitted should be typed in black ink or written in pen. No proposals written in pencil will be accepted or evaluated. Prices must show the total bid amount with vat included.
- 14.6 A two-envelope system will be used for the submission of proposals.

15 TENDER VALIDITY

All submitted bids must be valid for 150-days from the closing date of this bid.

16 NDA PAYMENT TERMS

Invoices will be paid 30-days from the date of submission and approval. All invoices should be forwarded to Invoices@nda.org.za

17 MANDATORY DOCUMENTS

- 17.1 Valid Tax Clearance Certificate issued by the South African Revenue Services (SARS) --- SARS tax pin and compliant CSD Report.
- 17.2 Signed agreements for joint ventures and/or consortium arrangements.
- 17.3 Company registration documents with the relevant authority (CIPC).
- 17.4 A letter/resolution authorising the person signing the bid documents and contracts.
- 17.5 All participating bidders must complete, sign and return (SBD1, 3.3,4 and 6.1) attached together with their proposals.
- 17.6 Bidders must submit a detailed cost breakdown for all applicable costs e.g. Initial setup costs, monthly costs, and any other applicable costs. All prices submitted must be inclusive of VAT.

Failure to complete and submit any of the attached documents will result in immediate disqualification.

18 CENTRAL SUPPLIER DATABASE

- 18.1 The NDA will not appoint any supplier who is not registered as a prospective supplier on the central supplier database as required in terms of National Treasury Circular No. 3 of 2015/2016 and National Treasury SCM Instruction note 4 of 2016/2017.

19 CONTRACT AWARD

A binding contract will be signed after both parties have fully agreed to the scope of work and all terms and conditions. The NDA legal department will develop a draft contract that shall be used as the basis to finalise contract terms and conditions.

20 DISCLAIMER

- 20.1 Whilst all due care has been taken in connection with the preparation of this bid, the NDA makes no representations or warranties that the content in this bid or any information communicated to or provided to bidders during the bidding process is, or will be, accurate, current or complete. The NDA and its officers and employees will not be liable for any information communicated which is not accurate, current or complete.
- 20.2 If a bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by the NDA (other than minor clerical matters); the bidder must promptly notify NDA in writing of such discrepancy, ambiguity, error or inconsistency to allow the NDA to consider what corrective action is necessary (if any).
- 20.3 Any actual discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the NDA will, if possible, be corrected and provided to all bidders without attribution to the bidder who provided the written notice.

- 20.4 No representations made by or on behalf of NDA about this bid will be binding on the NDA unless that representation is expressly incorporated into the contract ultimately entered into between NDA and the successful bidder.

21 ADDITIONS AND AMENDMENTS TO THE BID

- 21.1 The NDA reserves the right to change any information in, or to issue an addendum to this bid before the closing date and time. The NDA its officers and employees will not be liable in connection with either the exercise of or failure to exercise this right.
- 21.2. Should the NDA exercise its right to change the information in terms of clause 21.1 all amendments will be communicated to all bidders.

22 CONTENT PAGE

Participating bidders are required to submit a detailed content page and page dividers clearly indicating (cross-referencing) where each of the technical requirements is placed in their bid documents exactly as outlined in **section 8** (technical evaluation criteria) of this Terms of reference. Any additional information that the supplier would like to provide should be referenced as well on the content page.

23 PRICE NEGOTIATION

As guided by the Implementation Guide Preferential Procurement Regulations, 2017 of the PPPFA, Act No.5 of 2000, 19.2; the award of this tender may be subjected to price negotiation with the preferred tenderers.

24 SPECIAL CONDITIONS OF THIS BID

NDA reserves the right to;

- 24.1 To accept part of a tender rather than the whole tender.
- 24.2 To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the Bid.

- 24.3 To correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process.
- 24.4 To cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.
- 24.5 Award to multiple bidders based either on size or geographic considerations.

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	NDA07/CS03/22	CLOSING DATE:	3 February 2023	CLOSING TIME:	12:00
DESCRIPTION	The appointment of a service provider for the provision of employee wellness services to all National Development Agency (NDA) employees over a period of 60 months				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
26 Wellington Road					
Parktown					
Johannesburg					
2193					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Muzi Matsenjwa/Lunga Mbatha		CONTACT PERSON	Rejoice Dzowa	
TELEPHONE NUMBER	011 018-5562/5623		TELEPHONE NUMBER	011 018 5500	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	MuziM@nda.org.za / LungaMb@nda.org.za		E-MAIL ADDRESS	Rejoiced@nda.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <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 12:00	CLOSING DATE.....

OFFER TO BE VALID FOR ...150.....DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
---------	-------------	--

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. R.....

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.....

Name of Bidder:

..... R.....
TOTAL: R.....

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

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 –

National Development Agency
26 Wellington Road
Parktown

Tel: 011 018 5500

Or for technical information –

Rejoice Dzowa

Tel: 011 018 5500

Bid No.:

Name of Bidder:



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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.

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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Full Name	Identity Number	Name of State Institution

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

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related 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



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statements that I certify to be true and complete in every respect:

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

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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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

**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 last 51% owned by:	EME √	QSE √
Black people	<input type="checkbox"/>	<input type="checkbox"/>
Black people who are youth	<input type="checkbox"/>	<input type="checkbox"/>
Black people who are women	<input type="checkbox"/>	<input type="checkbox"/>
Black people with disabilities	<input type="checkbox"/>	<input type="checkbox"/>
Black people living in rural or underdeveloped areas or townships	<input type="checkbox"/>	<input type="checkbox"/>
Cooperative owned by black people	<input type="checkbox"/>	<input type="checkbox"/>

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
.....
.....