



REQUEST FOR BIDS

RFB NUMBER : SHRA/RFB/CAR/06/202021

CLOSING DATE : Friday 26th March 2021

TIME : 11h00

DESCRIPTION : Re-advertisement for the appointment of a service provider to perform administrative and associated services as defined by the SHRA for a social housing cooperative project in Johannesburg.

BRIEFING: Yes No

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

SECTION A

1. Background
2. RFB Submission Conditions and Instructions
3. Terms of Reference
4. Evaluation Process
5. Evaluation Criteria

SECTION B

1. Special Conditions of Bid and Contract
2. General Conditions of Contract (Annexure A)
3. Invitation to Quote (SBD 1)
4. Pricing Schedule (SBD 3.3)
5. Declaration of Interest (SBD 4)
6. Preference Points Claim form in terms of Preferential Procurement Regulations 2017 (SBD 6.1)
7. Declaration of bidder's Past SCM Practices (SDB 8)
8. Certificate of Independent Bid Determination (SBD 9)
9. Submission Checklist
10. Map to SHRA offices (Annexure B)

SECTION A

1. BACKGROUND

The Social Housing Regulatory Authority ("SHRA") was established in August 2010 by the Minister of Human Settlements in terms of the Social Housing Act, No. 16 of 2008. The SHRA is classified as a public entity in terms of Schedule 3A of the Public Finance Management Act.

1.1 MISSION

The SHRA will regulate and invest to deliver affordable rental homes and renew communities.

1.2 VISION:

Affordable rental homes in integrated urban environments through sustainable institutions.

1.3 FUNCTIONS

- Promote the development and awareness of social housing by providing an enabling environment for the growth and development of the social housing sector.
- Provide advice and support to the Department of Human Settlements in its development of policy for the social housing sector and facilitate national social housing programmes
- Provide best practice information and research on the status of the social housing sector
- Support provincial governments with the approval of project applications by social housing institutions
- Provide assistance, when requested, with the process of the designation of restructuring zones
- Enter into agreements with provincial governments and the National Housing Finance Corporation to ensure the co-ordinated exercise of powers

2. RFB SUBMISSION CONDITIONS AND INSTRUCTIONS

2.1 FRAUD AND CORRUPTION

2.1.1 All Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

2.2 COMPULSORY BRIEFING SESSION

2.2.1 **There will be a compulsory briefing session** for this Request for Bids on **12th March 2021 at 11h00.**

2.2.2 **Service providers are to register on the following link by Thursday, 11th March 2021 00h00 (midnight) for an invite:**
<https://www.surveymonkey.com/r/RGHXY6N>

The company name must be the Trading name and be exactly the same as the one to be provided on the Bid submission register.

2.3 CLARIFICATIONS/QUERIES

2.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Lesego Shabangu** at scm@shra.org.za by **Friday 19th March 2021 at 12h00.** The bid **number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.** If appropriate, the clarifying information will be made available to all bidders by e-mail only.

2.4 SUBMITTING BIDS

2.4.1 An **original plus three (3) copies** of the bid, i.e., four (4) documents in total should be handed in/delivered to:

Ms. Lesego Shabangu
Supply Chain Management
SHRA
Sunnyside Office Park
Sentinel House
3rd Floor
32 Princess of Wales Terrace
Parktown

Faxed or e-mailed bids will not be accepted

Bids should be submitted in a sealed envelope, marked with:

- RFB number: SHRA/RFB/CAR/06/202021
- Closing date and time: Friday 26th March 2021 at 11h00
- The name and address of the bidder

Documents submitted on time by bidders shall not be returned.

2.5 LATE BIDS

2.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bids received late shall be returned unopened to the bidder. Bidders are therefore strongly advised to ensure that bids be despatched allowing enough time for any unforeseen events that may delay the delivery of the bid.

2.5.2 The official Telkom time (dial 1026) will be used to verify the exact closing time (11h00).

2.5.3 Bids sent to SHRA via normal post or any other mechanism shall be deemed to be received at the date and time of arrival at the SHRA premises (tender/bid box or reception). Bids received at the physical address after the closing date and time of the bid, shall therefore be deemed to be received late.

2.6 DIRECTIONS TO SHRA OFFICE FOR DELIVERY OF BIDS

2.6.1 Directions to SHRA offices are attached as **Annexure B** to this document.

2.6.2 **Bidders should allow time to access the premises due to security arrangements that need to be observed.**

2.7 FORMAT OF BIDS

2.7.1 Bidders must complete all the necessary bid documents and undertakings required in this bid document. Bidders are advised that their bid should be concise, written in plain English and simply presented.

2.7.2 Bidders are to set out their bid in the following format:

Part 1: Invitation to Bid

Bidders must complete and submit the Invitation to Bid document.

Part 2: Pricing Schedule

Bidders must complete and submit the pricing schedule document.

The appointed Service Provider will:

- Claim travel costs applicable to this contract as per the AA rates
- Book only economy class flight and preferably Group A hire cars, otherwise Group B are to be used for Service Providers outside of Gauteng.
- Book only hotels, or other equivalent accommodation up to a Rand value of R1 400 per night per person (including dinner, breakfast and parking).

The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable

Part 3: Declaration of Interest

Each party to the bid must complete and submit the Declaration of Interest.

Part 4: Preference Points Claim Form in terms of the Preferential Procurement Regulations 2017

Bidders must complete and submit the Preference Points Claim Form.

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 OR a Letter from a registered Accounting Officer/ Auditor OR a sworn affidavit in terms of the Amended B-BBEE Codes from Exempted Micro Enterprises (EMEs) of R10 000 000 annual turnover.
- will qualify for points for their B-BBEE status level as an unincorporated entity, provided that 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.

Part 5: Declaration of bidders past supply chain management practices

Each party to the bid must complete and submit the Declaration of past supply chain management practices

Part 6: Certificate of Independent Bid Determination

Bidders must complete and submit the "Certificate of Independent Bid Determination" document.

Part 7: Broad Based Black Economic Empowerment Certificate

Bidders are to submit an Original/Certified copy of a valid BBEE Certificate.

- A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that 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. or a letter from an Accounting Officer/ Auditor or a sworn affidavit in terms of the

Amended B-BBEE Codes from Exempted Micro Enterprises (EMEs) of R10 000 000 annual turnover.

Part 8: General Conditions of Contract

Bidders must initial each page of the General Conditions of Contract and submit with their bid document.

Part 9: Technical approach

Bidder must at least:

Describe, in detail, exactly how they propose to carry out the activities to achieve the outcomes identified in the terms of reference. Bidders are required to have the basic office equipment and the resource/s (which must include, laptop, 3G connection, landline, own office with the basic office equipment) will be located within the region where the work will be done. They should identify any possible problems that might hinder delivery and indicate how they will avoid, or overcome such problems.

Describe how the work will be managed. Provide an organisation chart clearly indicating:

- The lines of reporting and supervision within the bidder’s team.
- The lines of reporting between the bidder and SHRA.

Identify the position(s) involved in the direct delivery of the service to be provided and in the overall management of the work and name the people who will fill these positions.

Describe the tasks, duties or functions to be performed by staff in these positions.

Indicate the number of hours required to complete each task and the number of hours to be provided by each team member. The bidder must be able to work within strict time lines and have the capacity to do so.

Provide information on any additional value-added services for consideration by SHRA, and which will form part of the overall proposed solution. Please note that the additional value ads must be priced separately in the space provided for in the pricing schedule.

Bidders are to present such information in a matrix. The following is provided merely as guidance. Bidders are free to elaborate as they see fit.

Outcome/output	Activity	Team member(s) involved (name and position)	Person days for each team member	Total person days

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Provide a work plan of activities. In addition to providing details of the estimated number of workdays for each activity, bidders are to supply a detailed timetable that identifies when certain activities will be undertaken and over what period they will be spread. The timing of activities, the time needed to complete them, and the order in which they will be undertaken must be explained and justified.

Please note that part 9 should be no longer than 10 single-sided A4 pages in Arial 11 (font size).

Part 10: Team Details

The bidder must provide:

- A comprehensive curricula vita (relevant to this bid and limited to two pages). In particular, the CV must highlight the team member(s) experience and qualifications to carry out the work

Part 11: Experience in this field

It is essential the service provider displays:

- Experience as set out in the terms of reference
- The Bidder must provide at least three (3) reference letters on company letterheads of previous clients where the Bidder provided similar services.

Part 12: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration

2.8 PRESENTATIONS

2.8.1 SHRA reserves the right to invite Bidders for presentations before the award of this Bid. Only Bidders who have met the minimum functionality criteria will be invited to presentation.

2.9 NEGOTIATION

2.9.1 SHRA has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

2.9.2 SHRA shall not be obliged to accept the lowest of any quotation, offer or bid.

2.9.3 SHRA issues this bid invitation in good faith; however, it reserves the right to:

- Cancel or delay the selection process at any time, without explanation,
- Not to select any of the respondents to this bid invitation, without explanation,
- Exclude certain services, without explanation.

2.9.4 All bidders will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties. The designated responsible person of SHRA is the Chief Executive Officer or his/her written authorised delegate.

2.10 REASONS FOR REJECTION

2.10.1 SHRA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.

2.10.2 SHRA may disregard the bid of any bidder if that bidder, or any of its directors:

2.10.2.1 have abused the Supply Chain Management systems of SHRA.

2.10.2.2 have committed proven fraud or any other improper conduct in relation to such systems.

2.10.2.3 have failed to perform on any previous contract and the proof exists.

2.10.3 Such actions shall be communicated to the National Treasury.

3. TERMS OF REFERENCE

3.1. SHRA'S MANDATE

The core mandate of the SHRA is to invest into, enable and regulate the social housing sector. The social housing sector operates within a legislative and policy framework

3.2. PURPOSE

Is to appoint a service provider to perform administrative and associated services as defined by the SHRA for a social housing co-operative project in Johannesburg.

3.3. BACKGROUND

3.1.1. The Social Housing Regulatory Authority (SHRA) has been established in terms of section 7 of the Social Housing Act, 2008 (Act No. 16 of 2008). Its functions include inter alia investing, regulating and capacitating the Social Housing Sector.

3.1.2. There is a social housing co-operative project in Johannesburg which is being supported by SHRA towards sustainability as a co-operative. SHRA wants to achieve an institution that becomes accredited and that can successfully run the project consisting of 121 units and therefore be sustainable as a co-operative.

3.1.3. Currently the project is functioning through an interim body corporate made up of the residents. However, the interim body corporate does not have all the requisite property, financial and tenant management expertise.

3.1.4. To this effect SHRA seeks to appoint a suitably qualified Property and Tenant Management Specialist service provider to manage and administer the affairs of the social housing co-operative.

3.4. DETAILS OF THE SOCIAL HOUSING CO – OPERATIVE

3.2.1. This project is currently under administration due to maladministration and that the SHRA is the administrator appointed by the court in line with the Social Housing Act.

3.2.2. Work has already been performed to stabilise the project since 2016 i.e. rent collection and servicing of some of the debts.

3.2.3. The project is currently servicing a loan with a financier who funded the development.

3.2.4. There is a current arrangement with the City of Johannesburg to service the current arrears.

3.2.5. The project has 120 units and all are tenanted.

3.2.6. There is no administrative office or facilities at the Project site.

3.2.7. There are currently three (3) in-house cleaning staff members.

3.2.8. Furthermore, the project has a contract with one (1) Security Company through which two (2) security personnel are allocated to the project.

3.5. OBJECTIVE

To appoint a suitably qualified Property and Tenant Management service provider with a Financial Management background and experience to administer the affairs of the social housing co-operative.

3.6. SCOPE OF WORK

The successful service provider will be responsible for the scope of work as detailed below:

3.61. To prepare and consolidate the annual financial statements into 2018/2019 and 2019/20.

3.62. To coordinate and oversee the annual audit process of the financial statements.

3.63. To administer the social housing co-operative bank accounts for the duration of appointment period. The administrator will participate and co-operate with the body corporate.

3.64. The accreditation application packaging has been finalised and the service provider is required to complete the accreditation pack and submit to the Regulator;

3.65. The responsibilities will encompass specific focus on the following elements of tenant and property management services particularly those relating, but not limited to:

a. Client services

- i. Rental administration (Contracting with tenants, member contribution/rent collection, Managing arrears & vacancies);
- ii. Client relationship management (Tenant participation & Conflict resolutions);
- iii. To supply and install a property management program /software and bill tenants accordingly; and ensure that it runs and there is training and transfer of skills to enable them to produce the information expected on month to month basis
- iv. Monitor the performance of cleaning and security services;
- v. Arrange and facilitate the Annual General Meetings (AGMs) for tenants;
- vi. Ensure servicing of fire equipment;
- vii. Address residents' complaints through a structured process;
- viii. Update the long-term maintenance plan;
- ix. Plan (and consult the tenants) on the proposed annual increase of member contributions/levies.

b. Housing stock management and maintenance

- i. Housekeeping (Upkeep & cleaning);
- ii. Develop a Long-Term Maintenance Plan (3-5yrs);
- iii. Update annual maintenance plans;
- iv. Follow up and negotiate with the City of Johannesburg the correction of the billing system and reversal of incorrect billing which leads to the change in rates (from commercial to residential);

- v. Maintenance of external envelop in the building;
 - vi. Ensure that the property is insured (Building, public & third-party liability cover)
 - vii. Manage the contract with the security company and the cleaning staff on site;
 - viii. Management of vacancies and ensuring recruitment of new members when there is a vacancy (ies);
- c. Financial management
- i. Ensure monthly billing and statements;
 - ii. Appointment of the external auditors to audit the annual financial statements (AFS);
 - iii. Servicing and managing creditors accounts;
 - iv. Create a separate bank account for maintenance reserves;
 - v. To administer the social housing co-operative bank accounts;
 - vi. Produce/ present audited financial statement/report;
 - vii. Monthly management accounting and monthly financial reports;
- d. Risk Management
- i. Risk assessment to identify risks and proposed mitigation strategies/ corrective actions.
- e. Legal and compliance
- i. Contracts management (user agreements, constitution, etc.); Facilitate legal review in so far as registration with CIPC is concerned, and annual renewal thereof, immediately after the certification of annual audited financial statement;
 - ii. Legal review of the current type of registration of the entity with CIPC in view of the need to change it to non-profit company;
 - iii. Ensure annual tax compliance processes are addressed;
 - iv. Legal review of user- agreement and statutes and those lease agreements that are in place;
 - v. Regularise tenants to align with the subsidy requirements (Qualifying criteria); (identify legal and illegal foreigners) reference to rental tribunal to ensure that tenants that meets social housing specification are inside those units;
 - vi. Assist the body corporate to negotiate with the City of Johannesburg and its entities on the applicable tariff rates for both water and electricity;
 - vii. Facilitate the migration of electricity metering/supply from Citiq (the current privates service provider) to City of Johannesburg;
 - viii. Review of the service providers' contract(s) (Security contract);
 - ix. Conduct compliance checks with the primary legislations for e.g. Rental Housing Act, Co-operative Act, Social Housing Act and other statutes;
 - x. Regulatory compliance reporting.

3.7. PROJECT DELIVERABLES

Scope	Deliverables
1. Introduction of Levy Increase and Budget	<ul style="list-style-type: none"> • Proof of Notice of levy increase coordinated with the body corporate and SHRA
2. Financials Management	<ul style="list-style-type: none"> • Prepared monthly submission of filed and management accounts - Monthly Financial Report to the body corporate and SHRA • Filed and labelled record of Source Documents
	<ul style="list-style-type: none"> • Monthly levy Collection & Credit Control - Revenue Statement and Credit Control Report • Service of City of Johannesburg Current Account - Updated Statements • Servicing of City of Johannesburg Arrears Account – Updated Statements • Servicing of NHFC debt – Updated Statements • Preparation Presentation of Operational Budget to Project stakeholders for Approval - Approved Operational Budget • Completed Audited Financial Statements for year 2018/19 and 2019/20
3. Staff	<ul style="list-style-type: none"> • Human Resource Management and Contracts
4. Estate Management	<ul style="list-style-type: none"> • Monthly reports provided on maintenance. • Tenant Management - Monthly Report - Tenancy Management • Property Management - Monthly Report - Property Management (Security, Incidents management report) • Resolutions taken on the AGM • Project risks identified and mitigation strategies proposed
5. Systems, Policies and Procedures	<ul style="list-style-type: none"> • Accreditation - SHRA Accreditation Application Receipt Acknowledgment letter, Verification Report. • Training of the interim board of directors - Company Policies, Procedures, Management System (Implementation of the current policies and procedures) • Management Systems and Procedures in place, body corporate trained on the usage of the system • SHRA Accreditation Assessment Report • Operational Policies in place.
6. Reporting	<ul style="list-style-type: none"> • Monthly information pack to client. • Quarterly Reporting tool

3.8. PROGRESS REPORTING

3.8.1 The service provider must report on a monthly basis to the SHRA and the Board of Directors, and is expected to work with and report to the following project stakeholders:

3.8.1.1 The service provider will report administratively to the Compliance Officer and be accountable to the Compliance Manager of the SHRA;

3.8.1.2 The service provider will provide regular reports to The Task Team (Board)

3.9. KNOWLEDGE AND EXPERIENCE

The bidder must demonstrate at least a minimum of five (5) years' experience in the following areas:

Property Management - which includes property maintenance, security and cleaning services;

3.9.1 Finance Management- which includes payment of creditors, creating and maintaining management and financial accounts, rental collections, evictions, preparing individual tenants accounts, management of debtors and enforce credit control and enforce vacancy management in line with the existing policies.

3.10. QUALIFICATIONS AND EXPERIENCE

- The team leader to display relevant Bachelor's degree qualification in Property Management coupled with a minimum of 5 years' experience in Property and/or Tenant Management.
- Team members to display relevant Bachelor's degree qualification in Financial Management, coupled with a minimum of 5 years' experience in credit control and/or tenant management and/or Property and/or financial management implementation.

3.11. DURATION OF THE CONTRACT

The service provider will be appointed for a period of twelve (12) months pending SHRA's needs and discretion from start date.

3.12. ACCOUNTABILITY AND REPORTING

The appointed service provider will report to the Compliance & Monitoring Manager and be accountable to the Executive: Compliance, Accreditation and Regulations of the SHRA for the duration of the contract.

3.13. FORMAT OF THE PROPOSAL

In addition to completion of the forms, the bidder should provide a written proposal consisting of the following sections:

- a. Understanding of the scope of work
- b. A company profile which includes past and current portfolio of properties managed
- c. CVs of the Team Members proposed for this assignment
- d. Property and Tenant Management systems utilised

4. EVALUATION PROCESS

4.1 COMPLIANCE WITH MINIMUM REQUIREMENTS

4.1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions. Bids with obvious deviations from the requirements/conditions, will be eliminated from further adjudication.

4.2 PRE-QUALIFICATION CRITERIA FOR PREFERENTIAL PROCUREMENT

4.2.1 As per the preferential Procurement Regulations (PPR) 2017, the SHRA is applying Pre-Qualification Criteria this bid in an effort to advance certain designated groups.

4.3 FUNCTIONALITY, PRICE AND PREFERENCE POINTS

4.3.1 All remaining bids will be evaluated as follows:

4.3.2 The functionality calculation will be done based on the defined criteria and weighting thereof. Functionality will be scored out of a 100. If it is deemed necessary, presentations may be held with Bidders who have met the minimum functionality criteria. If presentations are held, the functionality score will be adjusted whereby 80 percent will be awarded to during the bid evaluation and 20 percent will be for presentation score. **If a bidder fails to score a minimum of 70% out of 100% for functionality, the bid will be disregarded from further consideration.**

4.3.3 The second part will then be done on the 80/20 split whereby (80) points will be awarded for price and 20 points will be awarded for B-BBEE Status Level Contribution.

4.4 ELIMINATION OF BIDS ON GROUNDS OF FUNCTIONALITY

4.4.1 Bids that score less than 70% of the 100% available for functionality will be eliminated from further consideration. Points will therefore not be awarded for their cost bids or for B-BBEE Status Level of Contribution

4.4.2 The percentage scored for functionality should be calculated as follows:

4.4.3 Each panel member shall award values for each individual criterion on a score sheet. The value scored for each criterion shall be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for the various criteria. These marks should be added to obtain the total score. The following formula should then be used to convert the total score to a percentage for functionality:

$$Ps = \frac{So}{Ms} X Ap$$

where

Ps = percentage scored for functionality by bid/bid under consideration

So = total score of bid/bid under consideration

Ms = maximum possible score

Ap = percentage allocated for functionality

The percentages of each panel member shall be added together and divided by the number of panel members to establish the average percentage obtained by each individual bidder for functionality.

After calculation of the percentage for functionality, the prices of all bids that obtained the minimum score for functionality should be taken into consideration.

4.5 PRESENTATIONS

4.5.1 SHRA may decide to have compulsory presentations made by Bidders who met the minimum functionality criteria once the functionality score has been calculated.

4.5.2 Presentations shall only affect the marks awarded for functionality. If SHRA wishes to use presentations as an additional selection criterion between bidders, the evaluation criteria to be affected shall be determined in advance and due allowance made in the mark scheme.

4.5.3 If the date of the presentation meeting is not indicated in the bid document, at least three days' notice will be given to bidders required to attend a presentation.

4.5.4 Presentations will be made to the full Evaluation Committee.

4.5.5 Points determined by the presentation will be awarded to each bidder by each member of the Evaluation Committee and then an average calculated.

4.6 AWARDING OF PREFERENCES POINTS

4.6.1 Points for B-BBEE Status Level of Contribution will be awarded according to the table indicated in the preference points claim form(s).

4.7 COMBINING PRICE AND PREFERENCE POINTS

4.7.1 The B-BBEE Status Level of Contribution marks for each bid will now be added to the price points for that bid

4.7.2 The Evaluation Committee may recommend that the contract be awarded to the bidder obtaining the highest aggregate mark as determined by 4.5.1 or to a lower scoring bid based on firm, verifiable and justifiable grounds.

4.8 ADJUDICATION OF BID

- 4.8.1 The Adjudication Committee will consider the recommendations and make the final award. The successful bidder will usually be the service provider scoring the highest number of points or it may be a lower scoring bid based on firm, verifiable and justifiable grounds or no award at all.

5. EVALUATION CRITERIA

Functionality Evaluation

All proposals will be evaluated on the criteria provided in the table below. The proposals of all training providers will be rated on a scale of 1 to 5.

- 1: Unacceptable, does not meet set criteria
- 2: Weak, less than acceptable. Insufficient for performance requirements
- 3: Satisfactory should be adequate for stated element
- 4: Very good, above average compliance to the requirement
- 5: Exceptional mastery of the requirement should ensure extremely effective performance.

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
Proposed Technical approach and methodology of the bidder:	Rating out of 5	Evaluation criteria	20%	
Bidders understanding of the scope of work (10 points) ;	1	Scope of work is referred to but is inaccurate		
	2	Copy and paste of the terms of reference		
	3	Reference to the full scope of work, with minor changes on the original scope		
	4	Reference to the full scope of work but written in own words		
	5	Reference to the full scope of work, written in own words and provision of examples of similar type of projects the service provider has undertaken		
Proposed Methodology and Project Work Plan shows how proposed actions will deliver a turnaround in the administration of this institution and how the overall project will be executed and how deliverables will be managed (10 points) ;	1	Short Methodology that does not relate to the full scope of work		
	2	Methodology that includes the full scope of work, with own timeframes and deliverables		
	3	Methodology that includes the full scope of work, required timeframes and deliverables		
	4	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project plan which indicates activities and timeframes that		

		adhere to the terms of reference.		
	5	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project plan which indicates activities and timeframes that adhere to the terms of reference. Project plan also includes a matrix which shows how the activities will result in a turnaround in each specific aspect that must be redesigned in an institution and includes commitment to do skills transfer.		
Suitability of the proposed team:	Rating out of 5	Evaluation criteria		
The team leader has a minimum of 5 years' experience in Property management (40 points);	1	1-2 years' experience in performing property management (no qualifications included)	40%	
	2	3-4 years' experience in performing property management (with relevant qualifications included)		
	3	5 years' experience in performing property management (with relevant qualifications included)		
	4	6 -7 years' experience in performing property management (with relevant qualifications included)		
	5	Over 8+ years' experience in performing property management (with relevant qualifications included)		
The team members have a minimum of 5 years' experience in implementing financial management (30 points);	1	Team member do not have the required experience (no qualifications included)	30%	
	2	Team member have less than five years' experience (with relevant qualifications included)		
	3	Team member have the required experience (with relevant qualifications included)		
	4	Team member have more than five years' experience (with relevant qualifications included)		
	5	Team member have more than eight years' experience (with relevant qualifications included)		
The bidder has provided at least 3 letters of reference which proof that the bidder has successfully undertaken Similar work/assignment (10 points)	1	No letters Included in the submission	10%	
	2	1-2 letters included in the submission		
	3	3 letters included in the submission		
	4	4-5 letters included in the submission		
	5	6 letters or more included in the submission		
TOTAL POINTS			100%	

SECTION B

1. SPECIAL CONDITIONS OF CONTRACT

1.1. GENERAL

1.1.1. Proper bids for the services specified must be submitted.

1.2. ADDITIONAL INFORMATION REQUIREMENTS

1.2.1. During evaluation of the bids, additional information may be requested in writing from Bidders. Replies to such request must be submitted in writing, within five (5) working days or as otherwise indicated. Failure to comply may lead to your bid being disregarded.

1.3. CONFIDENTIALITY

1.3.1. The bid and all information in connection therewith shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid. Bidders shall undertake to limit the number of copies of this document.

1.3.2. All bidders are bound by a confidentiality agreement preventing the unauthorised disclosure of any information regarding the SHRA or of its activities to any other organisation or individual. The bidders may not disclose any information, documentation or products to other clients without written approval of the accounting authority or the delegate.

1.4. INTELLECTUAL PROPERTY, INVENTIONS AND COPYRIGHT

1.4.1. Copyright of all documentation relating to this contract belongs to the SHRA. The successful bidder may not disclose any information, documentation or products to other clients without the written approval of the accounting authority or the delegate.

1.4.2. All the intellectual property (IP) rights arising from the execution of this Agreement shall vest in SHRA and the Service provider undertakes to honour such intellectual property rights and all future rights by keeping the know-how and all published and unpublished material confidential.

1.4.3. In the event that the service provider would like to use information or data generated by the service, the prior written permission must be obtained from SHRA.

1.4.4. SHRA shall own all materials produced by the Service provider during the course of this contract, or as part of the service including without limitation, deliverables, computer programmes (source code and object code), programming aids and tools, documentation, reports, data, designs, concepts and other information whether capable of being copyrighted or not ("IP").

- 1.4.5. The Service provider assigns all IP rights in respect of all materials referred to in clause 1.4.4 to SHRA. No other document needs to be executed to give effect to this cession, assignment or transfer.
- 1.4.6. The Service provider hereby irrevocably cedes, assigns and transfers to SHRA, as SHRA directs, all rights, title and interest in and to all IP (which includes, but is not limited to methodologies and products) connected with or applicable to the Services.
- 1.4.7. The Service provider acknowledges and agrees that:
- 1.4.7.1. Each provision of clause 1.3 is separate, severally and separately enforceable from any other provisions of this agreement.
- 1.4.7.2. The invalidity or non-enforceability of any one or more provision hereof, shall not prejudice or effect the enforceability and validity of the remaining provisions of this agreement; and
- 1.4.7.3. This clause 1.3 shall survive termination of this agreement.

1.5. NON-COMPLIANCE WITH DELIVERY TERMS

- 1.5.1. As soon as it becomes known to the Service provider that he will not be able to deliver the goods/services within the delivery period and/or against the bid price and/or as specified, the SHRA must be given immediate written notice to this effect. The SHRA serves the right to implement remedies as provided for in the GCC.

1.6. WARRANTIES

- 1.6.1 The Service provider warrants that it is able to conclude this Agreement to the satisfaction of the SHRA.
- 1.6.2 Although the Service provider will be entitled to provide services to persons other than SHRA, the Service provider shall not without the prior written consent of SHRA, be involved in any manner whatsoever, directly or indirectly, in any business or venture which competes or conflicts with the obligations of the Service provider to provide the Services.

1.7. PARTIES NOT AFFECTED BY WAIVER OR BREACHES

- 1.7.1 The waiver (whether express or implied) by any Party of any breach of the terms or conditions of this contract by the other Party shall not prejudice any remedy of the waiving party in respect of any continuing or other breach of the terms and conditions hereof.
- 1.7.2 No favour, delay, relaxation or indulgence on the part of any Party in exercising any power or right conferred on such Party in terms of this contract shall operate as a waiver of such power or right nor shall any single or partial exercise of any such power or right under this agreement.

1.8.RETENTION

1.8.1 On termination of this agreement, the Service provider shall on demand hand over all documentation, information, software, etc., relating to the provision of services as per this bid without the right of retention, to the SHRA.

1.8.2 No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force and effect unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing, shall

2. GENERAL CONDITIONS OF CONTRACT

2.1 The General Conditions of Contract must be accepted. The general conditions applicable to government entity bids, contracts and order are attached herein as **Annexure A** as they will apply to this bidding process.

2.2 Bidders are required to initial each page of the General Conditions of Contract as an indication of acceptance.

INVITATION TO SUBMIT BIDS

YOU ARE HEREBY INVITED TO PROPOSE FOR REQUIREMENTS OF THE SHRA

RFB NUMBER: SHRA/RFB/CAR/06/202021 **DATE:** 26th March 2021 **CLOSING TIME:** 11h00

DESCRIPTION: Re-advertisement for the appointment of a service provider to perform administrative and associated services as defined by the SHRA for a social housing cooperative project in Johannesburg.

VALIDITY PERIOD: Offer to be valid for 90 days from the closing date of the bid

The successful bidder will be required to fill in and sign a written Contract Form.

**BID DOCUMENT MUST BE DEPOSITED IN THE BID BOX SITUATED AT
(STREET ADDRESS)**

Ms Lesego Shabangu
Supply Chain Management
SHRA
Sunnyside Office Park
Sentinel House
3rd Floor
32 Princess of Wales Terrace
Parktown

Faxed or e-mailed bids will not be accepted.

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

Bids can be delivered between 08h30 and 16h30, Mondays to Friday, prior to the closing date and between 08h30 and 11h00 on the closing date.

All bids must be submitted on the official forms (not to be re-typed).

This RFB is subject to the following:

- General Conditions of Contract (GCC) and, if applicable, any other Special Conditions of Contract.
- the Preferential Procurement Policy Framework Act, 2000
- the Preferential Policy Regulations, 2017
- Bids submitted that do not comply with the following will be disqualified**
 - A late Bid (a bid arriving one second after 11h00 or any time thereafter)

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	SHRA/RFB/CAR/06/202021	CLOSING DATE:	26 th March 2021	CLOSING TIME:	11h00
DESCRIPTION	Re-advertisement for the appointment of a service provider to perform administrative and associated services as defined by the SHRA for a social housing cooperative project in Johannesburg.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
SHRA, Sunnyside Office Park, Sentinel House, 3rd Floor, 32 Princess of Wales Terrace, Parktown					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms Lesego Shabangu		CONTACT PERSON	Ms Lesego Shabangu	
TELEPHONE NUMBER			TELEPHONE NUMBER		
E-MAIL ADDRESS	Scm@shra.org.za		E-MAIL ADDRESS	Scm@shra.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
NAME OF REPRESENTATIVE					
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 PART B:3]	
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.					

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:	
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7	NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

TOTAL BID PRICE (ALL INCLUSIVE)

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.: SHRA/RFB/CAR/06/202021
CLOSING TIME 11:00	CLOSING DATE: 26 th March 2021

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

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

- The accompanying information must be used for the formulation of proposals.
- 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, (including VAT and all disbursements).
R.....

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-----	-----

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 air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

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

TOTAL:

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

5.2 Other expenses, for example accommodation (specify, e.g. 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.

.....

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a bid or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorized representatives declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/ a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

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

2.1 Full Name of bidder or his or her representatives:

2.2 Identity Number:

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

2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 The names of all directors/trustees/shareholders/members, their individually Identity numbers, tax reference numbers and, if applicable, employee/PERSAL number must be indicated in paragraph 3 below.

1"state means-

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

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

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

2.7.1 If so, furnish the following particulars:

Name of person /director /trustees /shareholder /member:

Name of state institution at which you or the person connected to the bidder is employed:

Position occupied in the state institution:

Any other particulars:

.....

.....

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

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

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

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

.....

.....

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

2.8.1 If so, furnish particulars:

.....

.....

.....

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

2.9.1 If so, furnish particulars:

.....

.....

.....

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? YES/NO

2.10.1 If so, furnish particulars:

.....

.....

.....
2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

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

3 Full details of directors /trustees / members /shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number/ Pearsal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....
CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPH 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVES 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 RFB is estimated **not to exceed R50 000 000.00** (all applicable taxes included) and hence it is issued as a closed Request. **Therefore, the 80/20 reference point system shall be applicable.**

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	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
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.

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

- (c) “**bid**” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) “**Broad-Based Black Economic Empowerment Act**” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) “**EME**” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) “**functionality**” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) “**prices**” includes all applicable taxes less all unconditional discounts;
- (h) “**proof of B-BBEE status level of contributor**” means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) “**QSE**” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

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

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

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

(Tick applicable box)

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

7.1.1 If yes, indicate:

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

(Tick applicable box)

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

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

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

8. OUTCOMES AGAINST PREFERENTIAL PROCUREMENT CRITERIA

B-BBEE status level of contributor	
Percentage owned by black people	
Percentage owned by black people who are youth	
Percentage owned by black people who are women	
Percentage owned by black people with disabilities	
Percentage owned by black people who are military veteran	
Percentage owned by black people living in rural or underdeveloped areas	
Percentage owned by black people living in townships	

9. DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm:.....

9.2 VAT registration number:.....

9.3 Company registration number:.....

9.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One person business/sole propriety
- Close corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

.....

.....

9.6 COMPANY CLASSIFICATION

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

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

9.8 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.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>
--

<p>.....</p> <p>SIGNATURE(S) OF BIDDERS(S)</p>
<p>DATE:</p> <p>ADDRESS</p> <p>.....</p> <p>.....</p>

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

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

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

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

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

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

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

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

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

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

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

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

I certify, on behalf of: _____

that:

(Name of Bidder)

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

6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

10. BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:

NO.	DETAILS	TICK BY BIDDER
1.	Part 1: Completed and signed the invitation to bid document (SBD 1)	
2.	Part 2: Completed the pricing schedule (SBD 3.3)	
3.	Part 3: Completed and signed the declaration of interest document (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid <u>must</u> complete and sign the declaration of interest document)</i>	
4.	Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2017 (SBD 6.1)	
5.	Part 5: Completed and signed the Declaration of bidders past Supply Chain Management Practices document (SBD 8). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid <u>must</u> complete and sign the Declaration of bidders past Supply Chain Management Practices document)</i>	
6.	Part 6: Completed and signed the Certificate of Independent Bid Determination (SBD 9)	
7.	Part 7: Submitted an original/ certified copy of a valid BBBEE Certificate. <i>(In case of a trust, consortium or joint venture, bidders will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity <u>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.</u></i>	
8.	Part 8: Submitted the General Conditions of Contract (initialled each page)	
9.	Part 9: Submitted the Technical approach	
10.	Part 10: Submitted the Details of the team and included their CV	
11.	Part 11: Submitted Experience in the field document and 3 reference letters	
12.	Part 12: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration	