



public works  
& infrastructure

Department:  
Public Works and Infrastructure  
REPUBLIC OF SOUTH AFRICA

Private Bag X65, PRETORIA 0001, and Int Code: +27 12 Tel: 012 406 1812 Fax: 086 272 8850  
E-mail: Portia.moipoLai@dpw.gov.za website: [www.publicworks.gov.za](http://www.publicworks.gov.za)

**Dear Sir/ Madam**

**You are hereby invited to submit a quotation for the supply and delivery of the following goods/assets/service to the Department of Public Works.**

**QUOTATION NO : RFQ118A4583**

**QUOTATION DESCRIPTION : APPOINTMENT OF A SERVICE PROVIDER FOR THE COMPILATION, ANALYSIS OF OPERATIONAL PLANS AND PERFORMANCE INDICATOR MAPPING FROM OPERATIONAL PLAN TO THE ANNUAL PERFORMANCE PLAN**

**VALIDITY PERIOD : 30**  
**CLOSING TIME : 12:00**  
**CLOSING DATE : 28-10-2021**

DESCRIPTION	UNIT OF PURCHASE	QUANTITY REQUIRED	UNIT COST ( INCL VAT)	TOTAL AMOUNT ( INCL VAT )
APPOINTMENT OF A SERVICE PROVIDER FOR THE COMPILATION, ANALYSIS OF OPERATIONAL PLANS AND PERFORMANCE INDICATOR MAPPING FROM OPERATIONAL PLAN TO THE ANNUAL PERFORMANCE PLAN  <i>PLEASE REFER TO THE ATTACHED SPECIFICATION</i>				

**Please e-mail the completed quotation to**

**: Public Works  
: Corner Church and Bosman Street**

Enquiries : Portia Moipolai  
Tel : 012 406 1812  
E-mail : [portia.moipolai@dpw.gov.za](mailto:portia.moipolai@dpw.gov.za)  
Technical enquiries Karabo Sebati 012 406 1351

**Quotations must be submitted to the following email address:  
ndpwquotations@dpw.gov.za or quotations box**

***NOTE:*** Suppliers are to ensure that their banking details are successfully verified on CSD, The department may at any point request verification of the details.

**Please stamp the RFQ with your Company Stamp. However a quotation on the company letterhead would be accepted. Failure to return the forwarded PA-Forms will result in your quotation being considered as non-responsive.**

## PA-03 (GS): NOTICE AND INVITATION FOR QUOTATION

THE DEPARTMENT OF PUBLIC WORKS INVITES BIDDERS FOR THE PROVISION OF:

<b>Project description:</b>	<b>APPOINTMENT OF A SERVICE PROVIDER FOR THE COMPILATION, ANALYSIS OF OPERATIONAL PLANS AND PERFORMANCE INDICATOR MAPPING FROM OPERATIONAL PLAN TO THE ANNUAL PERFORMANCE PLAN</b>
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<b>Quote no:</b>	RFQ4583	<b>Closing date:</b>	28-10-2021
<b>Closing time:</b>	11H00	<b>Validity period:</b>	30 days

**Bidders who do not comply to the below criteria may be disqualified**

<input checked="" type="checkbox"/>	Bid offer must be properly received on the bid closing date and time specified on the invitation, fully completed and signed in ink.
<input checked="" type="checkbox"/>	Submission of standard bidding documents (PA-11 ; PA-29; PA-32, PA 16)
<input checked="" type="checkbox"/>	PA-16 preference points claim form in terms of the preferential procurement regulations 2017
<input checked="" type="checkbox"/>	Compliance with Pre-qualification criteria for Preferential Procurement (It is compulsory to submit the certified BBEE Certificate or a sworn affidavit in order to be considered.)
<input checked="" type="checkbox"/>	Profile of the organisation detailing the areas of focus
<input checked="" type="checkbox"/>	Demonstrate experience of work done (related to the request) in the public sector

**Only bidders who complies with the following Pre-qualification criteria for Preferential Procurement will be considered:**

<input checked="" type="checkbox"/>	A tenderer having stipulated minimum B-BBEE status level of contributor; <input checked="" type="checkbox"/> Level 1 OR <input checked="" type="checkbox"/> Level 2
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**Points scoring system applicable for this bid:**

<input checked="" type="checkbox"/> 80/20 points scoring system
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**Price weighting applicable to this bid:**

	<b>Weighting percentage (must add up to 100 %)</b>
<b>Price:</b>	100% of 80 points
<b>Total:</b>	100%

### TAX INFORMATION

The taxes of the successful bidder must be in order at all times. Should the department find that the tax matters are not in order; 3 days may be given to the service provider to rectify the situation, or satisfactory

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arrangements must be made with the Receiver of Revenue to meet the bidder's tax obligations? Written confirmation is required. Bidders who fail to meet this requirement will lead to disqualification

**PART A  
PA-32: INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>					
BID NUMBER:	RFQ4583	CLOSING DATE:	28-10-2021	CLOSING TIME:	11:00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR THE COMPILATION, ANALYSIS OF OPERATIONAL PLANS AND PERFORMANCE INDICATOR MAPPING FROM OPERATIONAL PLAN TO THE ANNUAL PERFORMANCE PLAN				
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (DPW04.1 GS or DPW04.2 GS).</b>					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
<b>CNR MADIBA AND BOSMAN STREETS</b>					
<b>256 CENTRAL GOVERNMENT OFFICES</b>					
OR EMAILED TO:					
ndpwquotations@dpw.gov.za					
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE (TICK APPLICABLE BOX)	<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No			<input type="checkbox"/> No	
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
				NAME:	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs&amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					

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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 BELOW)
SIGNATURE OF BIDDER	.....	DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)			
TOTAL NUMBER OF ITEMS OFFERED		TOTAL BID PRICE (ALL APPLICABLE TAXES)	
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>		<b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>	
DEPARTMENT/ PUBLIC ENTITY	PUBLIC WORKS	CONTACT PERSON	
CONTACT PERSON	Portia Moipolai	TELEPHONE NUMBER	
TELEPHONE NUMBER	012 406 1812	FACSIMILE NUMBER	
FACSIMILE NUMBER	086 272 8850	E-MAIL ADDRESS	
E-MAIL ADDRESS	Portia.moipolai@dpw.gov.za		

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
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 ONLINE
1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.5. 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 LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
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 VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / 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.
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>
3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO

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- 3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?  YES  NO
- 3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  YES  NO
- 3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?  YES  NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

**NB:** FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID. AN ORIGINAL OR CERTIFIED COPY OF THE B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE.

**Note Well:**

- a) In respect of non VAT vendors the bidders may not increase the bid price under Section 67(1) of the Value Added Tax Act of 1991 where the relevant transaction would become subject to VAT by reason of the turnover threshold being exceeded and the bidder becomes liable for VAT.
- b) All delivery costs must be included in the bid price, for delivery at the prescribed destination.
- c) The price that appears on this form is the one that will be considered for acceptance as **a firm and final offer**.
- d) The grand total in the pricing schedule(s), inclusive of VAT, attached to the bid offer must correlate and be transferred to this form (PA32).
- e) Where there are inconsistencies between the grand total price offer in the pricing schedule(s) and the PA32 price offer, the price offer on the PA32 shall prevail and deemed to be firm and final. No further correspondence shall be entered into in this regard.

<sup>1</sup> All applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies

## PA-11: DECLARATION OF INTEREST AND BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

Failure to complete this form in full and signed by the duly authorized person shall render the tender non-responsive and will be removed from any and all further contention.

Project title:	APPOINTMENT OF A SERVICE PROVIDER FOR THE COMPILATION, ANALYSIS OF OPERATIONAL PLANS AND PERFORMANCE INDICATOR MAPPING FROM OPERATIONAL PLAN TO THE ANNUAL PERFORMANCE PLAN		
Bid no:		Reference no:	RFQ4583

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

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such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons 1

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

2.1 Full Name of bidder or his or her representative: .....

.....

2.2 Identity number: .....

2.3 Position occupied in the Company (director, trustees, shareholder<sup>2</sup> ect .....

.....

2.4 Company Registration Number: .....

2.5 Tax Reference Number:.....

2.6 VAT Registration Number: .....

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

<sup>1</sup> "State" means –

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

<sup>2</sup> "Shareholder" means –

- (a) a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercise 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 is connected to the bidder is employed

.....

Position occupied in the state institution:.....

Any other particulars:

.....  
 .....

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

2.8.1 If so, furnish particulars:.....

.....

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

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 the 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 Tax Reference Number	State Number	Employee Peral Number




**4. DECLARATION OF TENDERER / BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES**

4.1	Is the tenderer / bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector? <b>(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the audi alteram partem rule was applied).</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.2	If so, furnish particulars:		
4.3	Is the tenderer / 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)? <b>To access this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a>, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.4	If so, furnish particulars:		
4.5	Was the tenderer / bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.6	If so, furnish particulars:		
4.7	Was any contract between the tenderer / bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.8	If so, furnish particulars:		

**5. CERTIFICATION**

I the undersigned (full name) \_\_\_\_\_ certify that the information furnished on this declaration form is true and correct.

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I accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.

Name of Tenderer / bidder	Signature	Date	Position

This form has been aligned with SBD4 and SBD 8

## PA- 29: CERTIFICATION OF INDEPENDENT BID DETERMINATION

Project title:	APPOINTMENT OF A SERVICE PROVIDER FOR THE COMPILATION, ANALYSIS OF OPERATIONAL PLANS AND PERFORMANCE INDICATOR MAPPING FROM OPERATIONAL PLAN TO THE ANNUAL PERFORMANCE PLAN		
Bid no:		Reference no:	

### INTRODUCTION

1. This PA-29 [Certificate of Independent Bid Determination] must form part of all bids<sup>1</sup> 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).<sup>2</sup> 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 form (PA-29) 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 (PA-29) must be completed and submitted with the bid:

---

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> 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 consortium<sup>3</sup> 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.

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

<sup>3</sup> 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.

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.

Name of Bidder	Signature	Date	Position

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**Request for Quotation (Head Office only)**

**PA- 40: DECLARATION OF DESIGNATED GROUPS FOR PREFERENTIAL PROCUREMENT**

Name of Tenderer .....  EME<sup>1</sup>  QSE<sup>2</sup>  Non EME/QSE (tick applicable box)

**1. LIST ALL PROPRIETORS, MEMBERS OR SHAREHOLDERS BY NAME, IDENTITY NUMBER, CITIZENSHIP AND DESIGNATED GROUPS.**

Name and Surname #	Identity/ Passport number and Citizenship##	Percentage owned	Black	Indicate if youth	Indicate if woman	Indicate if person with disability	Indicate if living in rural / under developed area/township	Indicate if military veteran
1.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9.		%	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

# # Where Owners are themselves a Company, Close Corporation, Partnership etc, identify the ownership of the Holding Company, together with Registration number  
State date of South African citizenship obtained (not applicable to persons born in South Africa )

<sup>1</sup> EME: Exempted Micro Enterprise  
<sup>2</sup> QSE: Qualifying Small Business Enterprise

**Request for Quotation (Head Office only)**

**2. DECLARATION:**

**The undersigned, who warrants that he/she is duly authorized to do so on behalf of the Tenderer, hereby confirms that:**

- 1 The information and particulars contained in this Affidavit are true and correct in all respects;
- 2 The Broad-based Black Economic Empowerment Act, 2003 (Act 53 of 2003), Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), the Preferential Procurement Regulations, 2017, National Small Business Act 102 of 1996 as amended and all documents pertaining to this Tender were studied and understood and that the above form was completed according to the definitions and information contained in said documents;
- 3 The Tenderer understands that any intentional misrepresentation or fraudulent information provided herein shall disqualify the Tenderer's offer herein, as well as any other tender offer(s) of the Tenderer simultaneously being evaluated, or will entitle the Employer to cancel any Contract resulting from the Tenderer's offer herein;
- 4 The Tenderer accepts that the Employer may exercise any other remedy it may have in law and in the Contract, including a claim for damages for having to accept a less favourable tender as a result of any such disqualification due to misrepresentation or fraudulent information provided herein;
- 5 Any further documentary proof required by the Employer regarding the information provided herein, will be submitted to the Employer within the time period as may be set by the latter;

**Signed by the Tenderer**

<b>Name of representative</b>	<b>Signature</b>	<b>Date</b>

^ All applicable taxes^ includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies



public works  
& infrastructure

Department:  
Public Works and Infrastructure  
REPUBLIC OF SOUTH AFRICA

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## TERMS OF REFERENCE

# APPOINTMENT OF A SERVICE PROVIDER FOR THE COMPILATION, ANALYSIS OF OPERATIONAL PLANS AND PERFORMANCE INDICATOR MAPPING FROM OPERATIONAL PLAN TO THE ANNUAL PERFORMANCE PLAN

Strategic Management Unit

2021



## **1. PURPOSE OF THE ASSIGNMENT**

The National Department of Public Works and Infrastructure (hereinto referred to as the Department) seeks to identify and appoint an experienced company to compile, analyse operational plans and map performance indicator from Annual performance plan (APP) to Annual Operational Plan (AOP). In the process, impart skills to the planning team.

## **2. CONTEXTUAL BACKGROUND**

The Department of Public Works and Infrastructure are required to develop Annual Operational Plans (AOP) each year. These plans must support/feed the Annual Performance Plans (APPs) and contribute to the Department's Strategic Plan (SP). These plans are underpinned by the theory of change - a planning approach that focuses on outcomes or results. Operational Plans detail the outputs at operational level, activities, and costs per activity and associated risks for all the programmes. These outputs and activities must demonstrate their contribution and alignment to the APP. Further, the Ops Key Performance Indicators (KPIs) and targets must be mapped to the APP. Therefore, the linkage between the two plans should be logical and sound. Furthermore, the necessary costing must be done for key activities which requires a level of activity based costing. The operational plans must consider both the internal and external dependencies critical in the delivery chain. The SP and APP has KPIs that must be cascaded into the AOP.

## **3. SCOPE OF THE ASSIGNMENT**

The work entails 5 critical areas –

- Compilation of the Annual Operational Plan (AOP)
- Analysis of the information pertaining to the operations of the Department and the compilation of an internal environment report.
- Mapping of Key performance indicators (forward and backward mapping) on all the plans (SP, APP and AOP)
- Identification of key activities with budget implications to align the budget to activities and priorities set for the Department for the financial year under review.
- Impart skills and knowledge on the KPI mapping and logical reasoning of various levels of planning to the planning team.

The Service Provider will be required to work closely with the Strategic Management Unit (SMU). Also, no information **shall** be provided to the Service Provider without the consent of the Project Leader (in this case, the Head of the Unit).

## 5. CONDITIONS OF CONTRACT

The conditions of contract applicable to this appointment will be the special conditions of contract stipulated in Section 8 of this document as well as General Conditions of Contract for Goods and Services [PA-10] attached.

## 6. FORMAT OF QUOTATION TO BE PROVIDED

The Service Provider (at own cost) must prepare and submit a quote as outlined below:

- All material submitted should be relevant to the subject matter.
- Proposals shall be submitted in English.

## 7. PROPOSAL SUBMISSION

The proposal **MUST** include (a) Profile of the organisation detailing their areas of focus (b) demonstrate experience of work done (related to the request) in the public sector. **Failure to provide this information will be to the disadvantage of the bidder.**

The proposal **must** also consist of the following for purposes of evaluation:

7.1 A **schedule of work/project done** by the service provider as per (or reflecting information stated on) the table below must be submitted alongside the proposal.

No.	Type of work/project Completed	Duration of the work/Project	Name of public department/public entity for which the work was done	Name of contact person in the organisation (Project Manager)
1				
2				
3				
4				
5				

7.2 A well-documented **Project Execution Plan** including the time frames that have been specified for the following:

- (a) Compilation of the Operational Plan
- (b) Analysis of information and compilation of internal environment report
- (c) Mapping of Key performance indicators
- (d) Identification of key activities with budget implications
- (e) Skills and knowledge Development plan

7.3 Detailed **Project Costing Schedule** outlining the following:

Deliverable	Item/Output	Unit of measure	Quantity	Rate	Total
Compilation of the Operational Plan	Operational Plan	Each	1		
Analysis of the information pertaining to the operations of the Department and the compilation of an internal environment report.	Analytical Report on Internal environment	Each	1		
Mapping of Key performance indicators (forward and backward mapping) on all the plans (SP, APP and AOP) – Generic business Process	KPI Matrix	Each	1		
Identification of key activities with budget implications to align the budget to activities and priorities set for the	Activity Matrix and Budget	Each	1		

Deliverable	Item/Output	Unit of measure	Quantity	Rate	Total
Department for the financial year under review.					
Impart skills and knowledge on the KPI mapping and logical reasoning of various levels of planning to the planning team.	Skills Development Plan	Each	1		
<b>Total Cost</b>					

All costs must be inclusive of value-added tax where applicable.

#### 8. SPECIAL CONDITIONS OF CONTRACT

The special conditions applicable to this project are outlined in the table below. Service Providers must indicate if they concur with the conditions by clearly completing the table. **Failure to complete the table will lead to disqualification. Proposals that do not reflect concurrence with any of the conditions will not be considered.**

Condition	Concurrence		Reason / Comment (If any)
	YES (X)	NO (X)	
8.1 Entry meeting with the SMU at least 2 working days after receipt of the appointment letter from the Department to carry out the project. This entry meeting will discuss and draft a project plan.			
8.2 Final/Approved Project plan to be presented to the Department 5 working days after the entry meeting.			
8.3 Provide a skills and knowledge transfer plan within 14 working days from the date of the entry meeting. This is not a generic skills and knowledge transfer plan but detailed as per the action items in the project plan (8.3) and for the intended purpose as highlighted in section 3 (fourth bullet).			





8.4	Compilation of the Operational Plan must be completed in 4 months (including a meeting with the department) after receiving a letter of appointment from the Department to which during that time, the Service Provider should have contacted the SMU to discuss the approach in line with the department's strategy (The project should be completed before 31 <sup>st</sup> March 2022).			
8.5	Analysis of information and compilation of the internal environment report. This information helps to determine the capacity and ability of the department to meet the operational targets. The report must be completed within 4 months from the date of appointment.			
8.6	The Service Provider must make resources available after hours and over weekends which must be included in the cost of this quotation. This will not be paid as an additional cost to the Department.			
8.7	The successful service provider shall continually be engaged until the conclusion of the project.			
8.8	Copyright: All information generated, communication produced, and data acquired, and any other material produced under the auspices of this project remains the intellectual property of the Department.			
8.9	Confidentiality: The Service Provider will be bound by the same clause of confidentiality and code of ethics as applicable to officials of the Public Service.			
8.10	The Department will not be held responsible for any costs incurred by the bidder/s in the preparation and submission of the quotations.			
8.11	Travelling costs and time spent or incurred between home and office of service providers and the Department's Head Office will not be for the account of the Department.			
8.12	<u>For risk assessment purposes</u> , the Department may contact department(s) where work/services were previously rendered. The Department reserves the right to neither make any appointment nor issue prior notice of any contact with the department where work/services were previously rendered. Furthermore, the department may request bidder(s) to provide samples of work previously completed. Failure to respond as stipulated by the department may lead to disqualification.			

#### ACCEPTANCE OF THE SPECIAL CONDITIONS AND SPECIFICATIONS

Name of Bidder: \_\_\_\_\_

Name of authorized signatory: \_\_\_\_\_

Signature of authorized signatory: \_\_\_\_\_



**By signing above the bidder hereby accept terms and conditions (general and special conditions) of this quotation and confirm full understanding of the requirements and specifications of this tender.**

## 9. MONITORING PROGRESS ON THE PROJECT

- 9.1 The Department's Strategic Management Unit will be responsible for regular and on-going monitoring and management of the contract with the Service Provider.
- 9.2 The Service Provider is to report progress as and when required to do so (This will also be guided by the approved/agreed Project Plan).

## 10. PAYMENT TERMS

The Department undertakes to pay all valid claims for work done to its satisfaction within 30 days of presentation of a substantiated claim. No payment will be made where there is outstanding information/work by the Service Provider.

## 11. EVALUATION CRITERIA

- 11.1 The minimum functionality score to qualify for further evaluation is **60%**. Bidders that score less than **60%** will be disqualified. 4 categories are determined at 25% share each giving a full share of 100%.

	Functionality criteria	Weight (%)
1.	<b>Company Experience in the compilation of any of the following documents - Strategic Plans / Annual Performance Plans / Operational Plans/ Annual Reports of government departments (experience of the company as a whole in the specific area)</b>	25
	A company with over 4 years' experience in relation to the compilation of the documents mentioned above	5 Points
	A company with up to 4 years' experience in relation to the compilation of the documents mentioned above	4 Points
	A company with up to 3 years' experience in relation to the compilation of the documents mentioned above	3 Points
	A company with up to 2 years' experience in relation to the compilation of the documents mentioned above	2 Points



	<p>A company with less than 1 years' experience in relation to the compilation of the documents mentioned above</p> <p>A company with NO experience in relation to the compilation of the documents mentioned above</p>	<p>1 point</p> <p>0 Points</p>	
2.	<p><b>Successful completion of projects/work on any of the following: Strategic Plans / Annual Performance Plans / Operational Plans/ Annual Reports of government departments within the timeframes. Scoring as follows:</b></p> <p><b>2.1 References letters/Recommendation Letters MUST be provided to show completed work within 3 years<sup>1</sup>.</b></p> <p><b>2.2 The Service provider <u>MUST</u> provide hard copies of <u>any</u> of the following documents as proof of the work/service rendered: Strategic Plans / Annual Performance Plans / Operational Plans/ Reports on performance analysis/Change management or skills development plan</b></p>	<p>5 Points</p> <p>4 Points</p> <p>3 Points</p> <p>2 Points</p> <p>1 point</p> <p>0 Points</p>	25
3.	<p><b>Business process mapping/review and Key Performance Information Matrix</b></p> <p><b>The Service provider <u>MUST</u> demonstrate ability to develop KPI/Activity matrix to show alignment and logic reasoning from input, activity to output and alignment to budget. (Work previously done and completed)</b></p>	<p>5 Points</p> <p>4 Points</p>	25

<sup>1</sup> Using 2020/21 Financial Year as the base year to calculate the 4 year period downwards





	Above Average degree and a copy of work done/model(demonstrate having developed and tested the model and developed a matrix/review in 1 organisations/departments)	<b>3 Points</b>	
	Average degree and a copy of work done/model(demonstrate having developed and tested the model and developed a matrix/review in 1 organisations/departments)	<b>2 Points</b>	
	At least some degree and a copy of work done/model in theory but never implemented	<b>1 point</b>	
	No ability to develop matrix and No evidence	<b>0 Points</b>	
<b>4</b>	<p><b>Availability of resources as follows:</b></p> <ul style="list-style-type: none"> <li><b>Capacity to do the work and deliver within tight deadlines (where additional resources are required, proof or MOA is required) – Profile of the company detailing expertise and experience in development of organisational plans and Analytical skills. Ability to train and develop skills and impart knowledge, coaching and change management ability (Attach CV's of to reflect the experience of individuals/owners or sub-contracted personnel)</b></li> </ul>		<b>25</b>
	Capacity available (relevant individual expertise) and fully satisfy the request within the company/or MOU with other experts in relation to the request – individual more than 5 years or combined experience of more than 10 years	<b>5 Points</b>	
	Capacity available (relevant individual expertise) and fully satisfy the request within the company/or MOU with other experts in relation to the request – individual more than 4 years or combined experience of more than 7 years	<b>4 Points</b>	
	Capacity available (relevant individual expertise) and fully satisfy the request within the company/or MOU with other experts in relation to the request – individual more than 3 years or combined experience of more than 5 years	<b>3 Points</b>	
	Capacity available (relevant individual expertise) and fully satisfy the request within the company/or MOU with other experts in relation to the request – individual more than 2 years or combined experience of more than 3 years	<b>2 Points</b>	
	Capacity available (relevant individual expertise) and fully satisfy the request within the company/or MOU with other experts in relation to the request – individual less than 2 years or combined experience of more than 2 years	<b>1 point</b>	
	No capacity available (relevant individual expertise) and poor level of satisfaction in relation to the request – No individual experience and No combined	<b>0 Points</b>	
	<b>Total Weight</b>		<b>100</b>

11.3 A 5 point functionality evaluation criteria will apply. Each functionality criteria and scoring has a weight of 5. Meaning that in each category – if a bidder is scored a 3, that category carries 15 points



(3x5). This translates to 100 points (4 categories with a maximum point set at 5 and a weight of 5). If a bidder scores 3 in all categories, that have a total score of 60 points (Score of 3 x 5 (weight) x 4 (categories)) and this total score is used to determine the minimum functionality

## **12. FURTHER INFORMATION**

### **CONTACT DETAILS**

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