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REQUEST FOR QUOTATION NO: HR – 4208738– 2024/2025

APPOINTMENT OF A SERVICE PROVIDER TO TRAIN AND CERTIFY MUNICIPAL FINANCE BOARD MEMBERS ON MFMA AS COMPETENCE REQUIREMENTS (MUNICIPAL REGULATIONS ON MINIMUM COMPETENCY LEVELS – GAZETTE NO 29967, 15 2007)

Issued by:
The Joburg Market: Supply Chain Department
P.O. Box 86007 Fortune Road City Deep Johannesburg 2049
<u>quotations@joburgmarket.co.za</u>
for enquires

Full name of bidding/tendering entity: _____

Contact Person: _____

Tel Number: _____

Contract Price (excl VAT): _____

Contract Price (incl. VAT): _____

Advert date: **07 February 2025**

Closing date and time: **14 February 2025 @ 11H00**

Submission: **quotations@joburgmarket.co.za**

Bidders to submit a quotation as per the scope of work

1. Project Description

Appointment of a service provider to train and certify Municipal Finance Board members on MFMA as competence requirements (municipal regulations on minimum competency levels – gazette No 29967, 15 2007)

2. Background

The Municipal Management Finance Program was introduced to assist municipalities to increase their capacity to implement the municipal finance reforms embodied in the MFMA. The MFMP seeks to assist municipalities to develop the knowledge and skills of the municipal budgeting and finance management. It is an organised professional training and work experience programme with the goal of providing high quality training and practical exposure in all aspects of municipal finance management.

3. Scope of work

The successful bidder will be required to develop and deliver comprehensive training to cover the following competencies.

A) Provide training to board members

- King IV Report on Corporate Governance
- Municipal Finance Management Act 56 of (2003)
- Ethics & Risk Management
- Roles and Responsibilities, board committees, management and that of the company secretary
- The importance of alignment of SCM practices to national the national Treasury

B. Deliver Training Certify

- Train and certify approximately 16 Board members including the CEO

C. Targeted training institutions must be provide

- Service provider who has extensive knowledge in the Public Sector Finance
- A sector Provider accredited by South African Qualifications Authority (SAQA)
- Company to be accredited by the QCTO (Quality Council For Trade Occupations)
- Proven and traceable experience in training

4. Delivery address

The training must be done at an offsite venue located within Johannesburg. The training intervention should be executed within 3 days.

Conference Venue Hire (Venue to be within a 100km from central JHB)

- 3-day full conference venue
- The facility should have a projector, Wi-Fi connection, flip charts, notepads, pens, water and sweets
- All meals are to be included (**breakfast, mid-morning tea, lunch, afternoon tea**)
- Provide brochures of the two proposed venues. Please note failure to submit will render your bid invalid

5. Required documents

Please note that failure to meet the requirements or to lodge the following documentation and/or proof thereof may lead to an immediate disqualification:

ADMINISTRATIVE REQUIREMENTS (RETURNABLES)

- a) Completed and signed MBD 3.1, 4 and 6.1
- b) General Condition of Contract (GCC) must be signed
- c) All pages of the document must be initialled
- d) Consent and acknowledgments form in terms of the Protection of **Personal Information Act (Act 04 of 2013) as amended**
- e) Rates and taxes account not older than three months or signed lease agreement
- f) Proof of JV bank account (if applicable)
- g) Copies of share certificates (if applicable)

6. Evaluation criteria

Bidders will be evaluated in terms of functionality as part of the minimum requirements before being evaluated on price and Specific goals.

CRITERION	WEIGHTING
Certification	20
Past Relevant Experience - attach signed reference letters from contactable references on the client's letterhead. the references must contain the following information: <ul style="list-style-type: none">• Name of the organization and contact person• Description of the services provided• Telephone number and/ or email address• Signed and dated• Letters must clearly indicate the period that the work was executed	35
Project approach and methodology	15
Qualifications & Skills Of Resources	20
Company Profile	10
TOTAL	100

FUNCTIONALITY

NB! The minimum cut off points for functionality is 80 points out of 100 points and any bidder scoring less than 80 points will not be considered for further evaluation

Certification	Total – 20 points
The bidder must provide a valid accreditation from the relevant SETA <ul style="list-style-type: none"> • A sector Provider accredited by South African Qualifications Authority (SAQA) – 10 points • Company to be accredited by the QCTO (Quality Council for Trade Occupations) – 10 points 	20 points
Past relevant experience undertaken in relation to the scope of work (project) within the last five (5) years.	Total – 35 points
Three (3) or more references – 35 points Two (2) references – 25 points One (1) reference – 15 points No reference letters – 0 points	35 points
Project approach / plan and methodology	Total – 15 points
Detailed concept paper related to scope of work – 15 points Non submission of detailed concept paper related to scope of work – 0 points	15 points
Qualifications & Skills Of Resources. Attach detailed CVs of Personnel & Qualifications such as; Diploma / Cert in OD ETP demonstrating the ability to execute the full scope of work related to training at Board / Executive Level	Total – 20 points
Key Staff: <ul style="list-style-type: none"> • Diploma and 5 or more years' experience of two (2) resources in providing training interventions within the public sector – 20 points • Diploma and 3 years' experience of two (2) resources in providing training interventions within the public sector – 15 points • Diploma and 2 years' experience of two (2) resources in providing training interventions within the public sector – 10 points • No experience – 0 points 	20 points
Company Profile	Total – 10 Points
A bidder must provide a detailed company profile that specializes in training and development – 10 Points No submission – 0 Points	10 Points

Note: A bidder/s that scores less than 80 points in respect of functionality, or submits solutions that are not according to requirements will be regarded as submitting a non-responsive bid and will be disqualified.

Bidder/s that meet the minimum required percentage or minimum points, will be evaluated in terms of price and specific goals as per the PPPFA Act, No.5 of 2022 and its associated Regulations issued by the National Treasury.

**PRICING SCHEDULE – FIRM PRICES
(PURCHASES)**

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of Bidder..... Bid Number.....

Closing Time Closing Date

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

Item	Description	Amount
1	Training interventions	
2	Training venue	
3.	Other specify	
		VAT
		Total

BID PRICE IN RSA CURRENCY (ALL APPLICABLE TAXES INCLUDED)**

- Does the offer comply with the specification(s)? *YES / NO
- If not to specification, indicate deviation(s)
- Period required for delivery
*Delivery: Firm / Not firm
- Delivery basis

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

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

*Delete if not applicable

DECLARATION OF INTEREST

No bid will be accepted from persons in the service of the state¹.

1. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.

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

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

3.2. Identity Number:

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

3.4. Company Registration Number:

3.5. Tax Reference Number:.....

3.6. VAT Registration Number:

3.7. The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8. Are you presently in the service of the state?

YES	NO
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3.8.1. If yes, furnish particulars.

¹MSCM Regulations: "in the service of the state" means to be –

- (a) a member of –
 - (i) any municipal council;
 - (ii) any provincial legislature; or
 - (iii) the national Assembly or the national Council of provinces;

- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of 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);

- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) an employee of Parliament or a provincial legislature.

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

3.9 Have you been in the service of the state for the past twelve months?

YES	NO
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3.9.1. If yes, furnish particulars.....

3.10 Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid?

YES	NO
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3.10.1. If yes, furnish particulars.

3.11 Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid?

YES	NO
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3.11.1. If yes, furnish particulars

3.12 Are any of the company’s directors, trustees, managers, principle shareholders or stakeholders in service of the state?

YES	NO
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3.12.1. If yes, furnish particulars.

3.13 Are any spouse, child or parent of the company’s director’s trustees, managers, principle shareholders or stakeholders in service of the state?

YES	NO
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3.13.1. If yes, furnish particulars.....

3.14 Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract.

YES	NO
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3.14.1. If yes, furnish particulars:.....

4. Full details of directors / trustees / members / shareholders (If employed by the state)

Full Name	Identity Number	State Employee Number (If employed by the state)

.....
Signature

.....
Date

.....
Capacity

.....
Name of Bidder

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

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

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

1. GENERAL CONDITIONS

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

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

a) The applicable preference point system for this tender is the 80/20 preference point system.

1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.3 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.4 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all

4. POINTS AWARDED FOR SPECIFIC GOALS

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

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Means of verification Evidence must be provided to claim points	Number of points allocated (80/20 system)	Number of points allocated (80/20 system) (To be completed by the bidder)
Business Owned by 51% or more – Black Youth	CSD, Valid B-BBEE Certificate/Affidavit Sworn under oath, ID copy of owner/s of the business	2	
Business Owned by 51% or more – Black People with Disabilities	CSD, ID copy of owner/s of the business	2	
SMMEs (an EME or QSE)	CSD, and B-BBEE Certificate/ Affidavit Sworn under oath	6	

Enterprise located within the City of Johannesburg Metropolitan Municipality	CSD and Proof of municipal account	10	
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DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

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

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:
.....