



City of Johannesburg
Johannesburg Development Agency

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INVITATION TO QUOTE

www.jda.org.za
www.joburg.org.za

REQUEST FOR FORMAL WRITTEN PRICED QUOTATIONS

ADVERT DATE: 13 OCTOBER 2025

CLOSING DATE: 21 OCTOBER 2025

CLOSING TIME: 12H00

RFQ DESCRIPTION: RFQ –JDA BOARD STRATEGIC PLANNING FACILITATION SERVICES FOR TWO DAYS

RFQ NUMBER: JDACOSEC/FACILITATOR/10/2025

RFQ DOCUMENTS MUST BE DEPOSITED IN THE BID BOX SITUATED AT:
Offices of the Johannesburg Development Agency, 3 Helen Joseph Street, The Bus Factory, Newtown, Johannesburg, 2000

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

NB: NO RFQ SUBMISSION WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE (see definition below)

*MSCM 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.

ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:

Department: Procurement
Tel: 011 688 7800

Contact Person: Mr. Thapelo Kgaphola
E-mail: tkgaphola@jda.org.za

ANY ENQUIRIES REGARDING TECHNICAL INFORMATION MAY BE DIRECTED TO:

Department: Company Secretary Office
Tel: 066 475 5948

Contact Person: Ms. Sophia Ndhlovu
E-mail: sndhlovu@jda.org.za

PLEASE NOTE: SUBMISSIONS MUST BE SUBMITTED ON THE RFQ DOCUMENTATION ISSUED. RFQ DOCUMENTATION MUST NOT BE REPRODUCED OR REARRANGED. ANY ADDITIONAL INFORMATION MUST BE SUBMITTED AS A SEPARATE ATTACHMENT TO THE TENDER DOCUMENT FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED.

RFQ – JDA BOARD STRATEGIC PLANNING FACILITATON SERVICES

OFFER

**THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED)**

NAME OF BIDDER

BID DESCRIPTION

BID NUMBER

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER CODE NUMBER

CELLPHONE NUMBER

FACSIMILE NUMBER CODE NUMBER

E-MAIL ADDRESS

COMPANY REGISTRATION NUMBER

NATIONAL CENTRAL SUPPLIER DATABASE NUMBER

VAT REGISTRATION NUMBER

TAX VERIFICATION PIN NUMBER

SUB TOTAL BID PRICE..... Excluding Value Added Tax

15% VAT

TOTAL BID PRICE..... Including Value Added Tax

TOTAL BID PRICE in words

..... excluding Value Added Tax/ including Value Added Tax (please circle the relevant one)

SIGNATURE OF BIDDER

CAPACITY UNDER WHICH THIS BID IS SIGNED

DATE

THE ABOVE PARTICULARS MUST BE FURNISHED. FAILURE TO DO SO WILL RESULT IN THE BID BEING DISQUALIFIED

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- G : Detailed Specification including images

To all Stake Holders**RE: The channels of reporting fraudulent and Corrupt Activities**

The City of Johannesburg has a **zero-tolerance approach to Fraud, Theft, Corruption, Maladministration, and Collusion** by suppliers with employees.

To reinforce this commitment, more channels have been added to report any Fraudulent and Corrupt activities.

Instances of corporate fraud and misconduct remain a constant threat to service delivery. The City of Johannesburg took a resolution to adopt strategic interventions aimed at combatting fraud and corruption.

The City took a decision to centralize the reporting of fraudulent and corrupt activities through the establishment of an independent fraud hotline.

All people doing business with the Johannesburg Development Agency are encouraged to report any corrupt or illegal practice.

Employees are encouraged to report fraud, waste or other concerns suggestive of dishonest or illegal activities.

Anyone can report fraudulent and corrupt activities through one of the following channels:

- Toll free number: 0800-0025-87 (all official languages)
- Email Address: whistle@joburg.org.za
- Walk in: 48 Ameshhof Street, SAPPI Building, East Wing, 5th Floor
- Social Media Pages: Facebook (Group Forensic and investigation services GFIS) and Twitter (@cojgfs)
- Management Request and referrals: Various Departments and Entities



Let's join hands to take up the Fight against Fraud and Corruption in our society.

WE ENCOURAGE ALL PEOPLE DOING BUSINESS WITH US TO REPORT ANY CORRUPT OR ILLEGAL PRACTICE

1. INTRODUCTION

The Johannesburg Development Agency (JDA) is requesting written quotations from experienced service providers to provide to facilitate the Johannesburg Development Agency's two-day strategy planning session to be held from 9 February 2026 to 10 February 2026.

It is expected that the strategy facilitation session will be eight hours on both days. The experienced strategy facilitator is required to facilitate the board alignment on vision, mission, and strategic outcomes; guiding the use of strategic tools like SWOT and scenario planning; ensuring active board participation and consensus-building; providing comprehensive reports on decisions and action plans; and supporting the development of the organisation's 5-year strategic plan.

A facilitation service for a board strategic planning session to involve guiding the board through a structured process to define a strategic direction, develop objectives, and create an action plan. This typically includes pre-session planning, facilitating discussions, managing time, and ensuring all participants are engaged. The facilitator should help the board clarify its mission, vision, and values, analyse the current situation (including SWOT analysis), and identify strategic priorities.

The facilitator should have strong strategic thinking, communication, and conflict resolution skills; must be adept at guiding discussions, managing group dynamics, and ensuring productive outcomes during the strategy planning sessions. Key specifications include experience in strategic planning, functional diagnosis, and risk management, as well as the ability to remain objective and independent while working with diverse individuals.

By engaging a skilled facilitator, boards can ensure that their strategic planning sessions are productive, focused, and result in a clear and actionable strategic plan.

2. SCOPE OF WORK AND DELIVERABLES

2.1. Scope of Work and Deliverables

The successful service provider to facilitate the JDA's two-day strategic planning session to be held from 9 February 2026 to 10 February 2026 with approximately 25 people.

The participants will include the JDA Board members and executive managers.

2.1.1 Expected Deliverables:

- **Facilitate Strategic Alignment:**
Guide the board in reviewing and defining the organisation's vision, mission, values, and strategic outcomes for the next 5 years. Work with the board and executive management to clearly define the purpose and desired outcomes of the strategic planning session.
- **Promote Active Participation**
Collaboratively develop a comprehensive agenda, framework, and structured approach for the strategic planning session with the board chairperson and executive management.
- **Apply Strategic Methodologies:**
Lead the application of relevant strategic planning tools and techniques such as SWOT analysis, scenario planning, and risk assessments.
- **Foster Consensus**
Build consensus among participants to ensure buy-in and commitment to the agreed-upon strategic direction and priorities.
- **Document and Report Outcomes**
 - Capture key insights, decisions, and action points from the sessions and consolidate them into a comprehensive report for the board.
 - Summary of day 1 to be developed for presentation on day 2.
 - List of session outcomes/resolutions to be shared with the Board Chairperson and Chief Executive Director within 3 days after the session.
 - A detailed report on the purpose, discussions, and outcomes of the strategy session is to be submitted to the board chairperson and executive management within 7 days after the planning session. This will include a closeout report.
- **Support Strategic Plan Development**
Provide support in translating strategic priorities into performance indicators and targets for the Annual Performance Plan (APP).
- **Preparation & Process Objectives**
Gain an in-depth understanding of the JDA's mandate, current strategies, and policies to inform the facilitation process.
- **Design a Methodology**
Develop and design a proper facilitation methodology to encourage innovation and engagement from the board and management.
- **Manage the Session Flow**
Direct and manage the flow and pacing of the entire strategic planning session to ensure it stays on track and productive.

2.1.2 Reporting Objectives

- **Comprehensive Report**
Submit a comprehensive report summarising key discussions, decisions, and outcomes, including recommendations and next steps. Translate the strategic plan into a detailed action plan with specific tasks, timelines, and responsible parties.
- **Strategic Plan Inputs**
Provide input and support for the formulation and finalisation of strategic planning documents, such as the 5-year Strategic Plan and the Annual Performance Plan. A detailed report on the purpose, discussions, and outcomes of the strategy session is to be submitted to the board chairperson and executive management within 7 days after the session. This will include a closeout report. Share the strategic plan and action plan.
- **Provide Recommendations**
Include actionable recommendations and next steps in the final report to guide the organisation's implementation of the strategy.

3. NOTES FOR PRICING

The basis for fee proposals is outlined in item 3.1 below.

This is followed by item 6 which applicants are required to take note of.

3.1 Tenderers are to complete all the items on the pricing table below and submit as part of their fee proposal to transfer or carry over the total fee to the "Offer" page correctly.

Failure to complete in full the pricing table and price as required will result in the tender being disqualified for non-compliance.

3.1. 2 The Service Provider must provide the following information:

- Company Profile overview that reflects the relevant experience in facilitating strategic planning at the board level in the public sector
- Company Experience Reference Letters. At least 3 contactable reference letters from previous clients as evidence of previous related work for strategic planning facilitation at the board level successfully completed.
- Demonstrate experience in facilitating strategic planning at the board level in public entities.
- Capabilities and competencies of the facilitator/ Qualifications and number of years' experience facilitating board strategic planning sessions.

- Methodology and Approach to design and facilitate the Strategic Planning Session at the board level.

Detailed below is information upon which fees must be based on (**refer to item 2 above for detailed scope of work**).

TOTAL FEE TO BE TRANSFERRED CORRECTLY TO THE OFFER PAGE

Tenderers must ensure that the final TOTAL FEE is correctly carried to the “offer” page. The value recorded on the offer page will be regarded as the quoted amount.

Failing to price as required will result in the RFQ document being disqualified.

3.2 Notes

- 3.2.1** Tenderers must ensure that the final **PRICING TABLE TOTAL FEE** is correctly carried over to the “offer” page. The total value recorded as total of pricing table must be the same as the one recorded on the offer page, which will be regarded as the quoted amount to render services.
- 3.2.2** **Failing to price as required will result in the RFQ submission being disqualified.**
- 3.2.3** Fees **must** include standard disbursements such as typing, reproduction, copying, binding of documents, telephonic / electronic and facsimile communications, courier, local travel and accommodation, etc.
- 3.2.4** It is the responsibility of the bidder to ensure that they have a local office within the geographical area of City of Johannesburg as the JDA will not be responsible for accommodation and travelling costs.
- 3.2.5** That the RFQ is issued out in line with POPI Act.
- 3.2.6** That the RFQ shall be evaluated in accordance with PPR 2022
- 3.2.7** Bidders are to factor in a fixed pricing for the duration of the appointment.

4. PRICING TABLE

Nature of Work	Cost (R)
Facilitation of a two-day JDA Board Strategic Planning Session	
Sub Total Cost (VAT exclusive)	R
15% VAT	R
Total Cost (VAT inclusive)	R

The total price to be correctly transferred to the offer page, and failure to do that, bidders will be disqualified including no quoting / pricing all item correctly.

5.1. PRESENTATION OF QUOTATIONS

Submissions are to consist of a short (**not to exceed 15 pages**) and comprehensible report that must provide the JDA with sufficient information to make a sound and fair evaluation of the

quotation as well as the experience and capability of the applicant to undertake and manage the project successfully.

The report should **use the same item numbers as below** for the required sections of the report.

The following information must be clearly spelt out:

- A copy of a valid SARS Tax Pin Compliant certificate. No award will be made to a service provider whose tax matters are not in order with the South African Revenue Services.
- No award will be made to a service provider who is not registered with National Treasury Central Supplier Database.
- A copy of the tenderer's latest municipal rates account in the name of the tenderer or alternatively in the names of the Directors / Partners of the tendering entity. Copies of lease agreements **will be accepted**.
- An original and valid BBBEE status levels verification certificate or a certified copy thereof, substantiating the bidding entities BBBEE rating. Only certificates issued by verification agencies accredited by the South African Accreditation System (SANAS), or by registered auditors approved by the Independent Regulatory Board of Auditors (IRBA) will be accepted. An EME must submit an affidavit confirming the following:
 - Annual Turnover Revenue of R10 million or less; and
 - Level of Black ownership
 - Any misrepresentation in terms of bullet point above constitutes a criminal offence as set out in the B-BBEE Act as amended.
- An original letter from the tenderer's bank confirming account information.
- Bidders are required to submit detailed quotations based on the required deliverables defined in rand terms. Applicants are to illustrate the fee proposal linked to deliverables. All disbursements, etc. are to be **included** in the quotations.
- A completed RFQ document with all sections filled in (references in the RFQ to other documentation attached will NOT be considered.)
- The forms A to F annexed, must be scrutinized, completed in full and submitted together with your RFQ.

Failure to comply with the requirements in item 2 and 3 will result in tenderers been negatively scored for responsiveness or disqualified for non-compliance.

Note for consortium and joint ventures.

- The items above are to be addressed and completed by **EACH** member of the consortium or joint venture.
- An agreement between all parties of the consortium or joint venture is to accompany the tender submission.
- A trust, consortium or joint venture will qualify for points for their BBBEE status level as an unincorporated entity, provided that the entity submits their consolidated BBBEE scorecard as if they were a group structure and that such a consolidated BBBEE scorecard is prepared for every separate tender.

Failure to comply with these conditions may invalidate your offer.

5.2 TECHNICAL REQUIREMENTS AND EXPERIENCE

- Tertiary qualification in either Commerce/Public or Business Administration
- At least 10 years' experience facilitating strategic planning at the board level or similar sessions for diverse stakeholders within the public sector.
- Strong Facilitation Skills with a proven record of facilitating strategic planning sessions at the board level.
- Strong Report Writing Skills. Ability to produce clear, concise, and actionable strategic planning reports.
- Demonstrated expertise in organisational strategy and strategic planning facilitation.
- Strong knowledge of corporate governance principles, including King IV principles.
- Understanding of the specific sector and mandate of the JDA
- Experience in monitoring and evaluation

6. ASSESSMENT CRITERIA

Submissions will be evaluated on the criteria to follow

- Compliance
- Technical
- Price and Specific Goals
- Risk tolerance.

a. Compliance

Bidders will be disqualified for:

- If any of its directors are listed on the register of defaulters;
- In the case of a bidder who during the last five years has failed to perform satisfactorily on previous contracts with the JDA or any other organ of state after written notice was given to that bidder that performance was Unsatisfactory, Or the contract was terminated.
- Bidders who did not complete, in full, the tender offer page and the pricing table (i.e. priced, all registration numbers provided and signed);
- Bidders whose quotation document has been completed in pencil;
- Bidders whose documents have been faxed;
- Bidders whose quotation document has been received after the closing time;
- Bidders whose quotation document has not been deposited in the tender box at the time of closing;
- Bidders who fail to price as required i.e. as stipulated in item 3 and 4 herein;
- Bidders who have any directors in the employment of the state;
- Bidders who failed to attend a compulsory briefing meeting session;
- Bidders whose tax matters are not up to date;
- Bidders whose directors have municipal accounts that are owing more than 90 days;
- Bidders who are not registered with the National Central Supplier Database;

b. Technical Criteria

Total points = 100 at 70 % and cut off is 70 points

Technical Criteria	Scoring	Points
Company Profile Bidders must submit a company profile and overview that reflects the following: <ul style="list-style-type: none"> - Experience in strategy planning at the board level in the public sector 	Company profile attached = 5 points No company profile attached = 0	5
Company Experience: Reference Letters Contactable reference letters from previous clients as evidence of previous related work for strategy planning facilitation successfully completed. NB: The Reference Letter(s) must not be older than 4 years, must be on the letterhead of the previously serviced client, and should reflect at least the name of the client, title of the related work conducted, year(s) conducted and completed, contactable reference name and contact details, and signed by the appropriate delegate. The Reference Letter should indicate the quality of the service rendered.	Evidence in the form of a reference letter indicating that they have work experience in strategy facilitation. 3 letters attached = 20 points 2 letters attached = 15 points 1 letter attached = 10 points No reference letters attached = 0	20
Facilitator's experience in facilitating board strategic planning sessions in the public sector. Demonstrated experience in facilitating board strategic planning at the board level in public entities.	3 or more reference letters attached = 5 Less than 3 letters = 0	5
Capabilities and competence of the facilitator CV of the facilitator attached, and the facilitator has at least 10 years' experience facilitating strategic planning at the board level in public entities. Bidders must attach relevant certified copies of their highest qualifications/certificates. Certification may not be older than 3 months before submission. Uncertified qualifications/professional certificates will not be accepted as authentic. Foreign qualifications must be accompanied by a SAQA evaluation.	Qualifications Tertiary qualification in either Commerce/Public or Business Administration = 10 points Irrelevant/less qualification = 0 points	10

<p>Experience of the Facilitator</p> <p>Demonstrated experience in facilitating strategic planning sessions at the board level in public entities.</p>	<p>At least 10 years of experience facilitating strategic planning sessions at the board level in public entities.</p> <p>Proven track record facilitating strategic planning sessions at the board level in public entities.</p>	<p>20</p>
<p>Methodology and approach</p> <p>The bidder must provide clarity and an effective approach to facilitation of the strategic planning session at the board level.</p> <ul style="list-style-type: none"> - The bidder should demonstrate knowledge of strategic planning principles, tools, and best practices, and how he/she will assist the board and management in translating strategic goals into actionable plans. - Bidder must demonstrate understanding of the organisation's context, mission, and objectives of the Johannesburg Development Agency (JDA); this should include awareness of the organisation's mandate, stakeholders, and operating environment. - Indicate how the facilitator will synthesize information and present findings effectively. 	<ul style="list-style-type: none"> - The proposed methodology and approach align with the scope of work, the timeframes, and the project plan are suited and tailored to the project needs. = 40 points - The proposed methodology and approach are generic and minimally meet project requirements = 5 - Non-submission = 0 	<p>40</p>

6.1 Price and Preferential Goals

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

The 80/20 preference point system will apply to this tender and the lowest acceptable tender will be used to determine the applicable preference point system. The 80/20 price/preference points system will be applied to the evaluation of responsive tenders up to and including a Rand value of R50'000'000 (all applicable taxes included), whereby the order(s) will be placed with the tenderer(s) scoring the highest total number of adjudication points.

Preference points shall be based on the Specific Goal as per below:

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Awards UP TO R50 mil (VAT Inclusive)

The specific goals allocated points in terms of this RFQ	Number of points allocated (80/20 system) (To be completed by the organ of state)	Evidence
Business owned by 51% or more – Black People	5	<ul style="list-style-type: none"> • Valid BBBEE certificate / Affidavit Sworn under oath • Company Registration Certification • Certified copy of ID of owners of the business and shareholders certificate
Business owned by 51% or more - Women	10	<ul style="list-style-type: none"> • Valid BBBEE Certificate/ Affidavit Sworn under oath • CSD report
SMMEs (An EME or QSE)	5	<ul style="list-style-type: none"> • Valid BBBEE Certificate/ Affidavit Sworn under oath • CSD report
Total Points	20	Failure to attach evidence will lead to scoring zero points

6.2 RISK TOLERANCE

The JDA has adopted a Risk Tolerance Framework (RTF) which enjoins the JDA to consider its risk exposure to contractors / service providers in terms of the number of contracts awarded to a single contractor / service provider in a particular year.

In terms of the Risk Tolerance Framework, the JDA determines the risk exposure as excessive in instances where the value of the contracts for individual professional service providers (eg. project managers / engineers / quantity surveyors / consultants) is either :

The greater of R8 million or four contracts / projects in the current financial year or

The greater of R12 million or six contracts / projects over two financial years (current year and previous financial year)

And in instances where the value of contracts for multi-disciplinary professional service providers (eg. more than one discipline / service is provided by the same bidder) is either :

The greater of R12 million or six contracts / projects in the current financial year or

The greater of R20 million or nine contracts / projects over two financial years (current year and previous financial year)

A risk analysis shall be undertaken on the bidder with the highest number of points obtained, to determine whether the tenderer does not exceed the JDA's risk framework criteria as stated above. In other words, whether it falls within the ambit of the Risk Tolerance Framework as acceptable.

JDA reserves the right to award a contract to a bidder who has exceeded the threshold as stated above.

7. CLOSING DATE, TIME AND VENUE FOR SUBMISSIONS

The words “**RFQ –JDA BOARD STRATEGIC PLANNING FACILITATION SERVICES FOR TWO DAYS**” must be written / typed clearly on the envelope.

The envelope must be deposited in the tender box at the Johannesburg Development Agency, Ground Floor, The Bus Factory, 3 Helen Joseph Street (formerly known as President) and Newtown, 2000 only between the hours of 08H00 and 17H00.

The RFQ closes at 12h00 on 21 October 2025.

NO E-MAILED/ NO LATE / TELEPHONIC / FAXED / POSTAL TENDERS WILL BE ACCEPTED OR CONSIDERED.

The Johannesburg Development Agency’s selection of qualifying tenders shall be in the Johannesburg Development Agency’s sole discretion and shall be final.

The Johannesburg Development Agency does not bind itself to accept any RFQ submission and no correspondence will be entered into.

Unsuccessful bidders will have the opportunity to query the award within 14 working days of the publication of the successful bidder on the JDA website.

Tender validity is 90 days.

Queries can be addressed in writing to:

Sophia Ndhlovu

E-mail: sndhlovu@jda.org.za

ANNEXURE A: BUSINESS DECLARATION

Tender/RFQ Number:

Tender/RFQ Description:

Name of Company:

Contact Person:

Postal Address:

.....

Physical Address:

.....

Telephone Number:

Fax Number:

Cell Number:

E-mail Address:

Company/enterprise Income**Tax Reference Number** :

(Insert personal income tax number if a one person business and personal income tax numbers of all partners if a partnership)

VAT Registration Number:**Company Registration Number:****1. Type of firm**

- ☐ Partnership
- ☐ One person business/sole trader
- ☐ Close corporation
- ☐ Public company
- ☐ Private company

(Tick one box)

2. Principal business activities

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

3. Total number of years company has been in business:**4. Detail all trade associations/professional bodies in which you have membership**

.....
.....

5. Did the firm exist under a previous name?☐ Yes☐ No

(Tick one box)

If yes, what was its previous name?

6. How many permanent staff members are employed by the firm:

Full Time :

Part Time :

7. In the case of a firm which renders services for different disciplines, how many permanent staff members are employed by the firm in the discipline for which you are tendering:

Full Time :

Part Time :

8. What is the enterprise's annual turnover for the last two years and what is the estimated turnover of current commitments.

R Year:

R Year:

R Year:

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9. List all contracts of similar nature which your company is engaged in and have not yet completed:

CONTRACT DESCRIPTION	LOCATION	COMPANY/ EMPLOYER	PROJECT VALUE	ESTIMATED FEES	EXPECTED COMPLETION (MONTH & YEAR)

10. Banking details

I/We hereby request and authorize you to pay any amounts which may accrue to me/us to the credit of my/our account with the mentioned bank.

I/We understand that the credit transfers hereby authorized will be processed by computer through a system known as the “ACB Electronic Fund Transfer Service” and

I/We also understand that no additional advice of payment will be provided by my/our bank, but details of each payment will be printed on my/our bank statement or any accompanying voucher.

This authority may be cancelled by me/us giving **30 days**’ notice in writing.

BANK :

BRANCH :

BRANCH CODE :

ACCOUNT NUMBER :

ACCOUNT HOLDER :

TYPE OF ACCOUNT :

CONTACT PERSON :

CONTACT NUMBER :

PLEASE INCLUDE ORIGINAL SIGNED AND STAMPED LETTER FROM THE BANK CONFIRMING THE COMPANY'S BANKING DETAILS, PHOTOSTAT COPIES AND LETTERS BEARING ELECTRONIC SIGNATURES WILL NOT BE ACCEPTABLE.

The undersigned, who warrants that he/she is duly authorised to do so on behalf of the company, affirms that the information furnished in response to this request for proposal is true and correct:

SIGNATURE :

NAME IN FULL :

CAPACITY :

DULY AUTHORIZED TO SIGN ON BEHALF OF:

DATE :

COMPANY STAMP

ANNEXURE B: DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state*.
2. 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.
3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.
 - 3.1 Full Name:
 - 3.2 Identity Number:
 - 3.3 Position occupied in the company (director, trustees, shareholder**)
 - 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**
If yes, furnish particulars
.....
.....
 - 3.9 Have you been in the service of the state for the past twelve months? **YES / NO**
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**
If yes, furnish particulars
.....
.....

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- 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**

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

If yes, furnish particulars

- 3.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

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 businesses whether or not they are bidding for this contract? **YES / NO**
If yes, furnish particulars

.....

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

[illegible]

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

.....
Position

.....
Name of Bidder

.....
Date

* MSCM 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.

** “Stakeholder” 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.

ANNEXURE C: DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities 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 rejected if that bidder, or any of its directors have:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. wilfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 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	Is the bidder or any of its directors listed on the National Treasury's database as a company or person prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	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)? (To access this Register enter the National Treasury's website, www.treasury.gov.za, 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).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
Item	Question	Yes	No
4.3	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?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		

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4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.7.1	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

.....
Position

.....
Name of Bidder

.....
Date

ANNEXURE D - 1: PARTICULARS OF CONTRACTS AWARDED BY AN ORGAN OF STATE* DURING THE LAST 5 YEARS**

(In the event of insufficient space, kindly attach documentation)

[illegible]

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ANNEXURE D - 2: PARTICULARS OF PREVIOUS CONTRACTS AWARDED BY NOT AN ORGAN OF STATE*** DURING THE LAST 5 YEARS cont.

EMPLOYER	CONSULTANT	SIMILAR NATURE OF WORK	VALUE OF WORK	YEAR COMPLETED

*** Organ of State means-

- ♦ a) a national or provincial department;
- ♦ b) a municipality;
- ♦ c) a constitutional institution defined in the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- ♦ d) Parliament;
- ♦ e) a provincial legislature;
- ♦ f) any other institution or category of institutions included in the definition of "organ of state" in section 239 of the Constitution and recognised by the [Minister](#) by notice in the *Government Gazette* as an institution or category of institutions to which [this Act](#) applies

.....
 Signature
 (of person authorised to sign on behalf of the organisation)

.....
 Position

.....
 Name of Bidder

.....
 Date

ANNEXURE E: CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

“RFQ – JDA BOARD STRATEGIC PLANNING FACILITATION SERVICES”

in response to the invitation for the bid made by:

Johannesburg Development Agency

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

I certify, on behalf of:

(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 will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraph 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.

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10. 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

.....
Position

.....
Name of Bidder

.....
Date

ANNEXURE F: DECLARATION ON STATE OF MUNICIPAL ACCOUNTS

A Any bid will be rejected if:
Any municipal rates and taxes or municipal service charges owed by the bidder or any of the directors to the municipality or a municipal entity, or to any other municipality or municipal entity, are in arrears for more than three months.

B Bid Information

- i. Name of bidder:
- ii. Registration Number:
- iii. Municipality where business is situated.....
- iv. Municipal account number for rates:
- v. Municipal account number for water and electricity:
- vi. Names of all directors, their ID numbers and municipal account number.
 - 1.....
 - 2.....
 - 3.....
 - 4.....
 - 5.....
 - 6.....
 - 7.....

C Documents to be attached.

- i. A copy of municipal account mentioned in B (iv) & (v) (Not older than 3 months)
- ii. A copy of municipal accounts of all directors mentioned in B(vi) (Not older than 3 months)
- iii. Proof of directors
I/We declare that the abovementioned information is true and correct and that the following documents are attached to this form:

.....

.....

Signature

Date

ANNEXURE G – POPI ACT

Form B14: CONSENT AND ACKNOWLEDGMENTS IN TERMS OF THE PROTECTION OF PERSONAL INFORMATION ACT 2013 (POPI)

This section sets out how personal information will be collected, used and protected by Johannesburg Development Agency hereinafter referred to as “JDA”, as required by the Protection of Personal Information Act. The use of the words “the individual” for the purposes of this document shall be a reference to any individual (bidder) communicating with JDA and/or concluding any agreement, registration or application, with the inclusion of each of those individuals referred to or included in terms of such agreement, registration or application.

1. What is personal information?

The personal information that JDA requires relate to names and surnames, birth dates, identity numbers, passport numbers, demographic information, education information, occupation information, health information, addresses, memberships, personal and work email and contact details.

2. What is the purpose of the collection, use and disclosure (the processing) of personal information?

JDA is legally obligated to collect, use and disclose personal information for the purposes of:

- reporting initiatives to the City of Johannesburg Municipality;
 - reporting to National Treasury all contracts awarded;
 - obtaining information related to Tax Compliance information from SARS;
 - verifying information on the National Treasury database of defaulters;
 - evaluating and processing applications for registration on the database;
 - compiling statistics and other reports;
 - providing personalised communications;
 - complying with the law; and/or
 - for a purpose that is ancillary to the above and as may be directed by our POPI manual/Policy.
- Personal information will not be processed for a purpose other than what is identified (the purpose) above without obtaining consent beforehand.

3. How will JDA process personal information?

JDA will only collect personal information for the purpose as stated above and for such specific purpose. Information will be collected in the following manner:

- directly from the individual;
- from service providers who provided with services or goods to JDA;
- from JDA's own records relating to previous supply of services or goods; and/or
- from a relevant public or equivalent entity.

4. To whom will personal information be disclosed?

JDA

The personal information may be disclosed to other relevant public or other entities on whose behalf we act as intermediaries, other third parties referred to above in relation to the purpose or who are sources of personal information, service providers such as professional bodies who operate across the borders of this country (transborder flow of information) where personal information must be sent in order to provide the information and/or services and/or benefits requested or applied for. In the event of another party/ies acquiring all of or a portion of JDA's mandate or functions, personal information will be disclosed to that party but they will equally be obliged as we are, to protect personal information in terms of this policy and the law.

5. Consent and Permission to process personal information:

I hereby agree with the policy and provide authorisation to JDA to process the personal information provided for the purpose stated:

- I understand that withholding of or failure to disclose personal information will result in JDA being unable to perform its functions and/or any services or benefits I may require from JDA.
- Where I shared personal information of individuals other than myself with JDA, I hereby provide consent on their behalf to the collection, use and disclosure of their personal information in terms of this personal information policy and I warrant that I am authorised to give this consent on their behalf.
- To this end, I indemnify and hold JDA not responsible in respect of any claims by any other person on whose behalf I have consented, against JDA should they claim that I was not so authorised.
- I understand that in terms of POPIA and other laws of the country, there are instances where my express consent is not necessary in order to permit the processing of personal information, which may be related to police investigations, litigation or when personal information is publicly available.
- I will not hold JDA responsible for any improper or unauthorised use of personal information that is beyond its reasonable control.

6. Rights regarding the processing of personal information:

- The individual may withdraw consent to the processing of personal information at any time, and should they wish to do so, must provide JDA with reasonable notice to this effect. Please note that withdrawal of consent is still subject to the terms and conditions of any contract that is in place. Should the withdrawal of consent result in the interference of legal obligations, then such withdrawal will only be effective if JDA agrees to same in writing. JDA specifically draws to the attention that the withdrawal of consent may result in it being unable to provide the requested information and/or services and/or financial or other benefits.
- In order to withdraw consent, please contact the JDA Information Officer/SCM
- A copy of the full JDA policy is available.
- Individuals are encouraged to ensure that where personal information has changed in any respect to notify JDA so that our records may be updated. JDA will largely rely on the individual to ensure that personal information is correct and accurate.

The individual has the right to access their personal information that JDA may have in its possession and are entitled to request the identity of which third parties have received and/or processed

JDA

personal information for the purpose. Please note however, that any request in this regard may be declined if:

- the information comes under legal privilege in the course of litigation,
- the disclosure of personal information in the form that it is processed may result in the disclosure of confidential or proprietary information,
- giving access may cause a third party to refuse to provide similar information to JDA,
- the information was collected in furtherance of an investigation or legal dispute, instituted or being contemplated,
- the information as it is disclosed may result in the disclosure of another person's information,
- the information contains an opinion about another person and that person has not consented, and/or
- the disclosure is prohibited by law.

7. Queries relating to breach of personal information:

- Please submit queries relating to the breach of personal information to the JDA's information officer and SCM in writing as soon as the breach is discovered.

Bidder Signature:	Date:
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