



City of  
Johannesburg  
Johannesburg  
Development Agency

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## INVITATION TO BID

### REQUEST FOR FORMAL WRITTEN PRICED QUOTATIONS

ADVERT DATE: 21 May 2021

CLOSING DATE: 28 May 2021

CLOSING TIME: 12H00

**BID DESCRIPTION: Johannesburg Development Agency's Executive Management and Board Strategic Planning Workshop**

BID 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 bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.**

**NB: NO BIDS 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  
Contact Person: Ms Claudia Mahlaule  
Tel: 011 688 7807  
Fax: 011 688 7899  
E-mail: [cmahlaule@jda.org.za](mailto:cmahlaule@jda.org.za)

**ANY REQUIRIES REGARDING TECHNICAL INFORMATION MAY BE DIRECTED TO:**

Department: **Company Secretary**  
Contact Person: Rodney Shirinda  
Tel: 011 688 7860  
Fax: 011 688 7899  
E-mail: [rshirinda@jda.org.za](mailto:rshirinda@jda.org.za)

**PLEASE NOTE: TENDERS MUST BE SUBMITTED ON THE TENDER DOCUMENTATION ISSUED. TENDER 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**

**OFFER**

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

**BID / RFP NUMBER**.....

**BID / RFP DESCRIPTION** .....

**NAME OF BIDDER**.....

**POSTAL ADDRESS**.....

**STREET ADDRESS**

**TELEPHONE NUMBER**            **CODE**..... **NUMBER** .....

**CELLPHONE NUMBER**

**FACSIMILE NUMBER**            **CODE**..... **NUMBER** .....

**VAT REGISTRATION NUMBER** .....

**CSD SUPPLIER NUMBER** .....

**COMPANY REGISTRATION NUMBER**.....

**TAX VERIFICATION PIN** .....

**TOTAL BID PRICE** excluding Value Added Tax

**TOTAL BID PRICE in words**

.....

..... **Excluding Value Added Tax**

.....

**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**

**The following conditions will apply:**

- A copy of a valid Tax Compliant Status Letter from SARS must be submitted.
- No award will be made to a bidder whose tax matters are not in order with the SARS.
- No award will be made to a bidder who is not registered with National Treasury's Central Supplier Database.
- An original and valid BBBEE status level verification certificate or a certified copy thereof must be submitted.
- **An EME must submit an affidavit confirming the following:**
  - **Annual turnover revenue of R10 million or less; and**
  - **Level of black ownership**

**Any misrepresentations in terms of the above constitutes a criminal offence as set out in the B-BBEE Act as amended.**

- A copy of the bidder's current municipal account in the name of the bidder or alternatively in the names of the directors / partners of the bidding entity must be submitted.
- Price(s) quoted must be valid for at least thirty (30) days from date of your offer.
- Price(s) quoted must be firm and must be exclusive of VAT.
- If the price quoted is above R 30 000 (inclusive of VAT), the quotation will be evaluated in terms of the 80/20 preference point system as prescribed in the Preferential Procurement Framework Act (No. 5 of 2000).

**Failure to comply with these conditions may invalidate your offer.**

**To all our stakeholders**

**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 which is managed by independent service providers.

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 002 587
- Toll free Fax..... 0800 007 788
- SMS (charged @ R1.50) ..... 32840
- Email Address: [anticorruption@tip-offs.com](mailto:anticorruption@tip-offs.com)
- Web site: [www.tip-off.com](http://www.tip-off.com)
- Free post: Free post, KNZ 138, Umhlanga, 4320



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

# REQUEST FOR FORMAL WRITTEN PRICE QUOTATIONS FOR THE EXECUTIVE MANAGEMENT AND BOARD STRATEGIC PLANNING WORKSHOP FACILICATION SERVICES

## 1. INTRODUCTION

The Johannesburg Development Agency (JDA) hereby invites quotations from service providers for the Facilitation Services for the Executive Management and Board Strategic Planning Workshop.

There is no compulsory clarification meeting for this Request for Quotation.

All queries in connection with this document are to be submitted in writing to:

Claudia Mahlaule - email {SCM queries} : [cmahlaule@jda.org.za](mailto:cmahlaule@jda.org.za)

Rodney Shirinda – email {Company Secretary queries} : [rshirinda@jda.org.za](mailto:rshirinda@jda.org.za)

## 2. SCOPE OF WORK

2.1 The scope of work will include but not limited to the following:

### Facilitation Services as follows:

- A full day Executive Management Strategy Planning to be held on **08 June 2021**
- A two day Board Strategy Planning Workshop to be held on **14 and 15 June 2021**

## 3. RESOURCE REQUIREMENTS

3.1 Bidders are required to propose the resource required to undertake facilitation works

3.2 The CV of individual to be presented on the proposal should be consistently allocated to the assignment until finalization of a project(s). Any changes or substitutions should be approved by the JDA Company Secretary.

3.3 Bidders are also required to provide a high-level project plan.

## 4. APPROACH AND METHODOLOGY

4.1 Service provider(s) are required to propose a methodology for the services.

## 5. REGISTRATION WITH PROFESSIONAL BODIES

5.1 All team members on these projects must be registered members of relevant professional body suitable for the works

## 6. REPORTING AND PROGRESS MEETINGS

6.1 It is envisaged that the JDA Company Secretary and CEO will require an initial meeting with the successful bidder to agree on the project process.

6.2 A final report will be required and presented to the Company Secretary, EXCO and the Board.

## 7. PROJECT TIMEFRAMES

7.1 The projects are scheduled to be executed on the following dates:

- a) **08 June 2021** full day for Executive Management Strategic Planning Workshop
- b) **14 and 15 June 2021** two-day Board Strategic Planning Workshop

## 8. DURATION

8.1 The duration of the appointment period will be as follows:

- a) **08 June 2021** for Executive Management Strategic Planning Workshop
- b) **14 and 15 June 2021** for the Board Strategic Planning Workshop

## 9. PRICING

9.1 The total fee must be carried to the **“Offer” page**. Failure to complete the “Offer” page as required will result in the tender being disqualified for non-compliance.

## 10. Notes

- 10.1 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 tendered amount to render services for all activities. Failing to price as required will result in the tender being disqualified.
- 10.2 Fees **must** include standard disbursements such as typing, reproduction, copying, binding of documents, telephonic / electronic and facsimile communications, courier, local travel and accommodation, etc.
- 10.3 Bidders **must** complete an offer page. Bidders who do not comply with this will be disqualified.
- 10.4 The name of the project should be clearly marked on the proposal.
- 10.5 Service providers are required to ensure that they have adequate resources to undertake the facilitation services work under stringent timeframes.
- 10.6 The JDA reserves the right to request service providers to replace any member/s of the proposed team if they do not meet the JDA facilitation services requirements.

## 11. PRESENTATION OF QUOTATIONS

The following minimum documentation must be provided.

- 11.1 **THE “OFFER” PAGE MUST BE COMPLETED IN FULL AND SIGNED. Any service provider who fails to do so will be disqualified.**
- 11.2 **Service provider are required to submit a detailed fee proposal based on the requirements set out in item 2 above and to ensure that the final TOTAL FEE IS CORRECTLY TRANSFERRED TO THE “OFFER” PAGE. Any bidder who fails to do so will be disqualified.**
- 11.3 Methodology indicating how the project will be executed.
- 11.4 Provide comprehensive information on the individuals who will be assigned to **this project (NOT the entire company)**.
- 11.5 The following **must** be addressed:
  - > Role/s and responsibilities in this project.
  - > Relevant qualifications.
  - > Number of years' experience performing similar projects.
  - > A percentage estimate of the time planned to be dedicated to this project by each person.

- > Detailed CVs for each member of the team noting their specific relevant project experience [project description, role and responsibilities, project value].
  - > Everyone assigned to a project should be a current member of a professional body. Proof to be submitted accordingly.
- 11.6 A schedule of completed contracts of a similar nature to this project. The following details must be included on the schedule:**
- > Description of the project
  - > Service rendered
  - > Name of employer / client and their representative's contact details
  
  - > Fee obtained for services
  - > Date of completion
- 11.7** Project Plan and estimated number of hours required to complete the project.
- 11.8** Service providers are required to submit valid Tax pin issued by SARS.
- 11.9** A copy of the bidding entity's current municipal rates account in the name of the bidding entity or alternatively in the names of the directors / partners of the bidding entity.
- 11.10** The Annexures **A to E** must be scrutinized, completed in full and submitted together with the quotation.

**Failure to comply with the requirements in item 13 will result in service providers being negatively scored for responsiveness or disqualified for non-compliance.**

## **12. ASSESSMENT CRITERIA**

Submissions will be evaluated on the criteria to follow

- Compliance; and
- Technical Assessment
- Price / BBBEE

### **12.1 Compliance**

**Bidders will be disqualified in the following instances;**

- 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;
- Bidders who did not complete, in full, the tender offer page and signed;
- Bidders whose tender document has been completed in pencil;
- Bidders whose document has been faxed;
- Bidders whose tender document has been received after the closing time;
- Bidders whose tender document has not been deposited in the tender box at the time of closing;
- Bidders who have any directors in the employment of the state.
- No award will be made to any bidder whose tax matters are not in order with the receiver of revenue (SARS);
- No award will be made to any bidder who is not registered on the National Treasury Central Supplier Database (CSD);

**12.2 Technical Assessment /Evaluation criteria**

The technical assessment is based on the criteria set out below namely (i) key returnable documents, (ii) capability of the proposed key team members (i.e., experience, qualifications, and memberships to professional associations per Item 8.1 above) and (iii) the experience of the company (i.e., Facilitation services works, and references

Note that duplication of resources/personnel on the designations indicated in the criteria will result in zero points being awarded for one criteria.

Tenderers will have to submit compliant documents and score a minimum number of points in the technical evaluation in order to be considered further in the evaluation process.

Service providers require a minimum of 217 points [out of a possible 310] that is 70%

The responsiveness criteria will be assessed on as per the table below for all the disciplines.

**Functional Criteria**

Only those Bidders that score 217 points or higher (out of a possible 310) during the functional evaluation will be evaluated during the second stage of the Bid. Bidders are required to submit supporting documentation evidencing their compliance with each requirement.

The Functional Criteria that will be used to test the capability of Bidders are as follows

	Total Points	Criteria	Description of Criteria	Points
<b>A Project specific approach and Methodology</b>	0	Points will be allocated for including the following:	<b>No Point will be allocated for these criteria</b>	
		Company profile		0
		Detailed methodology for the project per stage		0
				0
				0
<b>B Capability of proposed key personnel per item 6.13</b>	<b>Total points under section B (B1 + B2) capability is. 240 points</b>  120	<b>Team Leader:</b> The Project director must have a minimum of 6 years of experience in facilitation works at Strategic Level /Executive Management and Board	<b>If any of the following information is not provided, zero points will be awarded:</b> <ul style="list-style-type: none"> <li>Detailed CV of the project team director.</li> <li>The project team leader track record</li> <li>Contactable references</li> </ul>	<b>50</b>



	Total Points	Criteria	Description of Criteria	Points
<p><b>B1</b> Detailed CVs indicating track record of proposed key team members are required</p>		<p><b>Supervisory Level Team Member</b></p> <p>The team supervisor must have a minimum of 4 years of experience in facilitation works at Strategic Level /Executive Management and Board</p>	<p><b>If any of the following information is not provided, zero points will be awarded:</b></p> <ul style="list-style-type: none"> <li>Detailed CV of the project team director.</li> <li>The project team supervisor track record</li> <li>Contactable references</li> </ul>	<p><b>40</b></p>
		<p><b>Junior Level Team Member</b></p> <p>The junior level team member on the project must have a minimum of 2 years of experience in facilitation works at Strategic/Executive Management and Board Level</p>	<p><b>If any of the following information is not provided, zero points will be awarded:</b></p> <ul style="list-style-type: none"> <li>Detailed CV of the project team director.</li> <li>The project team junior member track record</li> <li>Contactable references</li> </ul>	<p><b>30</b></p>
<p><b>B2</b> Copies of qualification and registration to relevant professional bodies are required for the proposed key personnel</p>	<p><b>120</b> <b>Audit Team</b></p>	<p><b>Project Team Leader:</b></p> <p>Must have Bachelor's Degree</p>	<p><b>If any of the following information is not provided, zero points will be awarded:</b></p> <ul style="list-style-type: none"> <li>The required qualification</li> <li>The relevant qualification</li> <li>Professional membership</li> </ul>	<p><b>50</b></p>
		<p><b>Supervisory Level Team Member</b></p> <p>Must have relevant qualifications Bachelor's Degree</p>	<p><b>If any of the following information is not provided, zero points will be awarded:</b></p> <ul style="list-style-type: none"> <li>The required qualification</li> <li>The relevant qualification</li> <li>Professional membership</li> </ul>	<p><b>40</b></p>
		<p><b>Junior Level Team Member</b></p> <p>Must have relevant qualifications Bachelor's Degree</p>	<p><b>If any of the following information is not provided, zero points will be awarded:</b></p> <ul style="list-style-type: none"> <li>The required qualification</li> <li>The relevant qualification</li> </ul>	<p><b>30</b></p>

	Total Points	Criteria	Description of Criteria	Points
			<ul style="list-style-type: none"> <li>Professional membership</li> </ul>	
<p><b>C</b></p> <p><b>Company experiences as per item 6.13</b></p> <p>C1 Experience on similar IT projects</p>	<p><b>40</b></p> <p><b>Completed relevant project with contactable references</b></p>	8 or more works in the Facilitation at the Executive/and Board level conducted previously.	<p><b>If any of the following information is not provided, zero points will be awarded:</b></p> <ul style="list-style-type: none"> <li>List of projects</li> <li>Supporting contactable reference with the letter head of the organisation.</li> </ul>	<b>40</b>
		Four or more Facilitation Services previously conducted at Executive/and Board Level		<b>35</b>
		Two or more Facilitation Services Facilitation Services previously conducted at Executive/and Board Level		<b>30</b>
		One Facilitation Service Facilitation Service previously conducted at Executive/and Board Level		<b>25</b>
<p>C2 Contactable references on experience</p>	<p><b>30</b></p>	Six or more Facilitation Services previously conducted at Executive/and Board Level	<p><b>If any of the following information is not provided, zero points will be awarded:</b></p> <ul style="list-style-type: none"> <li>List of projects</li> <li>Supporting contactable reference with the letter head of the organisation.</li> <li>Reference letters must be of the projects listed as per C1 above</li> </ul>	<b>30</b>
		Four or more satisfactory references on Facilitation Services previously conducted at Executive/and Board Level		<b>20</b>
		Two or more satisfactory references on Facilitation Services previously conducted at Executive/and Board Level		<b>15</b>
		One satisfactory references on Facilitation Services previously conducted at Executive/and Board Level		<b>10</b>

**13. Price and Empowerment**

Having completed a technical evaluation, the next stage for the evaluation of technically qualifying quotations is Price and Preferences. The Preference Point System assigns a score to each service provider based on the quotation price and on the service provider’s BBBEE status. These scores are combined to determine an overall score for the service provider. The quotation with the highest score will be considered for acceptance.

13.1 The Preference Point System will be applied as follows:

- 80 points are assigned to price
- Up to 20 points are assigned to BBBEE status per the table under item
- Points scored will be rounded off to the nearest 2 decimal places

13.2 Points awarded for BBBEE status level

Points will be awarded for empowerment (BBBEE), in accordance with the Preferential Procurement Regulations 2011 published in Government Gazette No. 34350 dated 8 June 2011. The table overleaf is applicable in this regard:

B-BBEE Status Level Of Contributor	Number of Points
	Tenders up to R50 million
<b>1</b>	<b>20</b>
<b>2</b>	<b>18</b>
<b>3</b>	<b>14</b>
<b>4</b>	<b>12</b>
<b>5</b>	<b>8</b>
<b>6</b>	<b>6</b>
<b>7</b>	<b>4</b>
<b>8</b>	<b>2</b>
<b>Non-Compliant contributor</b>	<b>0</b>

Notes:

1. “B-BBEE status level of contributor” means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act (Act No.53 of 2003).

2. A certified copy of a valid BBBEE status level verification certificate, 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.
3. An EME must submit a sworn affidavit confirming the following:
  - Annual Turnover Revenue of R10 million or less; and
  - Level of Black ownership

Any misrepresentation in terms of above constitutes a criminal offence as set out in the B-BBEE Act as amended

4. Bidders with annual total revenue of R5 million or less qualify as Exempted and must submit a certificate issued by a Registered auditor, accounting officer or an accredited verification agency.
  5. The submission of such certificates must comply with the requirements of instructions and guidelines issued by the National Treasury and be in accordance with notices published by the Department of Trade and Industry in the Government Gazette.
  6. ANY SUBMISSION OF A SWORN AFFIDAVIT BY A QSE WILL RESULT IN THE A SCORE OF ZERO POINTS
  7. A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
  8. A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate tender.
  9. A person will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for.
10. A person awarded a contract will not be permitted to sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned.

**14. CLOSING DATE, TIME AND VENUE FOR SUBMISSIONS**

The words **JDA EXECUTIVE MANAGEMENT AND BOARD STRATEGIC PLANNING WORKSHOP FACILITATION SERVICES** 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 President Street, Newtown** by 12H00 on the 28 May 2021.

**The invitation for quotations closes at 12h00 on 28 May 2021**

**NO LATE / TELEPHONIC / FAXED / POSTAL TENDERS WILL BE ACCEPTED OR CONSIDERED.**

The Johannesburg Development Agency's selection of qualifying quotations 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 particular quotation and no correspondence will be entered into.

Queries can be addressed in writing to:

Rodney Shirinda [E-mail: rshirida@jda.org.za](mailto:rshirida@jda.org.za) and Claudia Mahlaule on [cmahlaule@jda.org.za](mailto:cmahlaule@jda.org.za)

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**ANNEXURE A: BUSINESS DECLARATION**

**Tender/RFP Number:** .....

Tender/RFP 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 .....



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


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

REQUEST FOR QUOTATIONS: Executive Management and Board Strategy es

**10. Banking details**

I/We hereby request and authorise 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 authorised 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** : .....

**The undersigned, who warrants that he/she is duly authorized 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** :  
.....

**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

.....

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

.....

.....

.....

.....

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

FULL NAME	IDENTITY NUMBER	STATE EMPLOYEE NUMBER

**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. willfully 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? <b>(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).</b>	Yes	No
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)? <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>	Yes	No
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	No
4.3.1	If so, furnish particulars:		
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	No
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	No
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 E: PARTICULARS OF COMPLETED SIMILAR PROJECTS**

EMPLOYER	CONTACT DETAILS	NATURE OF WORK

**\*\*\* 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

Position.....

.....

Name of Bidder

Date

.....

*(of person authorised to sign on behalf of the organisation)*

**ity of Johannesburg**  
Johannesburg  
Development Agency

No 3 Helen Joseph Street  
The Bus Factory Newtown  
Johannesburg, 2000

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[www.joburg.org.za](http://www.joburg.org.za)

## **ANNEXURE E: CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

### **Executive Management and Board Strategic Planning Workshop 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:

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 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.
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 H : 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:

.....  
.....  
.

---

**1. Signature**

---

**Date**