

SBD1

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)					
BID NUMBER:	Q8476/2022	CLOSING DATE:	13 October 2022	CLOSING TIME:	11:00
DESCRIPTION	SANBI REQUIRES A SERVICE PROVIDER PROPOSAL AND QUOTATION FOR INDIVIDUAL AND TEAM DEVELOPMENT FOR SENIOR MANAGERS				
Submission of proposals: proposals must be emailed to S.SCM-Quotations@sanbi.org.za with a copy to Ms. Masowa at M.Masowa@sanbi.org.za Please state the Bid number as the reference number on the subject line when responding to the RFQ					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Mapula Masowa		CONTACT PERSON	Maano	
TELEPHONE NUMBER	(012)843-5075		TELEPHONE NUMBER	(012) 843-5295/0824530497	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	M.Masowa@sanbi.org.za		E-MAIL ADDRESS	m.netshiombo@sanbi.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		TICK APPLICABLE BOX] ☐ Yes ☐ No
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				☐ YES ☐ NO	

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

**PART B
TERMS AND CONDITIONS FOR BIDDING**

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

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

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state?

YES/NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read, and I understand the contents of this disclosure.

3.2I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.

3.3 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 consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements, or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements, or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 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.

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	
Signature	Date
.....	
Position	Name of bidder

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL
PROCUREMENT REGULATIONS 2017**

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

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

1.2

- a) The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable: or
- b) The 80/20 preference point system will be applicable to this tender.

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

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

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

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

- 5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: =(maximum of 10 or 20 points)

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

7. SUB-CONTRACTING

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

(Tick applicable box)

YES	☐	NO	☐
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- 7.1.1 If yes, indicate:

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

(Tick applicable box)

YES		NO	
-----	--	----	--

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

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

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name _____ of
company/firm.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
☐ One person business/sole propriety
☐ Close corporation
☐ Company
☐ (Pty) Limited
 [TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

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

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

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificates, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct.
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct.
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process.
 - (b) recover costs, losses, or damages it has incurred or suffered because of that person's conduct.
 - (c) cancel the contract and claim any damages which it has suffered because of having to make less favourable arrangements due to such cancellation.
 - (d) recommend that the bidder or contractor, its shareholders, and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

WITNESSES

1.
2.

.....
 SIGNATURE(S) OF BIDDERS(S)

DATE:

ADDRESS

.....

.....

**Terms of Reference/ Request for Proposal and Quotation
for
Individual and team development for senior managers**

Quotation number:Q8476/2022

The South African National Biodiversity Institute (SANBI) seeks to appoint a suitably qualified service provider to facilitate team and individual development sessions for senior managers.

1. Introduction and Background

SANBI's mandate comes from the National Environmental Management Biodiversity (NEMBA) Act No. 10 of 2004. The mandate is to explore, reveal, celebrate and champion biodiversity for the benefit and enjoyment of all South Africans, which includes managing the National Botanical and Zoological Gardens as 'windows' to South Africa's biodiversity for enjoyment and education.

SANBI is a public entity in terms of section 38(1) (m) of the Public Finance Management Act and is classified as a schedule 3A entity. i.e. one that will receive substantial support from the National Revenue Fund.

SANBI adopted most of the conditions of service of the public service, including the Department of Public Service and Administration (DPSA) Senior Management Service (SMS) Competency Framework. In developing the SMS Competency Framework focus was placed on critical generic competencies, which senior managers would be expected to possess, rather than functional/technical competencies, which are essential to a specific department or a specific job. The SMS Competency Framework consists of a set of the following eleven (11) generic competencies that ensures that Senior Managers have the requisite competencies and associated proficiency levels to succeed at strategic level.

- (a) Strategic Capability and Leadership
- (b) Programme and Project Management
- (c) Financial Management
- (d) Change Management
- (e) Knowledge Management
- (f) Service Delivery Innovation (SDI)
- (g) Problem Solving and Analysis
- (h) People Management and Empowerment
- (i) Client Orientation and Customer Focus
- (j) Communication
- (k) Honesty and Integrity.

In addition, the SANBI senior management team also added the following competencies

- Decision-making
- Innovation
- Systems thinking
- Building and maintaining relationships
- Social and cultural intelligence

- Influence

These terms of reference seek to invite prospective service providers to submit quotations to develop and facilitate:

- a) team sessions (ideally this should be a blended approach, preferably online to ensure cost effectiveness) for 38 senior managers in the following competencies: Strategic thinking, Decision-making, Problem solving and Systems thinking;
- b) individual sessions (ideally this should be a blended approach or online to ensure cost effectiveness) for 38 senior managers in those competencies identified for further development (a matrix will be provided upon request). Where there will be critical mass of similar individual development needs, team development sessions may be held online to ensure cost effectiveness.

The quotation should also make provision for a comprehensive report on the return on the learning investment, which will be required within 3 – 4 months after implementation of the above sessions.

2. Scope of work

Phase 1: Delivery of team sessions for 38 senior managers between February 2023 and August 2023.

Phase 2: Delivery of individual sessions for 38 senior managers between February 2024 and November 2024.

Phase 3: An evaluation of the return on the learning investment in March 2025, followed by the submission of a comprehensive report.

3. Requirements

SANBI requires a service provider with extensive experience in leadership and managerial development. Delivery options should include individual and team coaching. Sessions can be facilitated either in person or via online platforms.

4. Functionality evaluation criteria

In accordance with the National Treasury Instruction Note on the amended Guidelines in respect of proposals that includes functionality as a criterion for evaluation (issued 3 September 2010), the proposals will be evaluated in two stages:

Stage 1 will evaluate functionality according to the criteria listed in the table below:

Criteria for measuring Functionality	Weight
1. Company profile, which includes brief descriptions of the products and services and clients that have been serviced in the last five (5) years	10
- Profile that includes best practice brief descriptions of the products and services and clients serviced in the last five (5) years. - Profile that includes more than acceptable brief descriptions of the products and services and clients serviced in the last five (5) years. - Profile that includes acceptable brief descriptions of the products and services and clients serviced in the last five (5) years. - Profile that includes unacceptable brief descriptions of the products and services and clients serviced in the last five (5) years. - No profile that has brief descriptions of the products and services and clients serviced in the last five (5) years.	Scales • 5 • 4 • 3 • 2 • 1
2. Three signed letters of reference which must include summary for work study assignments done in the last five (5) years.	20
- Three signed letters of reference with the best practice summary for work study assignments done in the last five (5) years. - Three signed letters of reference with more than acceptable summary for work study assignments done in the last five (5) years. - Three signed letters of reference with acceptable summary for work study assignments done in the last five (5) years. - Three signed letters of reference with unacceptable summary for work study assignments done in the last five (5) years. - No three signed letters of reference with summary for work study assignments done in the last five (5) years.	Scales • 5 • 4 • 3 • 2 • 1
3. Indicate capacity and relevant experience of key personnel who will be working on this project. Submit their individual three (3) paged Curriculum Vitae (CV)	20
- Best practice evidence of capacity and relevant experience of key personnel who will be working on the project as per Curriculum Vitae (CV). - More than acceptable evidence of capacity and relevant experience of key personnel who will be working on the project as per Curriculum Vitae (CV). - Acceptable evidence of capacity and relevant experience of key personnel who will be working on the project as per Curriculum Vitae (CV). - Unacceptable evidence of capacity and relevant experience of key personnel who will be working on the project as per Curriculum Vitae (CV). - No evidence of capacity and relevant experience of key personnel who will be working on the project as per Curriculum Vitae (CV).	Scales • 5 • 4 • 3 • 2 • 1
4. A concise written summary of no more than five (5) pages that demonstrates the methodology and approach to be used for this project.	50
- Summary that demonstrates the best practice methodology and approach to be used for the project. - Summary that demonstrates more than acceptable methodology and approach to be used for the project. - Summary that demonstrates acceptable methodology and approach to be used for the project. - Summary that demonstrates unacceptable methodology and approach to be used for the project. - No summary that demonstrates methodology and approach to be used for the project.	Scales • 5 • 4 • 3 • 2 • 1

TOTAL	100
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70 out of a possible 100 points for functionality will not be eligible for further consideration.

Stage 2 will evaluate the price and preferential points of those proposals that meet the minimum threshold for functionality. The second stage will evaluate the price and preference points of those bids that meet the minimum threshold for functionality. In accordance with the Preferential Procurement Regulations, 2017 pertaining to the Preferential Procurement Policy Framework Act (No. 5 of 2000), the 80/20-point system will be applied in evaluating proposals that qualify for further consideration, where price constitutes 80 points and a maximum of 20 points will be awarded based on the bidder's B-BBEE Status Level Certificate submitted with the proposal. Failure to submit such certificate will not necessarily result in the proposal being disqualified, but no points will be awarded for B-BBEE status.

5. Service agreement arrangements

- The team and individual sessions should be facilitated on dates agreed beforehand, suitable to both the service provider and SANBI senior managers.
- Venues can be provided by SANBI for on-site sessions.
- Invoices will be paid on completion of each phase.
- Invoices for all workshops must be accompanied by detailed reports.

6. Mandatory Requirements

- A copy of the company Central Supplier Database (CSD) registration report
- A certified BBBEE certificate or BBE Sworn affidavit
- Complete all SBD forms 1, 4, 6.1

7. Proposal submission

Enquiries and requests for further information to these ToR must be emailed to Mr Maano Netshiombo m.netshiombo@sanbi.org.za

8.Submission

Submission Deadline:

Closing date for submission of responses: 13 October 2022 at 11h00

Submission of proposals must be emailed to S.SCM-Quotations@sanbi.org.za with a copy to Ms. Masowa at M.Masowa@sanbi.org.za

Emailed applications must not be more than 6MB in size.

For more information about the Terms of Reference, please contact Mr. M Netshiombo at m.netshiombo@sanbi.org.za