

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)							
BID NUMBER:	Q11339	CLOSING DATE:	14 March 2025	CLOSING TIME:	11h00		
DESCRIPTION	SANBI REQUIRES SERVICE PROVIDER TO SUPPORT THE TRAINING AND OUTREACH EVENTS AND ACTIVITIES FOR THE SANBI-GBIF NODE.						
	<u>When responding to the RFQ, please state the Bid number as the reference number on the subject line.</u>						
Submission of proposals: proposals must be emailed to S.SCM-Quotations@sanbi.org.za <b style="color: red;">Failure to send to the above email address will result in your bid being disqualified. 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	Cloudy Masilane			CONTACT PERSON	FATIMA PARKER		
TELEPHONE NUMBER				TELEPHONE NUMBER	0217998769		
FACSIMILE NUMBER	N/A			FACSIMILE NUMBER	N/A		
E-MAIL ADDRESS	M.cloudy@sanbi.org.za			E-MAIL ADDRESS	F.Parker@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]		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX]		
	☐ Yes ☐ No				☐ Yes ☐ No		
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]							
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**

2.2.1 If so, furnish particulars:

.....

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.

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- 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;
- 3.2 I 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.
- 3.4 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.
- 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

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.

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.

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 2022

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

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

1. GENERAL CONDITIONS

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

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

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) The **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.
- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) \text{ or } P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) \quad \text{or} \quad P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated	Number of points claimed (80/20 system)
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	(80/20 system) (To be completed by the organ of state)	(To be completed by the tenderer)
1. Categories of persons historically disadvantaged by unfair discrimination on the basis of race. 100% black ownership (Points will be allocated based on the percentage of ownership per goal. Information will be verified on CSD. CSD must be attached as proof)	5	
2. Categories of persons historically disadvantaged by unfair discrimination on the basis of gender. 100 % female ownership (Points will be allocated based on the percentage of ownership per goal verified on CSD. CSD must be attached as proof)	10	
3. Categories of persons historically disadvantaged by unfair discrimination on the basis of disability. 100 % disability ownership (Points will be allocated based on the percentage of ownership per goal. Information will be verified on CSD. CSD must be attached as proof)	5	
TOTAL	20	

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender,

qualifies the company/ firm for the preference(s) shown and I acknowledge that:

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

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	

Terms of Reference:

Support for the appointment of a coordinator for training and outreach events hosted by Foundational Biodiversity Science (FBS) & Strategic Projects including the SANBI-GBIF Node

Quotation no:Q11339/2025

Closing date:14 March 2025

1. Background

SANBI-GBIF is the South African node of the Global Biodiversity Information Facility (GBIF), established and funded by the Department of Science and Innovation (DSI), and hosted by SANBI. The efforts of SANBI-GBIF are guided by several key strategic objectives, this includes: 1. Promoting the sharing of data and information under a common set of standards 2. Contributing to education, training, and capacity development for promoting national access to data 3. Advising on national and international initiatives 4. Facilitating marketing and awareness raising of the benefits and applications for end users

One of SANBI-GBIF's key roles is to mobilize biodiversity information and make it freely available on the internet. Currently more than 30 000 000 biodiversity data records have been mobilized through the South African GBIF Node partners. This is important to ensure that researchers, conservation planners and decision-makers can use the information to make informed decisions that contribute to South Africa's sustainable development. It is critical that core skills are developed to further mobilise, manage and use this biodiversity data for research and effective decision-making.

For the FBS Strategic Initiatives, a series of conferences and training events will contribute to the development of skills in biodiversity informatics and to growing participants' understanding of the value and use of the biodiversity data.

These workshops and training events provide an opportunity for knowledge sharing, networking and learning to take place. They attract a wide range of stakeholders from government, the private sector, civil society and the academic sector to share lessons and experiences of projects and initiatives across the country. Also, to discuss aspects of data sharing.

In the event of a conference, this will generally include approximately 100-150 participants and will be held over a period of 3-5 days depending on the nature of the event. Each training event will attract between 20 – 30 people and be held over a period of 4-5 days depending also on the nature of the event. The format of conference is specific but could include formal presentations in plenary and parallel, breakaway discussion sessions, site visits, and exhibition sessions. For some of the conferences and training events accommodation is also arranged. The training and engagement events may range from small groups of less than ten, to larger stakeholder groups.

2. Objectives of the work

SANBI requires a service provider to support the coordination of training and outreach activities including **seminars/conferences/workshops/events** during 2025 and 2026 within the Division: Foundational Biodiversity Science.

3. Requirements of the service provider

The successful service provider will be responsible for the following activities:

a. Convening of conferences and training events

For each conference or training events hosted the following will be required, where relevant:

- **General** – the service provider may be required to support the project management team for each event with procurement through SANBI's systems and using SANBI's suppliers database e.g. for catering, venue hire, printing etc. however the costs of these services will be for SANBI's account and should **NOT** be included in the proposal.
- **Invites** – the service provider will be responsible for managing the invitation process including sending out invitations; follow up on invitations sent; keeping track of RSVPs including special requirements e.g. dietary; collating registration forms from participants and receiving abstracts if relevant. The service provider will be required to handle communication and liaison with participants before and after the event, being the main point of contact for enquiries. The service provider will be required to coordinate accommodation bookings for those conferences and training events where this is required and coordinate accommodation, flights and transport arrangement for speakers and participants if and as required.
- **Registration** – the service provider will be responsible for managing the registration process including the generation and printing of name badges, registration lists, evaluation form and providing a conference secretariat at the event. The service provider must provide a full attendance register after the event. The service provider may be required to assist with printing of programmes and other conference documents (cost

of printing will be for SANBI's account and should not be included in the proposal) as well as arrange and put together information packs if required.

- **Audio-visual logistics** – the service provider will be responsible for the coordination of audio-visual equipment (as needed and venue dependent) including projectors, laptops, screens, pointers, microphones etc. This will also include the sound set-up in the venue; collecting presentations in PPT format from speakers and ensuring these are loaded before the presentation time; ensuring speakers are willing for presentations to be loaded onto a website; PDF'ing presentations for loading onto a website after the event; and any additional requirements as needed e.g. lighting.
- **Venue and room setup** – the service provider may be required to assist with finding a suitable venue for some of the conferences and training events (costs of securing the venue will be for SANBI's account and should not be included in the proposal). The service provider will be responsible for venue liaison; room setup and design, including ensuring suitable area for poster display if necessary; hiring of any additional equipment, flowers and other display arrangements if required (cost for SANBI's account and should not be included in the proposal); and clear up and break-down of venue following the event. The service provider will be required to coordinate security and parking arrangements; develop directional and parking signage; and coordinate VIPs attending the Forum or learning exchange.
- **Online Support** – the service provider will support and maintain platforms for online meetings if required. Eg., Zoom.
- **Catering** – the service provider will be responsible for the hiring of caterers (if necessary but this could be venue dependent), choosing menus, dealing with participants special needs, caterer liaison, etc. Provision needs to be made for lunch and teas for the event days. Catering costs will be for SANBI's account and should not be included in the proposal.
- **Travel** – The service provider will be required on site and should therefore be willing to travel both at national and regional level, depending on where the conference or event will be held.
- **Debriefing** – the service provider will be required to participate in a debriefing with the client after the forum or learning exchange.

4. Skills and competency required

In order to fulfil this role, the service provider should have demonstrable skills and experience in the following:

- Project coordination / management or similar area of work
- Conference/forum/learning exchange coordination showing excellent organisational ability and competencies
- Knowledge-based communities of practices, preferably in the biodiversity sector/environmental/museums or natural history collections /developmental sector
- Budget management and an ability to work within tight budgets
- Coordination of conferences, forums, and training events

In addition, the service provider must:

- Have excellent interpersonal skills and work well with a team
- Be self-motivated and results driven with a strong ability to problem solve and trouble-shoot
- Can work independently and deliver efficiently on high quality deliverables within tight timeframes
- Have computer skills and be proficiency with MS Office
- Be willing to travel nationally as required
- Be able to meet regularly at the Kirstenbosch offices as required

The response to the terms of reference should indicate the extent to which the service provider fulfills these requirements. Preference is to appoint an individual (either an independent consultant or an individual seconded from a company) and not a big team. Proposals should include the CV and references for the individual who will do the work.

5. Budget

- Provide a detailed and complete budget for the proposed work, including:
- Professional fees (number of days and rate per day) and VAT separately if applicable. This should include the service provider's time, as well as the following overheads (own office, consumables, computers, telephony and data, as well as travel with own vehicle within 100km, etc).
- Subsistence and travel disbursements should NOT be included in the budget. These costs will be covered by SANBI directly, or may be claimed separately subject to prior approval by SANBI. All S&T, Travel and accommodation costs will be subject to SANBI policies and rates.

6. Requirements for proposals and evaluation criteria

Interested service providers should submit a concise written proposal that addresses the scope of work and the above requirements.

The proposal must include:

- Details of the service provider, including relevant skills, experience and track record in both activities under section 3 above.
- A brief description of approach and key steps.
- Example of an event plan for a forum: Cape Town based forum to be held at a SANBI venue over a 3-day period for 100 people. Please include an example of a budget for activities and key steps.
- A budget proposal indicating only the applicable hourly or daily rate that will be charged for the work. It is expected that the hourly rate includes all regular consulting overheads (e.g. local travel, telephone expenses, etc.) but excludes required travel to the specific conferences and training events. Such travel costs will be covered separately, outside of this contract and should not be costed into the proposal. Fees, disbursements and VAT should be shown separately.
- Please note that this budget proposal will only be evaluated on the basis of the hourly or daily rate. A complete budget for the scope of work will be agreed between SANBI and the service provider based on the specifications of each forum or learning exchange once these have been confirmed and finalized.
- Details of any contribution to empowerment of historically disadvantaged individuals (HDI) and/or transformation of the sector.
- Equity status of service provider (BBBEE scorecard of good practice) according to the attached form (SBD 6.1).
- Contact details of at least three current or recent clients.

Functionality evaluation criteria (Please note that this BID will be evaluated on Functionality).**

Evaluation of proposals will be done according to the following criteria (so sufficient information should be provided):

Criteria for measuring functionality	Weight**
1. Tertiary qualification in Project Management / Coordination or similar	20
2. Years of past experience in relation to the scope of work	20
3. Demonstrated experience and Competencies of service provider and responsible individual/s (specific reference must be made to competencies listed in section 4 above)	20
4. Technical merit of proposal (approach and event plan highlighting key steps, timeframes)	40

Criteria and Sub-Criteria for measuring functionality													
1. Qualifications Level of expertise and qualifications – include detailed copy of CV and qualifications of the service provider who is going to be working on this project. Please include a minimum of 3 contactable references in the CV. Academic Qualifications <table> <tr> <th>Sub-criteria</th><th>Points obtainable</th></tr> <tr> <td>A postgraduate diploma in project management or coordination qualification or similar</td><td>8</td></tr> <tr> <td>Degree / B-Tech qualification in project management / coordination qualification or similar</td><td>7</td></tr> <tr> <td>Diploma (Advanced Certificate) in project management / coordination qualification or similar</td><td>5</td></tr> <tr> <td></td><td></td></tr> <tr> <td>Total</td><td>20</td></tr> </table>	Sub-criteria	Points obtainable	A postgraduate diploma in project management or coordination qualification or similar	8	Degree / B-Tech qualification in project management / coordination qualification or similar	7	Diploma (Advanced Certificate) in project management / coordination qualification or similar	5			Total	20	20
Sub-criteria	Points obtainable												
A postgraduate diploma in project management or coordination qualification or similar	8												
Degree / B-Tech qualification in project management / coordination qualification or similar	7												
Diploma (Advanced Certificate) in project management / coordination qualification or similar	5												
Total	20												
2. Relevant Years of Past Work Experience of Service Provider in Relation to The Scope Of Work <table> <tr> <th>Sub-criteria</th><th>Points obtainable</th></tr> <tr> <td>More than 9 years relevant experience in relation to similar projects</td><td>7</td></tr> <tr> <td>Between five (5) – six (6) years relevant experience in relation to similar projects</td><td>6</td></tr> <tr> <td>Between four (4) – five (5) years relevant experience in relation to similar projects</td><td>5</td></tr> <tr> <td>Three (3) – four (4) years relevant experience in relation to similar projects</td><td>2</td></tr> <tr> <td>Total</td><td>20</td></tr> </table>	Sub-criteria	Points obtainable	More than 9 years relevant experience in relation to similar projects	7	Between five (5) – six (6) years relevant experience in relation to similar projects	6	Between four (4) – five (5) years relevant experience in relation to similar projects	5	Three (3) – four (4) years relevant experience in relation to similar projects	2	Total	20	20
Sub-criteria	Points obtainable												
More than 9 years relevant experience in relation to similar projects	7												
Between five (5) – six (6) years relevant experience in relation to similar projects	6												
Between four (4) – five (5) years relevant experience in relation to similar projects	5												
Three (3) – four (4) years relevant experience in relation to similar projects	2												
Total	20												
3. Demonstrated relevant experience and competencies of service provider and responsible individual/s (specific reference must be made to competencies listed in section 4 above) <table> <tr> <th>Sub-criteria</th><th>Points obtainable</th></tr> <tr> <td>Alignment to criteria in section 4 – high</td><td>10</td></tr> <tr> <td>Alignment to criteria in section 4 – medium</td><td>7</td></tr> <tr> <td>Alignment to criteria in section 4 -low</td><td>3</td></tr> </table>	Sub-criteria	Points obtainable	Alignment to criteria in section 4 – high	10	Alignment to criteria in section 4 – medium	7	Alignment to criteria in section 4 -low	3	20				
Sub-criteria	Points obtainable												
Alignment to criteria in section 4 – high	10												
Alignment to criteria in section 4 – medium	7												
Alignment to criteria in section 4 -low	3												

Total	20	
4. Technical merit of proposal (approach and event plan highlighting key steps, timeframes)		40
Sub-criteria	Points obtainable	
Merit of the proposal and event plan – Proposal and Plan highly defined	10	
Merit of the proposal and event plan – Proposal and Plan fairly defined	7	
Merit of the proposal and event plan – Plan weakly defined	3	
Total	20	
TOTAL		100

** Service providers who fail to score a minimum of 70 points out of a possible 100 points on functionality criteria will not be eligible for further consideration.

The Preferential Procurement Policy Framework Act (No. 5 of 2000) and SANBI procurement process applies to these Terms of Reference. Note that service providers are required to comply with the processes outlined here and failure will result in the disqualification of proposals:

- a) Service providers are required to submit a valid tax clearance certificate with their proposals (see SBD 2). Where the service provider is not in possession of a valid tax clearance certificate, this should be applied for in good time ahead of the proposal deadline.
- b) The 80/20 point system will be applied in evaluating proposals, where price constitute 80 points and the BBBEE scorecard constitutes 20 points.
- c) The Standard Bidding Forms (included in the bid documentation) must be completed and submitted with this proposal.

7. Reporting requirements and management

- An inception meeting will be held following the signing of the agreement and a workplan, that will be developed with the Deputy Director: Biodiversity Informatics and Partnerships
- The service provider will be working with Deputy Director: Biodiversity Informatics and Partnerships, on the set up for each conference/workshop/learning exchange/outreach activity.
- Together with the Deputy Director: Biodiversity Informatics and Partnerships, the service provider will draw up a workplan based on events and a budget that specifies (a) the number of hours/days allocated by the service provider and (b) any additional services/expenses that need to be procured separately (e.g. catering) through SANBI's systems. This event plan and budget will be signed off by the Deputy Director for each outreach event.
- Accountability and reporting will be to the DD: Biodiversity Informatics & Partnerships.
- All reports must be in MS Office format (Word or Excel preferred).
- An electronic version of all reports must be submitted. The exact number and nature of reports will be agreed between the service provider and the appropriate Project Manager for each event.

8. Contractual arrangements

- The contract will be drawn up between SANBI and the service provider.
- Invoices will be paid for deliverables received as agreed in the contract.
- Invoices must indicate the deliverables produced.

- No upfront payments will be made. SANBI will pay for the satisfactory completion of work within 30 days of submission of invoices.
- In the case of invoices to SANBI, they must be addressed to the DD: Biodiversity Informatics and Partnerships.
- Copyright of all work product is retained by SANBI.

9. Proposal submissions

Closing date for submissions: 11:00pm on **14 March 2025**

Requests for further information to these TOR must be emailed to Fatima Parker-Allie (F.Parker@sanbi.org.za).

Submission of proposals: proposals must be emailed to S.SCM-Quotations@sanbi.org.za