

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)					
RFQ NUMBER:	Q11874/2025	CLOSING DATE:	16 March 2026	CLOSING TIME:	11:00AM
SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE (SANBI) REQUIRES A SERVICE PROVIDER TO PERFORM CLIMATE FINANCE PROGRAMMING AND PROJECT PROPOSAL DEVELOPMENT					
BID RESPONSE DOCUMENTS MAY BE E-MAILED TO BELOW ADDRESSES:					
Submission of proposals: Proposals must be emailed to Ms. Anathi Mbadla @ a.mbadla@sanbi.org.za and copy S.SCM-Quotations@sanbi.org.za					
<u>Please state the Bid number as the reference number on the subject line when responding to the RFQ</u>					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Anathi Mbadla		CONTACT PERSON	Faslona Martin	
TELEPHONE NUMBER	012 018 8293		TELEPHONE NUMBER	(021) 799-8895	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	A.Mbadla@sanbi.org.za		E-MAIL ADDRESS	F.Martin@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:

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:

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

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.

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 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

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.

SBD 6.1

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:

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) & \text{or} & Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = 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:

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) & \text{or} & Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmax = 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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (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)	10	
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. Information will be verified on CSD. CSD must be attached as proof)	10	
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

CLIMATE FINANCE PROGRAMMING AND PROJECT PROPOSAL DEVELOPMENT

Postal Address: Private Bag X7, Claremont 7735

Physical Address: Centre for Biodiversity Conservation, Kirstenbosch National Botanical Garden, Rhodes Drive, Newlands

Quotation Number: Q11874/2025

The South African National Biodiversity Institute (SANBI) wishes to appoint an individual consultant to provide climate finance and project proposal development support to the Adaptation Policy and Resourcing Division in its Adaptation programming

1. Background

The Green Climate Fund (GCF) and the Adaptation Fund (AF) have been established within the framework of the United Nations Framework Convention on Climate Change (UNFCCC), to assist developing countries to counter climate change.

Both the GCF and AF make use of Accredited Entities to develop funding proposals and oversee, supervise, manage and monitor their respective approved projects and programmes. The South African National Biodiversity Institute (SANBI) was accredited as the National Implementing Entity for the Adaptation Fund and Direct Access Entity of the Green Climate Fund in 2011 and 2016 respectively, with the aim of developing and implementing climate change adaptation projects to further support South Africa's Climate Change adaptation ambitions.

SANBI is currently developing several funding proposals focused on Climate Change Adaptation, predominantly Ecosystem-based Adaptation, for future consideration by the GCF and AF Secretariats and Boards.

2. Objectives of the of the consultancy

SANBI wishes to appoint a suitably qualified and experienced consultant/consulting firm or joint venture to provide support to the SANBI Adaptation Policy and Resourcing (APR) Division in planning, coordinating and developing project proposals for submission to the GCF and AF. The consultant will work closely with the Director: Climate Change Adaptation and other members of the APR team; supporting them to deliver and lead on programming activities.

3. Duties and Responsibilities

The consultant/consulting firm/joint venture will be appointed for a period of approximately 90 days over a period of 15 months, commencing in 1 April 2026 or as close to this date as possible. The contract will be time and deliverable based. The deliverables to be produced and associated number of days will be agreed upon on an iterative basis over the duration of the contract. For each assignment/deliverable, the service provider is expected to provide:

- a quote according to the requirements of the assignment within a timeframe of 4 working days; and,
- a plan, detailing the start and end dates of the assignment as well as the approach.

The agreement will be structured on a draw down method against each deliverable as agreed to by the parties in writing.

Workplans that set out days to be spent and associated deliverables will be developed iteratively and signed off by the Director: Climate Change Adaptation or an allocated SANBI Project Manager prior to the commencement of work, and work will be undertaken accordingly. Invoices shall include number of days spent and shall be paid on the approval of associated deliverables. Project related disbursements for travel and accommodation will be reimbursed as per the conditions of the contract, and as agreed by the SANBI Project Manager in writing prior to the incurrence of such expenditure.

Indicative tasks and deliverables for the consultant are as follows:

- Establish and/ or confirm the requirements for Concept Note and Funding Proposal submissions to the GCF and AF, and update the team on relevant GCF and AF operational policy changes should these arise.

- Support APR Division staff to design consultation and technical engagement processes in support of Concept Note and Funding Proposal development. Consultation processes are expected to target a range of stakeholders, from community representatives to civil society and non-governmental organisations, the private sector and government.
- Provide technical support to APR Division in writing and reviewing of CN's and Full Funding Proposals to ensure high-quality and alignment with GCF & AF requirements
- Convene and participate in stakeholder workshops and meetings as required to ensure relevant stakeholder involvement in the design of the project proposals.
- Assist APR Division in facilitating and coordinating effective stakeholder and community engagement processes during project proposal development
- Prepare Terms of Reference for relevant specialist studies and/or undertake such studies as required.
- Provide guidance to APR Division team members regarding the completion of Concept Note and Funding Proposal documentation.
- Write and/ or review sections of Concept Notes and Funding Proposals and supporting annexures using the GCF and AF templates, as appropriate.
- Support the APR Division to incorporate and address comments received from internal and external stakeholders and reviewers.
- Assist in responding to comments from the GCF and AF Secretariats and Boards after the Concept Notes and/or Funding Proposals have been submitted.
- Support APR Division staff to prepare presentations about the emerging projects and process for relevant oversight and governance meetings.
- Support APR Division staff in day to day project management functions, including the setting and monitoring of timelines towards proposal completion and submission.
- Provide mentoring support to APR Division staff as required.

The programme of work will need to be iterative and responsive to changing and unforeseen circumstances. The individual consultant will be expected to accommodate these changes.

4. Required competencies, skills and experience

To fulfil this role, the individual consultant or firm will require the following competencies, skills and experience:

- Evidence of experience in developing successful funding applications for the Green Climate Fund, Global Environment Facility, Adaptation Fund, Special Climate Change Fund or similar.
- Proven ability in facilitation and design of project proposals involving a variety of community stakeholders, non-governmental organisations and governmental organisations at all levels, in a climate change, conservation and/ or development context.
- Demonstrable experience in providing technical support to climate change, conservation and/or development programmes.
- At least 10 years of experience in their field of expertise.
- Excellent understanding of the Logical Framework and/or Theory of Change and similar approaches to project design.
- Excellent verbal communication skills and proficiency in written English.
- Excellent organisational and coordination skills.
- Good interpersonal and teamwork skills.
- Willingness to travel nationally.

The individual consultant or firm should be able to meet with the Director: Climate Change Adaptation at the SANBI offices in Pretoria regularly, as well as travel to the various project sites as required.

5. Mandatory requirement documentation: Failure to submit will lead to disqualification

- SBD forms (SBD 1, 4, 6 ad 1). The Standard Bidding Forms (included in the bid documentation) must be completed and submitted with this proposal.
- Quotations must include cost breakdown of the specifications, and the price must be VAT inclusive. This should be in accordance with the requirements under point no.8 below.

Additional submission requirements:

- A copy of the company Central Supplier Database (CSD) registration report. If it is an individual consultant, they must be registered as an entity and must be registered on CSD

6. Requirements for applications and evaluation criteria

Individual consultants or firms that are interested in this opportunity should submit a concise application which **must include**:

- A cover letter outlining relevant knowledge, experience and skills responding to the main requirements as detailed above. The CV of the individual consultant or individuals in a firm that will be responsible for executing this project should be attached to the proposal.
- Provide a portfolio detailing past project proposals experiences (appropriateness of work portfolio, previous relevant projects and overall track record including success rate with funders).
- Relevant examples of previous project proposals to secure funding for climate change adaptation related projects that have been developed. Please state specific role played and whether or not the proposal for funding was approved.
- Provide an overview of stakeholder consultation and facilitation processes at different scales of governance (e.g. with project partners, community engagement or decision makers) for the project proposals listed above.
- Reference letters from current or recent clients who are familiar with the technical area of expertise required for this consultancy.

7. Evaluation criteria

In accordance with the National Treasury Instruction Note on the Amended Guidelines in Respect of Bids that include Functionality as a Criterion for Evaluation (Issued 3 September 2010), this bid will be evaluated in two stages: In accordance with the Preferential Procurement Regulations, 2022 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 specific goals.

Stage 1:

The first stage will evaluate functionality according to the criteria listed in the tables below and sufficient information should be provided.

The firm or the individual consultant will need to demonstrate their past experience (appropriateness of work portfolio, previous relevant projects and overall track record). A cover letter outlining relevant knowledge, experience and skills responding to the main requirements as detailed above. The CV of the individual consultant or individuals in a firm that will be responsible for executing this project should be attached to the proposal. • 10 or more years work experience in project and proposal development using Logical Framework and/or Theory of Change methodologies or similar, and working with foreign donor funded projects with 5 relevant projects undertaken • 10 or more years work experience in project and proposal development using Logical Framework and/or Theory of Change methodologies or similar, and working with foreign donor funded projects with 3 or less similar projects undertaken • 5 or more years work experience in project and proposal development using Logical Framework and/or Theory of Change methodologies or similar, and working with foreign donor funded projects with 3 relevant/similar projects undertaken • 3 or more years work experience in project and proposal development working with foreign donor funded projects with 2 or less relevant projects undertaken • Less than 3 years' work experience in project and proposal development working with foreign donor funded projects with 2 or less projects undertaken • Does not have relevant experience for the project	30
	• 30 • 24 • 18 • 12 • 6 • 0
List of project proposals developed and funding secured of similar nature, type, and complexity, including foreign donor-funded projects.(how many projects) • More than 5 similar foreign donor-funded project proposals developed and funding secured • 5 similar foreign donor-funded project proposals developed and funding secured • 4 similar foreign donor-funded project proposals developed and funding secured • 3 similar foreign donor-funded project proposals developed and funding secured	15
	• 15 • 12 • 9 • 6 • 3

1 - 2 similar foreign donor-funded project proposals developed and funding secured 0 similar foreign donor-funded project proposals developed and funding secured	0
The firm or the individual consultant to demonstrate experience of working in the Climate Change sector and specifically with Climate Change Adaptation and Ecosystem-based Adaptation projects. Relevant examples of previous project proposals to secure funding for climate change adaptation related projects that have been developed. Please state specific role played and whether or not the proposal for funding was approved. 5 years and more work experience in Climate Change and specifically Climate Change Adaptation and Ecosystem-based Adaptation projects 3 to 4 years' work experience in Climate Change and specifically Climate Change Adaptation and Ecosystem-based Adaptation projects 2 years' work experience in Climate Change and specifically Climate Change Adaptation and Ecosystem-based Adaptation projects 5 years and more work experience in Climate Change 3 to 5 years work experience in Climate Change - Less than 3 years' work experience in Climate Change	20 20 16 12 8 4 0
Stakeholder engagement and facilitation experience: Provide an overview of stakeholder consultation and facilitation processes at different scales of governance (e.g. with project partners, community engagement or decision makers) for the project proposals listed above. 5 years and more work experience in stakeholder engagement and facilitation with a diverse set of stakeholders 4 years' work experience in stakeholder engagement and facilitation with a diverse set of stakeholders 3 years' work experience in stakeholder engagement and facilitation with a diverse set of stakeholders 2 years' work experience in stakeholder engagement and facilitation with a diverse set of stakeholders 1 year of work experience in stakeholder engagement and facilitation with a diverse set of stakeholders - Less than 1 year of work experience in stakeholder engagement and facilitation with a diverse set of stakeholders	20 20 16 12 8 4 0
Reference letters of current and or previous (contactable) clients for which a similar service was provided i.e. foreign donor funded proposal development (minimum of 5 reference letters). Signed reference letters with (company name, contact person, telephone number, services provided, total value of the contract and contract duration with dates, performance of the Service Provider per service provided). 5 and more relevant reference letters 4 relevant reference letters 3 relevant and reference letters 2 relevant and reference letters 1 relevant and reference letter 0 relevant reference letters	15 15 12 9 6 3 0
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.

Stage 2

The second stage will evaluate the price and specific goals of those bids that meet the minimum threshold for functionality.

Specific Goal	Total Points
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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)	(10)
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. Information will be verified on CSD. CSD must be attached as proof)	(10)
Total	(20)

8. A pricing schedule reflecting the following, should be provided:

- A daily rate to undertake the work as well as a total budget for 90 days over a period of 15 months of work to be contracted.
- An R150 000 disbursement budget for travel and accommodation should be included in the budget. This will be claimed on submission of receipts as per the contract and in line with SANBI's policies and rates. Travel requirements will be discussed at the inception meeting and on an ongoing basis.

9. Reporting requirements and management

Accountability will be to the Director: Climate Change Adaptation.

All written reviews must be submitted in MS Office and/or PDF and/or design package format, as appropriate.

10. Contractual arrangements

The contract will be drawn up between SANBI and the service provider.

Invoices will be paid on agreed deliverables produced in accordance with the contract. SANBI will pay for the satisfactory completion of work within 30 days of submission of invoices. Invoices must be addressed to the Director: Green Climate Fund Programming.

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Closing date for submission of applications: **16 March 2026 @11:00AM**. No late submissions will be accepted.

Submission of proposals: proposals must be emailed to Ms. **Anathi Mbadla** @ a.mbadla@sanbi.org.za and copy **S.SCM-Quotations@sanbi.org.za**

Requests for further information to these Terms of Reference must be emailed to f.martin@sanbi.org.za ,telephone on **021 799 8895**.

Annexure A: Pricing Schedule

- A daily rate to undertake the work as well as a total budget for 90 days over a period of 15 months of work to be contracted.
- An R150 000 disbursement budget for travel and accommodation should be included in the budget. This will be claimed on submission of receipts as per the contract and in line with SANBI's policies and rates. Travel requirements will be discussed at the inception meeting and on an ongoing basis.

DESCRIPTION	HOURLY RATE	VAT	TOTAL COST
Experienced Senior Level consultant	R	R	R
Disbursements			R 150 000
Total cost incl. VAT			R