

**INVITATION TO SUBMIT A PROPOSAL FOR REQUIREMENTS OF THE UNIVERSITY  
OF VENDA (Univen)**



**BID SPECIFICATION**

**PROJECT DESCRIPTION:**

**REQUEST FOR PROPOSAL: SUPPLY AND IMPLEMENTATION  
OF A COMPUTERIZED FACILITIES MANAGEMENT SYSTEM  
(CAFMS)**

**TENDER NO: FIN/021/2020**

<b>NAME OF BIDDERS</b>	
<b>TENDER AMOUNT</b>	

**FOR MORE INFORMATION:**

Xhanti Ben-Mazwi

EMAIL: [xhanti.benmazwi@univen.ac.za](mailto:xhanti.benmazwi@univen.ac.za)

Date: 05 October 2020

**SUBMISSION TO BID SPECIFICATION COMMITTEE FOR APPROVAL.**

<b>BSC MEMBERS</b>	<b>SIGNATURE</b>	<b>DATE OF APPROVAL</b>
<b>Chairperson</b>		
<b>SCM</b>		
<b>Technical (End User)</b>		
<b>Legal Department</b>		

**RFP NUMBER: IN/021/2020**

**DESCRIPTION: SUPPLY AND IMPLEMENTATION OF A COMPUTERIZED FACILITIES MANAGEMENT SYSTEM (CAFMS)**

**CLOSING DATE: 23 NOVEMBER @12:00 MIDDAY**

**CLOSING VENUE: Tender documents to be submitted at the tender**

**box of the Facilities Department office:**

**UNIVERSITY OF VENDA Mphephu Drive,**

**Opposite Khoroni Hotel**

**THOHOYANDOU**

**0950**

**CLOSING TIME: 12:00 MIDDAY**

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## 1. Intent

Univen is inviting experienced and reputable service providers for the **SUPPLY AND IMPLEMENTATION OF A COMPUTERIZED FACILITIES MANAGEMENT SYSTEM (CAFMS)**

## 2. Confidentiality

This document may not be used for any purpose by the Bidder other than for developing their response to it, and all reasonable efforts must be taken by the Bidder to ensure confidentiality of any information provided. This document and any other information of a confidential nature provided to the Bidder during the course of the Request for Proposal (RFP) process are to be covered by the non-disclosure agreement signed between the and the Bidder(s).

## 3. Procedural compliance

### 3.1 Intent to respond

An interested Bidder is required to advise the of its intention to submit a proposal by completing and returning the **“Intention to Respond” form (Appendix B)** no later than **23 November 2020**. Should a party decide not to respond to this RFP, you are requested to continue to treat the information as confidential in perpetuity.

### 3.2 Responsibility for costs

Under no circumstances shall the accept any responsibility whatsoever for any of the Bidder's costs associated with the preparation and/or submission of its Bid/Proposal, including any costs incurred by the Bidder prior to the signature, by both parties, of an agreement resulting from a successful bid.

### 3.3 Amendments to the RFP

Amendments to this document shall only be effective if agreed by the and confirmed in a written addendum to the RFP. The reserves the right to modify the scope of this document at any time prior to and after the award of the tender.

### 3.4 Delivery of proposals or bids

The Bidder is responsible for ensuring that the Bid/Proposal is sealed and delivered on time in the tender box as indicated in the document. The undertakes that the Bids/Proposals shall be stored in a secure place, opened at the same time and not before the deadline for submission.

### 3.5 No obligation to proceed

The reserves the right to discontinue the RFP process at any time prior to the formation of the envisaged agreement and will give written reasons for the cancellation upon written request to do so. The University of Venda, directors, employees, representatives including the Representative shall not be liable for any losses, claims or damages of whatsoever nature or howsoever arising that may be sustained by a Bidder or any other person as a result of its participation or any amendment, termination or suspension of the process set out in this RFP or its exclusion from participating in the tender process at any point. It is an express term that shall in no way be liable for any indirect/consequential damages, loss of profits, etc. suffered by the Bidder during the RFP process, award, negotiating and/or contracting phase.

After any cancellation of the tender process or the rejection of all tenders due to non-compliance with the thresholds, may abandon the proposed work and services, have it performed in any other manner, or re-issue a similar invitation to tender at any time.

### 3.6 No contract

Bidders shall note that this RFP does not commit the to any course of action resulting from the receipt of Bids/Proposals and the may, at its discretion, reject any Bid/Proposal that does not conform to instructions and specifications that are contained herein or select a Bidder based upon its own unique set of criteria. also reserves the right not to select a Bidder/award the tender. The does not become bound by any obligations prior to the signature, by both parties, of an agreement - to be negotiated, resulting from a successful bid.

Nothing in this document shall be construed as a contract between the parties and no communication, whether verbal or written, by the personnel or agents during the course of this process shall create such a contract in respect of the requirements specified in this RFP.

shall not be liable for any fees incurred due to any work done/services performed by the Bidder prior to signature, by both parties, of an agreement resulting from a successful bid.

### 3.7 Validity of proposals

The proposal shall remain valid for a period of one hundred and twenty (120) days from the submission date, where after such proposal expires. retains the right, but is under no obligation, to request Bidders to extend the validity periods of their proposals, prior to expiry thereof. Such request, if any, shall be in writing. The Bidder is not obliged to extend the validity period.

### 3.8 Intellectual Property

The Bidder undertakes that the retains ownership of all Intellectual property rights on all material and processes developed that relate to the service provided for and on its behalf by the Bidder. The Bidder undertakes to transfer all said Intellectual Property Rights, whether registered and / or unregistered, to the University of Venda, including undertaking to sign all forms necessary to affect such transfer.

## 4. General Instructions

### 4.1 Assumptions

The has endeavoured to provide sufficient guidance to inform Bidders' Bids/Proposals. However, it may be necessary to make some assumptions. Where assumptions have been made these must be documented in the Bid/Proposal. The accepts no responsibility for assumptions made by the Bidder.

### 4.2 Requests for clarification/additional information

Requests for additional information, questions or issues fundamental to the quality or clarity of the response should be submitted using the '**Request for Proposal Enquiry**' (**Appendix N**). Additional information will be provided at the discretion of the University of Venda. The also reserves the right to provide the same information to all other interested Bidders.

### 4.3 Contact information

All enquiries regarding this RFP must be e-mailed to [xhanti.benmazwi@univen.ac.za](mailto:xhanti.benmazwi@univen.ac.za) and not contact any other personnel regarding this RFP as this may lead to disqualification of the bid. Also note that any canvassing by Bidders regarding this RFP will result in disqualification.

#### 4.4 Timescale

The proposed timescales for the RFP process are indicated below.

Item	Milestone	Date
1	Date of RFP advertisement	30 October 2020
2	Appendix A, Intention to respond released and submitted (Not Compulsory)	02 November 2020
3	Final Date for Bidders to submit consolidated requests for clarification (Questions)	14 November 2020
4	Closing Date for Submission of final Proposal	23 November 2020 @12:00am

#### 4.5 Management summary

This section should be submitted as a separate document. The information to be provided in the Management Summary shall include, but not be limited to the following items

- Company profile
- Completed 'Statement of compliance' (Appendix K)

#### 4.6 Presentations

The University shall request shortlisted bidders to present for clarification as part of the evaluation process .

#### 4.7 Clarification and inspections

The may submit clarification in writing on specific tender aspects to obtain a better understanding of the received bid/s. This may also include possible inspections of the Bidder's premises at an agreed upon date and time.

#### 4.8 Submitting a response

##### 4.8.1 Due date

- Proposals/ Bids are to be submitted by closing date and time as stipulated on page 1.
- Proposals/ Bids must be submitted at the tender box at the University Main Gate  
UNIVERSITY OF VENDA Mphephu Drive,  
Opposite Khoroni Hotel  
THOHOYANDOU  
0950

- Bidders may make use of courier services or alternative means, at their own cost and must ensure that bids are deposited in the tender box.
- The responsibility for on-time delivery rests entirely with the Bidders.
- **Electronic Proposals/ Bids will not be accepted.**
- **Late submissions will NOT be accepted.**

#### **4.8.2 Responses to the RFP Format**

- All responses to the RFP must be submitted in hard copy and soft copy format. may disqualify Bidders who fail to adhere to this requirement.

Bidders must submit 1 original response and 1 copy and an electronic version which must be contained in a CD or Memory Card clearly marked in the Bidders name. The sealed envelopes must indicate the following: **Bidder's Name, The Tender Number, RFP Closing date and Time, The number of copies contained and The Bidders return address.**

- Bidders must ensure that their response to the RFP is in accordance with the structure of this document.
- Where Bidders are required to sign forms they are required to do so using a black ink pen
- Any documents forming part of the original responses to RFP but which are not original in nature, must be certified as a true copy by a Commissioner of Oaths.
- Each response to RFP must be in English and submitted in A4 format, except other graphic illustrations, which may not exceed A3 format, unless the contrary is specifically allowed for in this RFP. Responses to RFP must be neatly and functionally bound, preferably according to their different sections.
- The original responses to RFP must be signed by a person duly authorized by each consortium member and Subcontractor to sign on their behalf, which authorization must form part of the responses to RFP as proof of authorization. By signing the responses to RFP the signatory warrants that all information supplied by it in its responses to RFP is true and correct and that the responses to RFP and each party whom the responses to RFP signatory represents, considers themselves subject to and bound by the terms and conditions of this RFP.
- The responses to RFP formulation must be clear and concise and follow a clear methodology which responses to RFP must explain upfront in a concise Executive Summary and follow throughout the responses to RFP.
- Responses to RFP must provide sufficient information and detail in order to enable UNIVERSITY OF VENDA to evaluate the responses to RFP, but should not provide unnecessary detail which does not add value and detracts from the ability of to effectively evaluate and understand the responses to RFP. The use of numbered headings, bullet points, sections, appendices and schedules are encouraged.
- Information submitted as part of a responses to RFP must as far as possible, be ordered according to the order of the required information requested by University of Venda.
- Responses to RFP must ensure that each requirement contained in the RFP is succinctly addressed.

- Responses to RFP should as far as possible use the terms and definitions applied in this RFP and should clearly indicate its interpretation of any differing terminology applied.

#### 4.8.3 Proposal format

Each proposal shall include a detailed description of the Bidder's capabilities with regard to the requirements set out in **Appendix A and Section 5.3** of the functionality.

## 5. Evaluation of the RFP

### STAGE 1 - RETURNABLE DOCUMENTS FOR ADMINISTRATIVE COMPLIANCE

Bidders must provide the following administrative compliance documents.

**NB: Please ensure all this documents are returned**

		Y/N	Office use only
1	Company Registration Certificate – CIPRO		
2	Valid SARS Tax Pin		
3	Signed JV Agreement (where applicable)		
4	Comprehensive Company Profile		
5	Valid Certified ID Copies of all Company Directors within 3 months old		
6	Proof of Business Address		
7	Fully Initialled & Completed all tender document pages		
8	Signed Declaration of Interest		
9	Bank Account Confirmation Letter with Grading		
10	Positive Written Reference Letter/s from previous/current clients		
11	Board Resolution: Certificate for authority for signature		
12	Proof of Tender Document Purchase		
13	Audited Annual Financial Statement within 12 months (2019/2020)		
14	Completion of the Standard Bidding Forms (SBD 4, 8, 9)		
15	Bidders to provide an approach and strategy to execute the project		
16	Professional Indemnity insurance document		

### STAGE 2 – TECHNICAL/FUNCTIONALITY EVALUATION

Technical evaluation will be as follows:

- Disqualification Criterion – Technical Threshold is 70%,
- Functional Evaluation Criterion - Technical Threshold is 70%
- Non-Functional Evaluation Criterion - Technical Threshold is 70%

### STAGE 3 – PRESENTATION

Live Software Demonstration

- Disqualification Criterion – Technical Threshold is 70%,
- Functional Evaluation Criterion - Technical Threshold is 70%



Bidders must note that if you pass all the technical evaluation you will be further evaluated on price and BBBEE.

Bidders must clearly respond to each of the below, this will be strictly reviewed and scored according to the overall feedback provided in the proposal **and clearly numbered in the Table of contents**

**Bidders will be evaluated on a scale of 1 – 5 where; 0 = Very poor; 1 = Poor; 2 = Average; 3 = Good; 4 = Very good and 5 = Excellent**

1	Disqualification Criterion	Weighting	Score	Total Score
1.1	<b>Company Experience and Track Record</b>	<b>20%</b>		<b>0.00%</b>
	Number of years' experience in the supply of HCM Software 1 Year or lesser = 1 >1 to 2 Years = 2 >2 to 5 Years = 3 >5 to 6 Years = 4 >6 Years or more = 5			
1.2	<b>Indicate whether the bidder will make available a dedicated account manager to the University of Venda.</b>	<b>20%</b>		<b>0.00%</b>
	1 - No 5 - Yes			
1.3	<b>Project Management</b>	<b>30%</b>		<b>0.00%</b>
	Bidder will complete the implementation within one (1) month from date of award. 1 - No 5 - Yes			
	Bidder has provided the Detailed Scope of Work 1 - No 5 - Yes			
	Bidder has provided a proposed implementation plan 1 - No 5 - Yes			
	Bidder has provided Project Governance and Progress Reporting mechanism 1 - No 5 - Yes			
	Bidder has provided Project Change Control Procedures 1 - No 5 - Yes			
1.4	<b>Reference Sites</b>	<b>30%</b>		<b>0.00%</b>
	Bidder has provided the details of three (3) reference implementations 1 - No 5 - Yes			
	Bidder has provided the contactable references for the three reference implementations 1 - No 5 - Yes			
<b>TOTAL SCORE</b>				<b>0.00%</b>
	<b>Bidder must acquire a minimum total score of 70% in order to proceed into the functional evaluation</b>			

2	Functional Evaluation Criterion	Weighting	Score	Total Score
<b>Functionality will be measured on a scale of 1-3</b> <b>Does not Comply:1,</b> <b>Partially Complies:3,</b> <b>Fully Complies :5,</b>				
2.1	Asset Management	30%		0.00%
	<b>Proposed solutions ability to deliver the following:</b>			
	Inventory Management - Does the software provide the ability to track equipment, furniture and ICT assets in use and in inventory?			
	Does the software provide the ability to track assets in the database and in the drawings?			
	Does the software provide the ability to quickly change an asset location, standard and employee assignment in the Asset Form.			
	Does the software provide the ability to move walls, furniture and equipment in the drawing and automatically updates the database.			
	Does the software provide the ability to define building systems that organize assets by function?			
	Does the software provide the ability to track assets as individual components or create an asset made up of many individual components by recording a bill of materials.			
	Does the software keep a full maintenance history with cost for all assets and their components			
	Progress notifications to relevant parties			
2.2	Planned Maintenance	15%		0.00%
	<b>Proposed solutions ability to deliver the following:</b>			
	PLANNED MAINTENANCE - Does the software enable easy scheduling of planned maintenance on a minimum basis of 52 weeks?			
	PLANNED MAINTENANCE - Can the software facilitate maintenance scheduling by allowing PM's to be viewed at least 52 weeks in advanced			
	Planned Maintenance - Can the software maintain each individual asset PM schedule, task, and required maintenance			
2.3	Mobile connectivity	15%		0.00%
	<b>Proposed solutions ability to deliver the following:</b>			
	Mobile connectivity - Does the software have a mobile module interface - work on windows/android/ios ?			

	Can this app be loaded by all University of Venda employees at minimal or no cost			
2.4	<b>Inspection reports</b>	<b>10%</b>		<b>0.00%</b>
	<b>Proposed solutions ability to deliver the following:</b>			
	Will the software allow a user to create an inspection report			
	Does the software provide the user to create inspections reports with the following:			
	Room number/Area			
	Address of place being inspected			
	Date of inspection			
	Ability to select how many rooms (Kitchen, Lab, office)			
	Field notes			
	Does the system automatically create new work orders when an item in an inspection is not up to standard			
2.5	<b>Inventory Management</b>	<b>10%</b>		<b>0.00%</b>
	<b>Proposed solutions ability to deliver the following:</b>			
	Inventory Management - Manage stock and inventory			
	Inventory Management - An Inventory control module - keep track of parts and supplies. Must allow for minimum levels and alert specific persons when levels are reached			
	Inventory Management - track maintenance, labor, and inventory costs			
2.6	<b>Work Order Management</b>	<b>10%</b>		<b>0.00%</b>
	<b>Proposed solutions ability to deliver the following:</b>			
	Work order Management: Modules for managing work orders, can it share updates with requestors?			
	Work order Management - Can the system automatically generate work orders			
	Work order Management - A work order tracker - record every step of a maintenance task.			
	A Work request Module - App where anyone in the company can log the call from their phone or computer?			
	Does the system allow to automatically assign work according to current productivity and schedule, taking into account leave days etc.			
	View in real time all open jobs, and who they are assigned to			
	Can the software add priorities based on predefined criteria			
2.7	<b>Management tools</b>	<b>10%</b>		<b>0.00%</b>
	<b>Proposed solutions ability to deliver the following:</b>			
	Dashboard indicating open jobs			
	Dashboard indicating productivity per team and per individual			
	Dashboard indicating turnaround time per team and per individual			
	Flexible and powerful reporting tool			

	Keep tabs on the work performance of yourself, your team, and outside vendors.			
	Robust reporting and analytics			
	Email and text notifications			
	A simple, easy-to-use interface with a short learning curve			
	Minimal customization required to fit your team's operations			
	User friendly			
	Technical support			
	Web based system			
	Security according to levels			
	Training of super users			
	Provided the Pricing for +/- 40 Devices			
<b>TOTAL SCORE</b>				<b>0.00%</b>
	<b>Bidder must acquire a minimum total score of 70% in order proceed into the non-functional evaluation</b>			

<b>3</b>	<b>Non-Functional Evaluation Criterion</b>	<b>Weighting</b>	<b>Score</b>	<b>Total Score</b>
<b>3.1</b>	<b>Training Services</b>	<b>25%</b>		<b>0.00%</b>
	Bidder will provide system training and technical skills transfer to internal staff to at least 10 UNIVERSITY OF VENDA employees. 1 - No 5 – Yes			
	Bidder has provided a plan for Train the Trainer program to train the SME's 1 - No 5 – Yes			
	Bidder will provide administrator and end user manuals 1 - No 5 – Yes			
	Bidder will provide Online or Built-in User Guides 1 - No 5 – Yes			
<b>3.2</b>	<b>Support Services</b>	<b>25%</b>		<b>0.00%</b>
	Bidder has provided SLA and related costing for a period of three (3) years: 1 - No 5 – Yes			
	Bidder will provide Second Line user and system support: 1 - No 5 – Yes			

	Bidder has provide a rate card for additional support services: 1 - No 5 – Yes			
3.3	<b>Non-functional Requirements</b>	<b>25%</b>		<b>0.00%</b>
	Bidder has provided High-Availability that supports 24x7 operational model: 1 - No 5 – Yes			
	Bidder has provided a solution that caters for the requested security needs: 1 - No 5 – Yes			
	Proposed system has single sign-on capabilities: 1 - No 5 – Yes			
	Access to the proposed system is role based. 1 - No 5 – Yes			
	Proposed system is browser and mobile friendly. 1 - No 5 – Yes			
	Proposed system has auditing and logging capabilities. 1 - No 5 – Yes			
3.4	<b>Proposed System Deployment</b>	<b>25%</b>		<b>0.00%</b>
	<b>List of System Deployment requirements, required as a part of RFQ</b>			
	Bidder has catered for the Private Cloud Hosting of the proposed Solution: 1 - No 5 – Yes			
	Bidder has catered for the solution to be migrated onto the premises as and when required: 1 - No 5 – Yes			
<b>TOTAL SCORE</b>				<b>0.00%</b>
	<b>Total Minimum Threshold = 70%)</b>			

### STAGE 3 – EVALUATION ON PRICE AND BBBEE (Preference Point System)

All bidders that reached the threshold of 70% on the all 3 Technical evaluations and Live demonstration system will be further evaluated on Price and BEE level.

## 6. BBEE Compliance

- Certificates issued by IRBA and Accounting Officers have been discontinued, bidders will be automatically disqualified if they can submit such certificate.  
SANAS BBEE certificates are identifiable by a SANAS logo and a unique BVA number
- The sworn affidavit must be sign by an independent commissioner of oath.
- Bidders must make sure that their sworn affidavit is complete in full
- Bidders must make sure that the sworn affidavit indicate the Financial year
- Bidders must indicate on the sworn affidavit if the turnover if base on Management account or Financial account.
- A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate
- BBEE Certificate and Sworn affidavit must be valid at the time of the closing of the tender.

## 7. Disqualifying criteria is as follows:

- Bidders who do not meet all the requirements as specified on the RFP document scope of work will not be evaluated any further.
- Bidders whose solution is encumbered by any Intellectual Property rights, whether registered and / or unregistered, including but not limited to Copyrights, Patents, Know-How, Registered Designs, Trade Marks, Trade Secrets and the like, will not be considered for award of the bid.
- Bidders who make a misrepresentation on the above 2 points or any other material fact.
- Incomplete submissions with reference to the list of returnable documents defined in Section 3.5
- Any attempt to make contact with the staff other than those designated as contacts.

## 8. Feedback on Proposals

Once the recommendation to the Bid Adjudication Committee has been approved, the successful bidder will be notified in writing.

Successful bidder/s will be issued with a letter of intention . Such letter does not constitute an agreement. The award is wholly subject to the successful Bidder entering into a duly signed contract with UNIVERSITY OF VENDA.

## 9. Contracting

Successful bidder(s) will be required to enter into a contract with the UNIVERSITY OF VENDA for period of three (3) years. A formal Agreement will be signed with the successful bidder and UNIVERSITY OF VENDA further reserves the right to amend, alter or delete clauses relating to, but not limited to: insurance, indemnity, undertaking, guarantees, Intellectual Property, service levels and / or tax compliance.

UNIVERSITY OF VENDA shall not be liable for any costs expended by the bidder prior to any formal agreement being signed. **It is therefore imperative that NO SERVICES are rendered prior to the formal agreement becoming effective.**

**Appendix A**  
**Refer to attached Annexure A for the Scope of Work.**

**SUPPLY AND IMPLEMENTATION OF A  
COMPUTERIZED FACILITIES MANAGEMENT SYTEM**

**1. Introduction**

The UNIVERSITY OF VENDA Facilities department is looking to procure and operationalize a Computerized Facilities Management system (CFMS) to assist with the management of several functions in the department. The aim of the system is to improve efficiencies, productivity and turnaround times of different functions in Facilities as well as provide Facilities Management with quality statistical data to allow improved decision making.

The system will also assist the UNIVERSITY OF VENDA Facilities department in being digitally enabled, in alignment with the UNIVERSITY OF VENDA digitalisation strategy.

**2. Purpose**

The UNIVERSITY OF VENDA would like to invite eligible bidders to supply a Facilities Management System with the following capabilities and provide the related implementation services:

- Daily and Planned Maintenance Management
- Asset Lifecycle Management
- Contracts and Contractor Management
- Document Management
- Helpdesk and Call Logging Management
- Space planning and allocation Management
- Fleet Management
- Facilities Project Management
- Compliance Management

Bidders are also requested to provide the following training and support services:

- Training services as defined further within this RFQ
- **30 Days consulting and post GO-Live support**
- Support and Maintenance services (SLA) for a period of three (3) years.

**3. Scope of the RFP**

The bidders are required to deliver on the following components which are envisioned to achieve the overall objectives highlighted in the purpose of this RFQ:

- Supply and install/provision a software solution that offers all of the capabilities detailed in section 3.1 and;
- Operationalize the Computerized Facilities Management System specific capabilities in accordance with the UNIVERSITY OF VENDA Facilities Departments' needs, as defined in section 3.2 and;
- Participate in the Quality Assurance activities and;
- Provide pricing to support 30 Operational Staff; 5 System Administration Staff and varying number of staff, who participate within the process (i.e. Logging of Issues, Providing feedback, etc.).
- Provide pricing for 20 (forty) devices for the asset and facilities personnel.
- Provide required training services as detailed in section 3.3 and;
- Provide post GO-LIVE support services to the respective UNIVERSITY OF VENDA employees as detailed in section 3.4 and;

**3.1 Solution Provisioning**

The bidders are required to setup and configure the following Facilities capabilities based on the proposed out-of-the-box CFMS functionality:

- **Daily and Planned Maintenance Management**

- Streamline and automate the Preventative Maintenance process to proactively maintain critical assets, minimizing downtime and cost of repairs.
- Schedule, dispatch, manage, and report maintenance tasks efficiently using self-service capabilities to reduce operational costs and increase customer satisfaction
  - Labour Management – Allocate resources based on availability and skills. Enter and track personal time such as vacation and sick time.
  - Prioritization of tasks through predetermined rules.
  - Preventative Maintenance Planning and record keeping
  - Parts lists and store management.
  - Alerts on inspections due and other compliance requirements
  - Upload of documents such as diagrams, drawings, procedures and manuals.
  - Full historical record of maintenance per assets as well as lifetime costs.
  - Automatic work order generation on entry of out of specification task.
  - Mobile solution functionality, seamless integration between back office and mobile workforce.
  - Comprehensive Call logging and Helpdesk functionality with alerts and messages sent to requestor on progress.
  - Electronic work order sign off and real time system update.
  - Extensive and flexible reporting to management on turnaround times, productivity, trends and graphs of number of jobs per discipline.
  - Contractor and contracts management, access to task rates, job schedules, resources charges, contract status, validity dates, cost and SLA's.

- **Asset Lifecycle management**

- Asset Condition and Criticality management
- Asset register and asset management
- Capture information necessary for failure tracking and analysis
- Chart/record meter readings
- Full component and parts lists

- **Contracts and Contractor Management**

- Assist with contract management, easy access to task rates, job schedules, resource charges, contract status, costs and SLA's

- **Document Management**

- Allow to link/upload drawings, flow diagrams, procedures, and manuals per asset but also link to departmental work instructions and standard operating procedures.

- **Management of Work Activities (Helpdesk and Call Logging)**

- Comprehensive call logging facility
- Automated priority setting based on pre-defined business rules and quality check-list.
- Automated email- production support via workflow. Allows definition of business rules to keep customers, managers, team leaders other personnel up to date with FM activities.
- Provide web and mobile access to FM function for both Facilities personnel and clients.
- Ability to extend the FM work management platform to other associated business areas.

- **Space planning and allocation Management**

- Simplify space planning and forecasting to support space planning requirements
- Evaluate and plan space usage to maximize efficiency and decrease total occupancy costs.
- Streamline the chargeback process to increase space accountability and reduce occupancy costs



- **Fleet Management**
  - Allow the booking of Vehicles electronically.
  - Tracking Maintenance of Vehicles
  - Keep track of fuel consumption and services. (Optional)
- **Facilities Project Management (Optional)**
  - Workflow access to a central repository information to keep all project managers aligned to master plans.
- **Compliance Management**
  - Track and manage energy use to control costs, reduce carbon footprint, and mitigate risk.
  - Manage complex compliance requirements proactively to help mitigate risk, ensure safe work environments, and reduce administrative burdens
  - Assist with the management of waste
  - Ensure business continuity and expedited recovery in the event of a disaster

### **3.2 Specific Configurations**

Bidders are expected to implement and configure the Facilities Management System in accordance with UNIVERSITY OF VENDA Facilities Departments' needs listed to ensure all modules as functioning as intended. The UNIVERSITY OF VENDA Facilities department will provide information to assist bidder to get the system working as intended. UNIVERSITY OF VENDA Facilities department will populate the system with assets and information after the system has been tested and found working as intended. Bidders must operationalize all the features as part of the implementation and participate in getting the User Acceptance Testing completed successfully.

### **3.3 Training**

Bidders are requested to deliver the following training services or functionality:

- System training and technical skills transfer to internal staff to at least 10 UNIVERSITY OF VENDA employees.
- Provide the plan for Train the Trainer program to train the planners and super users to run the capabilities efficiently.
- Must provide the user manuals as part of implementation for all the features both for administrator and end user perspective.
- Online / Built-in User Guides to assist new or current employees.

### **3.4 Support Services**

Bidders are requested to provide support services and related costing for a period of three (3) years. The support services must include:

- Second Line user and system support.
- Support service model and rate card for additional support services.
- Support model in case of Cloud Hosting Solution. The bidder must specify what level of support will be provided in the Cloud Hosting Solution.

Bidders must provide a draft Service Level Agreement that reflects the above support services.

### **3.5 Non-functional Requirements**

The proposed solution/platform(s) must cater for the following non-functional capabilities:

- High-Availability that supports UNIVERSITY OF VENDA 24x7 operational model
- Scalable: The proposed solution must allow the UNIVERSITY OF VENDA to scale-up or scale-out in order to support future demands
- Security:
  - The proposed solution must adopt and adhere to UNIVERSITY OF VENDA Security Policy
  - Single Sign On capability – The platform must support Single Sign capability based on industry standards.
  - All the features must be role based configured

- All data must be stored in a secured manner and only made accessible via controlled means of access.
- The platform must have Resilience and Reliability
- The implemented solution must be accessible through
  - Online / Web Channels:  
The system must support multiple browsers and is mobile friendly.
  - APIs / Web Services / Micro-services
- Automated reports: System must flexible enough to allow super users and planners to configure reports as required.
- All activities in the features must be logged and should be auditable.
- The bidders must allow the UNIVERSITY OF VENDA to extract all UNIVERSITY OF VENDA specific data directly from the proposed systems' data store or by exporting the data in an amicably accepted format(s).

### **3.6 Preferred System Deployment**

The bidders are required to provide the Private Cloud Hosting Solution for the proposed ICT solution. The bidders must allow the UNIVERSITY OF VENDA to migrate the solution onto the UNIVERSITY OF VENDA premises as and when required by the UNIVERSITY OF VENDA.

### **3.7 Project Timelines**

The appointed bidder must be available to start with the exercise immediately upon award and complete the implementation within one (1) month. The bidder will provide the support services for a period of three (3) years, subject to annual review of the selected bidder's performance.

The bidder is expected to provide a detailed project execution plan that clearly articulates the following:

- Execution Methodology
- Detailed Scope of Work
- Detailed Project Plan
- Resource Break-down Structure (with Hourly Rates)
- Proposed Project Governance and Progress Reporting
- Project Change Control Procedures

### **3.8 Reference Sites**

The bidder must provide a minimum of three reference implementations. The bidder should provide the following details pertaining to each implementation:

- Brief summary of the initiative
- Delivery timeframe
- Contactable references

**3.9** The bidder must be able to present live demonstration of how the system works.

**Appendix B**

**Intention to respond to the Request for Proposal**

**We hereby accept / decline your Request for Proposal.**

Company: \_\_\_\_\_

Company Representative: \_\_\_\_\_

Position/Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Please state a brief reason for declining this Request for Proposal \_\_\_\_\_

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To: [xhanti.benmazwi@univen.ac.za](mailto:xhanti.benmazwi@univen.ac.za)

## Appendix C

### NON DISCLOSURE AGREEMENT

THIS AGREEMENT is made BETWEEN  
The UNIVERSITY OF VENDA

AND \_\_\_\_\_ (“the Bidder”),  
Registration Number: \_\_\_\_\_ whose registered office is at \_\_\_\_\_

\_\_\_\_\_  
(Hereinafter referred to as the “parties”)

WHEREAS in the course of discussions and/or negotiations with the University of Venda, the Bidder has received, or may receive in future, information relating to **RFP IN/021/2020** for the University of Venda and other related information hereinafter referred to as “Confidential Information”. “Confidential information” shall include, but not be limited to any information disclosed by the UNIVERSITY OF VENDA and / or any of its affiliates, employees, agents, representatives, subcontractors and consultants to the Bidder, its employees, agents, representatives and consultants, whether orally, in writing, by graphic, pictorial or electronic format, which information includes but is not restricted to Business information, including know how, commercial and technical aspects of products, processes and services; status and capabilities of the UNIVERSITY OF VENDA’ business; The UNIVERSITY OF VENDA or its subcontractors’ marketing and planning programs, products specifications, Service specifications, plans, drawings, test results and findings; financial, operational and technical data; and particular types of technologies and inventions, that already currently exist or that the UNIVERSITY OF VENDA wishes to be developed, which could be subject to intellectual property rights, whether registered and/or unregistered.

Therefore the parties wish to agree as follows:

1. The Bidder undertakes to keep strictly secret and confidential all confidential information relayed or transmitted to it in any manner or form and will not divulge any part of the Confidential Information directly or indirectly to any person, firm or entity (other than such of its employees who have a need to know the Confidential Information for the purposes of fulfilling the Bidder’s obligation to the University of Venda).
2. The Bidder undertakes to not make copies of the Confidential Information or otherwise disseminate any of the Confidential Information (except as may be required to fulfil specific obligations towards University of Venda) without University of Venda express prior written consent.
3. This agreement applies to information whether or not such information is marked as or appears to be confidential and whether or not such information is of commercial use to University of Venda or any other party.
4. This agreement shall not apply to information which:-
  - (a) the Bidder can show had been lawfully received by it prior to disclosure under this agreement.
  - (b) is in the public domain or becomes so otherwise than through breach of this agreement;
  - (c) was disclosed to the Bidder by a third party who was under no obligation of confidence in respect thereof;

5. The Bidder further undertakes that the University of Venda retains ownership of all Intellectual property rights on all material and processes developed that relate to the service provided for and on its behalf by the Bidder. The Bidder undertakes to transfer all said Intellectual Property Rights, whether registered and / or unregistered, to the UNIVERSITY OF VENDA, including undertaking to sign all forms necessary to affect such transfer.
6. The Bidder acknowledges that the confidentiality obligations extend from signature of this agreement and survive the termination of the tender process, whether the Bidder is successful or not.

IN WITNESS WHEREOF the parties hereto have executed this agreement in duplicate.

Signed at.....on this.....day of .....2020

On behalf of the University of Venda ..... (signature)

Witness 1. .... Witness 2. ....

Signed at..... on this.....day of ..... 2020

Signed on behalf of the Bidder, duly authorized thereto .....(signature)

..... (name)..... (title)

Witness 1. .... Witness 2. ....

To: [xhanti.benmazwi@univen.ac.za](mailto:xhanti.benmazwi@univen.ac.za)

## **Appendix D**

### **UNIVERSITY OF VENDA STANDARD TERMS AND CONDITIONS**

Bidders must sign the terms and condition to indicate acceptance thereof. Should the bidder have a variation/s, these must be submitted as Annexure F1 indicating the clause number, the rational for not accepting that specific clause and provide an alternative clause.

**NB: please download from the UNIVERSITY OF VENDA website and return initialed pages with the tender**

**Annexure E**  
**Valid tax Clearance Certificate**

## Appendix F

### DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
    - the bidder is employed by the state; and/or
    - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
  2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
    - 2.1 Full Name of bidder or his or her representative: .....
    - 2.2 Identity Number: .....
    - 2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....
    - 2.4 Company Registration Number: .....
    - 2.5 Tax Reference Number: .....
    - 2.6 VAT Registration Number: .....
    - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.
- <sup>1</sup>“State” means –
- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
  - (b) any municipality or municipal entity;
  - (c) provincial legislature;
  - (d) national Assembly or the national Council of provinces; or
  - (e) Parliament.
- <sup>2</sup>“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.
- 2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**
  - 2.7.1 If so, furnish the following particulars:  
  
Name of person / director / trustee / shareholder / member: .....  
Name of state institution at which you or the person connected to the bidder is employed : .....



Position occupied in the state institution: .....

Any other particulars:  
.....  
.....  
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

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

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.11.1 If so, furnish particulars:

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

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

Full Name	Identity Number	Personal Tax Reference Number	State Number Number	Employee / Persal Number

**4 DECLARATION**

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.  
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

**Appendix H**  
**BBBEE Certificate**

**Appendix J**  
**Management Summary (Company profile)**

## Appendix K

### Statement of Compliance to the Request for Proposal

Company Name: \_\_\_\_\_

Proposed Service: \_\_\_\_\_

It is hereby confirmed that the proposal response to the UNIVERSITY OF VENDA' RFP is fully compliant with all points with the exception of the specific issues outlined below:

---

---

---

---

---

---

---

---

Signed: \_\_\_\_\_ (Authorised Signatory)

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Date: \_\_\_\_\_



**Appendix M**  
**Audited Bank Statement OR Bank code letter**

## Appendix N

### Request for Proposal Enquiry

To: xhanti.benmazwi@univen.ac.za

From: \_\_\_\_\_

Questions:

Answers: To: [xhanti.benmazwi@univen.ac.za](mailto:xhanti.benmazwi@univen.ac.za)



**Appendix O**  
**Central Supplier Database Report (MA Number)**

**Appendix P**  
**Standard Bid Document (SBD) 6.1**

**SBD 6.1**

**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 **exceed/not exceed** R50 000 000 (all applicable taxes included) and therefore the .....preference point system shall be applicable; or
- b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for 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	
B-BBEE STATUS LEVEL OF CONTRIBUTOR	
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.

## 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

## 3. POINTS AWARDED FOR PRICE

### 3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

<b>80/20</b>	<b>or</b>	<b>90/10</b>
$Ps = 80 \left( 1 - \frac{Pt - P_{\min}}{P_{\min}} \right)$	or	$Ps = 90 \left( 1 - \frac{Pt - P_{\min}}{P_{\min}} \right)$

Where

- Ps = Points scored for price of bid under consideration
- Pt = Price of bid under consideration
- Pmin = Price of lowest acceptable bid

## 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	
-----	--	----	--

- 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 certificate, 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 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 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 .....

## SBD 4: Declaration of Interest

**Tick box**



**Document for submission**

Please ensure SBD 4: Declaration fully signed and attached

## DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative: .....

2.2 Identity Number: .....

2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....

2.4 Company Registration Number: .....

2.5 Tax Reference Number: .....

2.6 VAT Registration Number: .....

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

<sup>1</sup>“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;



- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

<sup>2</sup>"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder **YES / NO**  
presently employed by the state?

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member: .....

Name of state institution at which you or the person  
connected to the bidder is employed: .....

Position occupied in the state institution: .....

Any other particulars:

.....

.....

.....

2.7.2 If you are presently employed by the state, did you obtain **YES / NO**  
the appropriate authority to undertake remunerative  
work outside employment in the public sector?

2.7.2.1 If yes, did you attached proof of such authority to the bid **YES / NO**  
document?

(Note: Failure to submit proof of such authority, where  
applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

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

2.8 Did you or your spouse, or any of the company's directors / **YES / NO**  
trustees / shareholders / members or their spouses conduct  
business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:  
.....  
.....  
.....

2.9 Do you, or any person connected with the bidder, have **YES / NO**  
any relationship (family, friend, other) with a person  
employed by the state and who may be involved with  
the evaluation and or adjudication of this bid?

2.9.1 If so, furnish particulars.  
.....  
.....  
.....

2.10 Are you, or any person connected with the bidder, **YES/NO**  
aware of any relationship (family, friend, other) between  
any other bidder and any person employed by the state  
who may be involved with the evaluation and or adjudication  
of this bid?

2.10.1 If so, furnish particulars.  
.....  
.....  
.....

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

.....

.....

.....

Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee Number / Persal Number

**4     DECLARATION**

I, THE UNDERSIGNED (NAME).....

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

I ACCEPT THAT THE UNIVERSITY MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23  
OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	.....
Signature	Date

.....	.....
Position	Name of bidder

## Appendix M

### SBD 8: Declaration of Bidders Past Supply Chain Practises

Tick box

Document for submission



Please ensure SBD 8: Declaration of Bidders Past Supply Chain Practises fully signed and attached

## DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
  - a. abused the institution's supply chain management system;
  - b. committed fraud or any other improper conduct in relation to such system; or
  - c. failed to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p><b>The Database of Restricted Suppliers now resides on the National Treasury's website(<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</b></p>	<p>Yes</p> <p><input type="checkbox"/></p>	<p>No</p> <p><input type="checkbox"/></p>
4.1.1	<p>If so, furnish particulars:</p>          		

4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p><b>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</b></p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	<p>Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	<p>Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

SBD 8

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME) .....  
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME  
SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of Bidder



**Appendix Q**  
**Standard Bid Document (SBD) 9**

**SBD 9**

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

- 1 This Standard Bidding Document (SBD) must form part of all bids<sup>1</sup> invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).<sup>2</sup> Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
  - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
  - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

---

(Bid Number and Description)

in response to the invitation for the bid made by:

---

(Name of Institution)

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

I certify, on behalf of: \_\_\_\_\_ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - (a) has been requested to submit a bid in response to this bid invitation;
  - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
  - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium<sup>3</sup> will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation)
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit, a bid;
  - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
  - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

<sup>3</sup> 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.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder

## **PRICING SCHEDULE**

- **PRIMARY COST (CAPITAL AND OPERATIONAL EXPENDITURE)**
- **SECONDARY COST (NOT LIMITED TO ALL MAINTENANCE COST AND CONSULTING COSTS )**