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Terms of Reference for Short term Insurance

BID NUMBER: NWHC 04/2019

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REQUEST FOR PROPOSAL

BID NUMBER : NWHC 04/2019

NWHC COMPULSORY BREIFING : NONE

CLOSING TIME : 12H00

CLOSING DATE : 21 September 2019

NWHC : INVITATION TO PARTICIPATE IN PROVIDING SHORT TERM INSURANCE

1. Kindly furnish the Corporation with a proposal for services shown on the attached forms.
2. The conditions contained in the General Conditions of Contract (GCC), and the attached bid forms, as well as any other conditions accompanying this request, are applicable.
3. No late, incomplete unsigned, submitted in pencil, faxed or emailed bids will be considered. Bids received after the closing date and time are late and will as a rule not be acceptable for consideration.
4. A non-refundable fee of R200.00 is payable for this document.
5. The North West Housing Corporation reserve the right to award any proposal in whole or in part to one or more service providers and does not bind itself to award the lowest bidder.
6. All the documents accompanying this request for proposal must be completed in detail where applicable and sealed in an envelope clearly marked NWHC and placed in the bid box at NWHC Office by no later than 12H00 on the **21 September 2019**.
7. Documents will be available from the **e-Portal and on www.nwhc.co.za** at a **non-refundable fee of R200.00** payable at where you collect the document at our office:-

Bank Account : ABSA
Account Name : NORTH WEST HOUSING CORPORATION
Account Number : 40-5508-6243
Branch Code : 632-005
Reference : NWHC 04/2019

1. PURPOSE

1.1 The North West Housing Corporation (NWHC) hereby invites suitably qualified, experienced and accredited service providers to submit proposal for the provision of short-term comprehensive insurance cover for a period of 36 months. NWHC seeks to appoint a service provider to offer short-term insurance cover to cover the Corporation's three (3) key buildings and one flat. This includes a simplified and user-friendly process of corresponding with the service provider. Such systems must take away the burden of administering the whole insurance portfolio.

2. BACKGROUND

2.1 The North West Housing Corporation (NWHC) is a legal entity established in terms of North West Housing Corporation Act No. 24 of 1982 and it is classified as a Schedule 3 (c) public entity in terms of the Public Finance Management Act No. 1 of 1999. The NWHC exists to provide and further the provision of housing, shelter and accommodation to low income communities. In order to optimally realize its mandate, the North West Housing Corporation has identified three strategic programmes namely administration, housing property development, and property management.

During the past two years the Management and the Board of the North West Housing Corporation took a concerted effort in building and strengthening the corporate governance and administrative support within the NWHC. This has gone a long way in enhancing the efficiency in the delivery of services including quick response to service-related queries.

2.2 As a Schedule 3A public entity, NWHC is responsible for the safeguarding of all its movable and immovable assets in terms of the PFMA, Treasury Regulations and other applicable legislation.

2.3 NWHC has the following assets:

- a) Matlosana Community Residential Unit (Klerksdorp) with 100 units
- b) Morula Hotel (Mabopane- Pretoria)
- c) Segarona building (Mafikeng Industrial site)
- d) Wimpy Flat erf 1392 Mmabatho Unit 7 with 50 units
- e) Movable assets

3. SCOPE OF THE SERVICE REQUIRED

3.1 NWHC seeks to appoint an experienced and accredited Short-Term Insurance service provider to:

- Provide comprehensive insurance cover for losses for a period of 36 months which may be incurred due to:
 - a) Property Theft and Vandalism
 - b) Accidental Damages
 - c) Natural causes which may bring losses/damages to any asset
 - d) Public Liability
 - e) Employer's Liability
 - f) Fire
 - g) Comprehensive Vehicle Cover including roadside assistance
 - h) Other-related risks

3.2 Provide comprehensive insurance cover for movable and immovable assets of NWHC – this includes:

- a) NWHC's immovable properties. This includes buildings which has a combination of thatched roofs and tiled roofing. These properties are occupied either through residential dwelling (Matlosane CRU) and Wimpy flat, used as office space (Segarona building) and commercial (Morula Hotel) establishment providing lodging, meals and other for guest service.
- b) Office and other Equipment in our properties
- c) Furniture and Fittings – which includes various types of wooden/steel/plastic furniture and fittings. Some which are fixtures and some which are unfitted. All this items/equipment are office based.
- d) Two Vehicles (Light bakkie and Sudan)

3.3 Provide SASRIA Cover where necessary (**Sasria** is “a state-owned company and the only short-term insurer that provides **cover** to all the people and businesses that have assets in South Africa, as well as to government entities, against special risks such as civil commotion, public disorder, strikes, riots and terrorism”).

3.4 Provide advice on value for money regarding the cost of insurance, means of cost and saving on insurance costs.

3.5 Provide a clear and user-friendly claim procedure, reasonable turnaround time in replacement of losses/damages.

3.6 Provide quarterly reports on claims (claims processed and paid out/finalised/closed/rejected, claims in progress).

4. REQUIREMENTS FOR CONTENT OF THE PROJECT PROPOSAL

4.1 The project proposal must contain the following mandatory elements:

- Company profile of the bidder, outlining experience, competence, qualified personnel, organogram of the company, methodology proposed on how the NWHC portfolio is to be handled.
- Detailed benefits, limitations or exclusions and sum insured for each cover.
- All fixed or variable costs must be stated on the proposal. Any relevant or inherent costs such as excess, claim preparation costs and any costs are to be included in the proposal. A fixed combined cost of the premiums in SA rand inclusive of VAT must be specified. The premiums must be quoted monthly and annually.
- Valid registration documents for provision of Financial Services and Short-Term Insurance.

5. TERMS AND CONDITIONS

- a) All costs and expenses incurred by the potential service providers relating to their project proposal will be borne by each respective service provider. NWHC is not liable to pay such costs and expenses or to reimburse or compensate service providers in the process under any circumstances, including the rejection of any proposal or the cancellation of this project.
- b) NWHC reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its proposal.
- c) NWHC may require responsive bidders to present and discuss their proposals in person.
- d) NWHC reserves the right not to make any appointment from the proposals submitted.
- e) Bidders shall not issue any press release or other public announcement pertaining to details of their project proposal without the prior written approval of NWHC.
- f) Bidders are required to declare any conflict of interest they may have in the transaction for which the bid is submitted or any potential conflict of interest. It is important that bidders declare their conflict of interest through completion of relevant attached forms.
- g) NWHC reserves the right not to consider further any bid where such a conflict of interest exists or where such potential conflict of interest may arise.
- h) Any and all project proposals shall become the property of NWHC and shall not be returned.
- i) The bid offers and proposals should be valid and open for acceptance by NWHC for a period of 90 days from the date of submission.
- j) Bidders are advised that submission of a proposal gives rise to no contractual obligations on the part of NWHC.
- k) NWHC reserves the right not to award the bid to the bidder that scores the highest points.

- l) Disputes that may arise between NWHC and a bidder must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- m) In addition to adherence to the specific terms and conditions of proposals, provided in this document, the bidder shall be bound by the provisions of the General Conditions of Contract attached hereto, an original signed copy of which must be submitted together with all other bid documentation.
- n) All returnable bid documents must be completed in full and submitted together with the bidder's proposal. Should the returnable documents not be completed, the bid will not be considered any further.
- o) The successful bidder will be subject to supplier clearance process as prescribed by the National Treasury. This process includes, verification of supplier and its shareholders/directors/members' status on the list of defaulters and restricted suppliers.
- p) The proposal must include a company profile/ organization profile, comprising a description of the organization of the bidder, its primary business activity, clients experience, management etc. including at least three references for companies, to whom the service provider has supplied the same service.
- q) After the successful service provider has received the purchase order, they must be able to deliver in full compliance with South African approved standards and in compliance to the specifications provided.

6. RETURNABLE DOCUMENTS

- a) SBD 1 Invitation to BID
- b) SBD 4 Declaration of Interests form.
- c) SBD 6.1 Preference points claim form (valid BBBEE certificate must be submitted together with this completed document).
- d) SBD 8 Declaration of Bidder's Past Supply Chain Management Practices.
- e) SBD 9 Certificate of Independent Bid Determination.
- f) The proposal must include a company profile/ organization profile, comprising a description of the organization of the bidder, its primary business activity, clients experience, management etc. including at least three written references with contactable information from companies whom the service provider offered the same service to.
- g) The service provider must provide proof of a valid license to transact business as a financial services provider issued by the FSB as per financial advisers and intermediary services act. (FAIS Act)

NB: Failure to submit completed returnable forms as mentioned above may disqualify your quotation.

7. Estimated market values of the assets as per latest valuations

No	ITEM	USAGE	ESTIMATED VALUE
1.	Morula Hotel	Used for hotel and gambling	R 152 270 000
2.	Segarona Building	Used for office administration	R 9 300 000
3.	Matlosane CRU	Used for residential dwelling	R 45 000 000
4.	Movable assets	Office use	R 7 800 000
5.	Wimpy Flat	Residential	R 10 233 463
	TOTAL VALUE		R 224 603 463

8. EVALUATION CRITERIA

a) All proposal offers received shall be evaluated based on the following phase out approach:

- **Phase one:** Compliance to the terms of reference and conditions of the tender. Failure to meet any of the conditions of the tender will automatically disqualify your tender on this phase.
- **Phase Two:** Prequalification criteria: Functionality Criteria Values 70% minimum:

Functional Criteria	Weightings
<p>1. Track record of clientele cover</p> <p>Include written reference letters indicating value of contract</p> <ul style="list-style-type: none"> • Between R10 million – R25million = 10 • Between R25.1million – R50 million = 15 • Between R50.1million – R75million = 20 • Between R75.1 million – R100 million = 25 • Greater than R100.1 million = 30 	30
<p>2. Number of client portfolio in public sector:</p> <p>Short term and long term Insurance experience of the Insurance broking company:</p> <ul style="list-style-type: none"> • 16 or more client portfolio = 30 • 11 –15 client portfolio = 20 • 6-10 client portfolio = 10 • Less than 5 client portfolio = 05 <p>Written reference letters from each of the clients and insurers must be submitted. – Please include name of company, contact name and contact details.</p>	30
<p>3. Experience in the industry</p> <ul style="list-style-type: none"> • Between 1 – 3 years = 05 • Between 4– 7 years = 10 • Between 8 – 11 years = 15 • Beyond 12 years = 20 	20
<p>4. Proposal</p> <p>Poor- significantly fails to meet the standards = 5</p> <p>Average – meets the standards in most aspects but fails in some areas = 10</p> <p>Good – meets the standards required = 15</p> <p>Excellent – exceeds the required standards = 20</p>	20

Total	100
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A bidder must obtain a minimum of 80 points on the prequalification phase in order to progress to the next phase. Failure to obtain 80 points will render your proposal non-responsive.

- **Phase three:** preference points for Broad-Based Black Economic Empowerment (BBBEE) Status Level of Contribution (80/20 preference points system), where 80 points are allocated to price, and 20 points are allocated to BBBEE status level as follows;

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

9. **PRICE** (VAT included) 80 Points for price will be awarded with reference to the total fixed proposal amount inclusive of VAT. The service provider with the lowest price shall score the maximum 80 points. Bidders are requested to provide a proposal with a clear break down of costs where applicable.

10. **SUBMISSION OF TENDERS**

Bids must be submitted in a sealed envelope, marked as confidential and for the attention of:

Supply Chain Management - Bid No: NWHC 04/2019

Project Name: Short Term Insurance

BIDS must be placed in the Tender Box located at:

Segarona Building

23 First Street

Mafikeng Industrial Site

2745

NHWC takes no responsibility for mailed tender documents. It is the onus of the service provider to ensure that the document is placed in the Tender Box before closing date and time.

11. CLOSING DATE AND TIME CLOSING DATE:

DATE: 21 September 2019

NO LATE TENDERS WILL BE ACCEPTED

Supply Chain related enquiries, please contact:

Mr H. Bilankulu

SCM Manager

North West Housing Corporation

Segarona Building, 23 First Street, Mafikeng Industrial

2745

Tel: 018 110 0761

Email: humphrey@nwhc.co.za

CONTACT DETAILS

All bidders must furnish the following particulars and include it in their submission

Name of bidder:

Trading Name

VAT registration number (if
Applicable)

Tax Clearance Certificate
submitted YES / NO

Postal address:

Street address:

Key Contact Person:

Telephone number: Code Number

Cellular number:

Facsimile number: Code Number

e-Mail address:

Alternative Key Contact
Person:

Telephone number: Code Number

Cellular number:

Facsimile number: Code Number

e-Mail address:

9. TENDER DATA

9.1 Background

The NWHC is governed by the PFMA and other applicable legislative frameworks. The organization is accountable to Parliament through the Department of Local Government and Human Settlements.

The mandate of the NWHC is to provide suitable accommodation through property development in community residential units, mixed residential units and other interventions.

The NWHC has representation in in the North West Province but seeks to expand its footprint to other provinces as well the Sub-Saharan Africa. The NWHC has the authority to go out on tender for goods and services and appoint any suitably qualified and competent service provider.

Additional information with regards to the structure and functional activities of the NWHC can be obtained at its offices situated at Segarona Building, Industrial site Mafikeng, 2745, Ground Floor, Reception Area by facsimile, email or telephone.

9.2 Tender Details Tender Data (including special conditions of Tender)

The Standard Conditions of Tender make several references to the Tender Data for details that apply specifically to this tender. The Tender Data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the Standard Conditions of Tender. Each item of data given below is cross-referenced to the clause in the Standard Conditions of Tender to which it mainly applies.

Clause number	Tender Data
8.2.1	The employer is North West Housing Corporation (NWHC)
8.2.2	<p>The Tender Documents issued by the Employer comprise the following documents:</p> <p>THE TENDER</p> <p>Part T1: Tendering procedures T1.1 - Tender notice and invitation to tender T1.2 - Tender data</p> <p>Part T2: Returnable documents T2.1 - List of returnable documents T2.2 - Returnable schedules</p> <p>Part C3: Scope of work C3 - Scope of work</p>

8.2.3	NWHC's contact person is: Name: Humphrey Bilankulu Address: No 23 First street Segarona Building INDUSTRIAL SITE Mahikeng, 2745 Tel: (018) 110 0761 Fax: (018) 381 5847
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10. AUTHORITY TO SIGN A BID

Fill in the relevant portion applicable to the type of organization

A. COMPANIES

If a Bidder is a company, a certified copy of the resolution by the board of directors, personally signed by the chairperson of the board, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is before the closing time and date of the bid

AUTHORITY BY BOARD OF DIRECTORS

By resolution passed by the Board of Directors

On..... 20.....

Mr/Mrs..... (whose signature appears below) has been duly authorised to sign all documents in connection with this bid on behalf of

(Name of Company)

IN HIS/HER CAPACITY AS:

SIGNED ON BEHALF OF COMPANY: (PRINT NAME)

DATE:

B. SOLE PROPRIETOR (ONE - PERSON BUSINESS)

I, the undersigned.....

hereby confirm that I am the sole owner of the business trading as

.....

.....

DATE

C. PARTNERSHIP

The following particulars in respect of every partner must be furnished and signed by every partner:

We, the partners in the business trading as.....

hereby authorise

to sign this bid as well as any contract resulting from the bid and any other documents and correspondence in connection with this bid and /or contract on behalf of

Full name of partner	Residential address	Signature	Date

D. CLOSE CORPORATION

In the case of a close corporation submitting a bid, a certified copy of the Founding Statement of such corporation shall be included with the bid, together with the resolution by its members authorising a member or other official of the corporation to sign the documents on their behalf.

By resolution of members at a meeting on 20..... at

Mr/Ms....., whose signature appears below, has been authorised to sign all documents in connection with this bid on behalf of (Name of Close Corporation)

.....

.....

SIGNED ON BEHALF OF CLOSE CORPORATION: (PRINT NAME)

IN HIS/HER CAPACITY AS **DATE:**

SIGNATURE OF SIGNATORY:.....

E. CO-OPERATIVE

A certified copy of the Constitution of the co-operative must be included with the bid, together with the resolution by its members authoring a member or other official of the co-operative to sign the bid documents on their behalf.

By resolution of members at a meeting on 20..... at

.....

Mr/Ms....., whose signature appears below, has been authorised to sign all documents in connection with this bid on behalf of (Name of co-operative).....

SIGNATURE OF AUTHORISED REPRESENTATIVE/SIGNATORY:

.....

IN HIS/HER CAPACITY

AS:..... DATE:

.....

SIGNED ON BEHALF OF CO-OPERATIVE:.....

NAME IN BLOCK LETTERS:.....

F. CERTIFICATE OF AUTHORITY FOR JOINT VENTURES

This Returnable Schedule is to be completed by EACH member of a joint venture submitting a tender.

We, the undersigned, are submitting this tender offer in Joint Venture and hereby authorise Mr/Ms....., authorised signatory of the Company..... acting in the capacity of lead JV partner, to sign all documents in connection with the tender offer and any contract resulting from it on our behalf as a joint venture.

NAME OF JV

ORGANISATION.....

ADDRESS:.....

.....

.....

DULY AUTHORISED SIGNATORY NAME

DESIGNATION:.....**SIGNATURE**.....

DATE:.....

11. DECLARATION OF INTEREST (SBD 4)

- a. Any legal person, including persons employed by the state*, 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 and/or take an oath declaring his/her interest, 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.

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

- i. Full Name of bidder or his or her representative:

.....

- ii. Identity Number:

.....

- iii. Position occupied in the Company (director, shareholder etc.):

.....

- iv. Company Registration Number:

.....

- v. Tax Reference Number:

.....

- vi. VAT Registration Number:

.....

* "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) provincial legislature;
- (c) national Assembly or the national Council of provinces; or
- (d) Parliament.

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vii. 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 / shareholder/ member:

.....

Name of state institution to which the person is connected:

.....

Position occupied in the state institution:

.....

Any other particulars:

.....

.....

.....

.....

viii. Did you or your spouse, or any of the company's directors/ **YES** / **NO** 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 the 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.

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

-3-

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

2.11.1 If so, furnish particulars:

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

DECLARATION

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

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2.1 TO 2.11.1 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY 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.....

12. PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017 (SBD 6.1)

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

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

1. GENERAL CONDITIONS

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

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

1.2

a) The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

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

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

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

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) BBBEE 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:

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

Where

- P_s = Points scored for price of bid under consideration
- P_t = Price of bid under consideration
- P_{min} = 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	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

7.1.1 If yes, indicate:

- i) What percentage of the contract will be
- ii) Subcontracted.....%
- iii) The name of the sub-contractor.....
- iv) The B-BBEE status level of the sub-contractor.....
- v) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

vi) 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 last 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; 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*

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

DATE:

ADDRESS

.....

- (hear the other side) rule has been applied; and
- (d) forward the matter for criminal prosecution.

WITNESSES

1.

2.

13. DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES (SBD 8)

(To be completed by Bidder)

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 supply chain management system.
- 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 as companies or persons prohibited from doing business with the public sector?</p> <p style="text-align: center;">(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
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>To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		

4.3	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?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	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?	Yes <input type="checkbox"/>	No <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

14. CERTIFICATE OF INDEPENDENT BID DETERMINATION (SBD 9)

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 will not
no consultation, communication, agreement or arrangement with any competitor³ be
construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been
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
9. and conditions or delivery particulars of the products or services to which this bid invitation relates.
10. 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.
11. 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.

³ 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.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

15. LIST OF ALL SHAREHOLDERS/DIRECTORS WITH ORIGINAL CERTIFIED COPIES OF THEIR IDS

[List of all shareholders/directors of the company or the consortium/joint venture with the original certified copies of shareholders' / directors' ID to be inserted here]

Attached hereto is the List of all shareholders/directors of the company or the consortium/joint venture with the original certified copy of shareholders' / directors' IDs (in cases of sole proprietor, partnerships and close corporation). Failure to submit the foresaid documentation will lead to disqualification.

16. COPY OF JOINT VENTURE AGREEMENT (IF APPLICABLE)

*Attached hereto is a signed certified copy of our **notarised** Joint Venture Agreement. Our failure to submit the copy with our tender document will lead to the conclusion that there is no joint venture agreement, and as such, our bid will be disqualified*

(Attach the notarised joint venture agreement here)

17. QUALITY EVALUATION SCHEDULE: KEY PERSONNEL ASSIGNED TO THE WORK

The Bidder shall list below the personnel that he intends to utilize on the Works, including key personnel that may have to be brought in from outside if not available locally. The proposed personnel cannot be replaced without an approval of the employer.

Insert in the table below the key personnel and their proposed function

KEY PERSONNEL SCHEDULE

NO.	KEY PERSON NAME	PROPOSED FUNCTION	PROFESSIONAL REGISTRATION	YEARS OF EXPERIENCE
1.				
2.				
3.				
4.				

17.1: EXPERIENCE OF PROJECT TEAM AND DELIVERABLES

PROJECT TEAM CVS

The experience of each key person, relevant to the scope of work, will be evaluated from three different points of view:

- 1) General experience (total duration of professional activity), in the specific sector, field, subject, etc. which is directly linked to the scope of work;
- 2) Qualifications in the relevant field or sector; and
- 3) Professional registration with a professional body in the specific sector, field, subject, etc., which is directly linked to the scope of work.

A CV of each key person of **not more than three**

(3) pages should be attached to this schedule.

Each CV should be structured under the following

headings:

- 1 Personal particulars
 - name
 - date and place of birth
 - place (s) of tertiary education and dates associated therewith
 - professional awards
- 2 Qualifications (degrees, diplomas, certificates, grades of membership of professional societies and professional registrations)
- 3 Name of current employer and position in enterprise
- 4 Overview of post graduate / diploma experience (year, organization and position)
- 5 Outline of recent assignments /

experience that has a bearing on the scope

of work The scoring of the experience of key

staff will be as follows as detailed in Table 1

to 3 above.

The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

Signed

Date

.....

.....

Name

Position

.....

.....

Bidder

(CVs, certified copies of qualifications and professional registration of the above personnel to be attached here).

17.2: FIRM'S EXPERIENCE ON SIMILAR PROJECTS

The Bidder shall provide details of his relevant experience on similar scale projects above implemented in the past 5 years. In support tenderers are to complete the "Project Experience" schedule below and attach thereto copies of (a) Letters of Appointment, and (b) one or all the relevant Completion Certificates.

PROJECT NAME	BRIEF PROJECT DESCRIPTION	Client Details			PROJECT VALUE (Including VAT)	START DATE	COMPLETION DATE
		Name	Telephone	Email			
A							
B							
C							
D							
E							

THE CONTRACT

18. Agreements and Contract data

- 18.1 Contract data
- 18.2 Special Conditions of Contract

18.1 Contract Data

This services contract is based upon the **PROCSA Standard Professional Services Contract** (latest edition) and service providers are advised to read it in order to understand the implications. Any amendments to the standard agreement will be issued when required for specific projects.

18.1.1: SCOPE OF SERVICES

18.1.1.1 Employer's objectives

The objective of this tender is to invite and appoint suitable and capable Professional Service Providers that can provide and maintain a professional service to the North West Housing Corporation (NWHC) in respective panel for the North West Office in order to speedily and successfully implement the design, construction administration and closeout of various projects, i.e., designing, contract supervision / management and closing out the projects.

The Service Provider shall provide **"NORMAL" professional services as detailed in the Government Gazette of each discipline, where applicable** and any other services related to the scope of work in the built environment which may reasonably be required for the successful completion of property development projects.

The Service Provider shall provide suitably qualified, registered and experienced personnel to undertake assignments relating to the delivery of the project/s as set out below as and when required during the Period of Performance.

Consultants will be appointed for stages 1 – 6, and will be expected to perform all activities and submit all deliverables as described in the Government Gazette for each discipline, unless otherwise instructed in writing by the employer to exclude some.

The Professional service Providers will be appointed in the respective panels for a period up to 29 March 2020, after which, new panels would be formed.

18.2 General Requirements

18.2.1 Scope of Services

The Services required shall generally be all **"Normal Services"** as defined in the Government Gazette/s, unless otherwise reduced in writing.

Service providers are required to appoint and pay at least 1 intern per project awarded.

18.2 .2 NOTES TO BIDDERS

This section outlines basic requirements that must be met. Failure to comply with these requirements or part thereof will result in your proposal being excluded from the evaluation process.

- a) This Request for Proposals (RFP) does not constitute an offer or recommendation to enter into such transaction.
- b) Being in a panel does not guarantee any work.
- c) The NWHC reserves the right to amend, modify or withdraw this RFP if deemed necessary.
- d) Companies appointed in panels will be invited to submit quotes as and when projects become available.
- e) Neither the NWHC nor any of their respective directors, officers, employees, agents, representatives or advisors will assume any obligation for any costs or expenses incurred by any party in or associated with preparing or submitting a bid in response to the expression of interest.
- f) The NWHC and its advisors may rely on a Bid as being accurate and comprehensive in relation to the information and proposals provided therein by the Bidders.
- g) All Bids submitted to the NWHC will become the property of the NWHC and will as such not be returned to the Bidder unless if received after the closing date and time. The NWHC will make all reasonable efforts to maintain bids in confidence. Proprietary information should be identified as such in each bid.
- h) Evaluation of tenders will be carried out by a Tender Evaluation Committee (TEC). The Evaluator(s) will, if necessary, contact Bidders to seek clarification of any aspect of the tender.
- i) The validity period of this tender is ninety (90) days from the closing date.
- j) Bidders should identify any work they are currently carrying out or competing for which could cause a conflict of interest, and indicate how such a conflict would be avoided.
- k) This document is confidential and should not be distributed to any non-bidding party without the proper authorization of the NWHC.
- l) This document is released for the sole purpose of responding to this RFP and must be considered confidential. In addition, the use, reproduction or disclosure of the requirements, specifications or other material in this RFP is strictly prohibited.
- m) All bids must be formulated and submitted in accordance with the requirements of this RFP.
- n) Consortiums/Joint ventures are encouraged; however, the transfer of skills and partnerships should be demonstrated in the proposals.
- o) The Bidder should demonstrate how it intends assisting in building the capacity of the local community and how it will transfer skills to such persons.
- p) Please note that Tender Offer is synonymous to Request for Proposals in this document
- q) Service providers who are blacklisted by any statutory body will, under no circumstances, be considered for this project/s

DISCLAIMER

The NWHC reserves the right not to appoint a service provider and is also not obliged to provide reasons for the rejection of any proposal.