



social development

Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Private Bag X901, Pretoria, 0001

Enquiries: D Mogotsi, Tel No: (012) 312 7537, Email: DineoD@dspd.gov.za

Sir/Madam

**THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A DESIGN EVALUATION ON LINKING
SOCIAL PROTECTION BENEFICIARIES TO SUSTAINABLE LIVELIHOOD OPPORTUNITIES**

1. Tender No: **SD04/2023**
2. Closing Date: 22 September at 11:00
3. The following documents form part of this invitation for a proposal:
 - SBD1: Invitation to bid
 - SBD3.3: Pricing Schedule
 - SBD4: Declaration of Interest
 - SBD6.1: Preference points Claim Form
4. **All the documents accompanying this invitation must please be completed in detail, where applicable and returned with your Bid.**
5. Please make sure that your bid reaches this office before the closing time and date
6. When submitting your bid the following information must appear on the sealed envelope:
 - i. Name and address of the Bidder
 - ii. Bid number
 - iii. Closing Date
7. This envelope can be placed in the Bid box in the foyer at HSRC Building, 134 Pretorius Street, Pretoria

Kind regards

DIRECTOR: SUPPLY CHAIN MANAGEMENT

DATE: 31/08/2023



social development

Department:
Social Development
REPUBLIC OF SOUTH AFRICA

P.O. Box X 901, Pretoria, 0001, 134 Pretoria Street, HSRC Building, Pretoria

Tel: (012) 312 7577 Fax: (012) 312 7041, EmmaTa@dsd.gov.za

TERMS OF REFERENCE

THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A DESIGN EVALUATION ON LINKING SOCIAL PROTECTION BENEFICIARIES TO SUSTAINABLE LIVELIHOOD OPPORTUNITIES

1. PURPOSE

Terms of Reference to appoint a service provider to conduct a *Design Evaluation on Linking Social Protection Beneficiaries to Sustainable Livelihood Opportunities*.

2. PROJECT NAME

A Design Evaluation on Linking Social Protection Beneficiaries to Sustainable Livelihood Opportunities.

3. INTRODUCTION

Recent studies have outlined various challenges in South Africa (SA) such as poverty, lack of access to services, unemployment, inequality, lack of skills and social exclusion. In this regard, Department of Social Development (DSD) has a constitutional mandate to provide Social Protection services, which ensures that poor and vulnerable communities do not fall below the poverty line.

Social Protection in the form of Social Grants has become one of the measures to fight against poverty and has gained positive outcomes in South Africa. Social grants have succeeded to mitigate the negative impact of poverty, and ensuring the well-being of the vulnerable and marginalized. However, due to unemployment and lack of empowerment opportunities social grant beneficiaries are unable to adequately meet their personal and household needs. Thus, continue to face barriers that prevent them to access available opportunities that would

mitigate poverty, unemployment and improve the total well-being of the family/household. As a developmental state, there is greater need to have developmental programmes as part of empowering vulnerable and poor citizens.

Hence, social protection is not only limited to income consumption or protection of the poor through the provision of cash transfers and other safety net measures, but is a powerful tool for livelihood promotion and long-term social protection and investment. There is a myriad of social protection systems such as Child Support Grant (CSG), Disability grants and recently R350 Social Relief of Distress (SRD) grant, targeting beneficiaries between 18 and 59 years. There are also vulnerable group benefitting from Nutrition and Feeding programs. Thus, empowerment is required and skills for poor and vulnerable communities to participate in the economic and developmental strategies.

Various deprived communities have implemented different activities for survival (e.g. small businesses, agriculture etc.), these strategies have not been explored to establish the extent to which they can contribute towards sustaining their livelihoods. Thus, it is very critical for an adoption of an approach that links directly to other long-term livelihood development policies and programmes.

4. BACKGROUND

The Linking of Social Protection Beneficiaries to Sustainable Livelihoods Opportunities is not a new phenomenon within Social Development. A study was conducted around this subject in Dutyini Village, Eastern Cape Province during September 2005-May 2006.” Its objective was to restore participants to self-reliance through linking their social grants to livelihoods and cooperatives”. The outcome of the study provided a basis for the need to engage social grants beneficiaries to other developmental programs with a view to strengthen their livelihoods strategies.

Furthermore, it is very critical to note that social grants and other social protection avenues have contributed tremendously towards mitigating the negative impact of poverty and unemployment, but they are not long-term solution to poverty eradication. The social protection system was not initially designed with strategies to connect beneficiaries to other opportunities, other than a change in their living circumstances and income levels. As such, proactive strategies and programs to link social grant beneficiaries to opportunities for poverty alleviation, economic activity and sustainable livelihoods are very critical in this regard. A livelihood is defined as sustainable, when it can cope with and recover from stresses, shocks

and maintain or enhance its capabilities and assets both now and in the future (Toolkit for CDPs, 2009).

It is against this background that the Chief Directorate; Poverty Alleviation, Sustainable Livelihoods, Food & Nutrition Security developed a Framework on “Linking Social Protection Beneficiaries to Sustainable Livelihoods Opportunities”. The main aim of the Framework is to “Empower and Strengthen the Income, Assets and Capabilities of vulnerable people to achieve sustainable Livelihoods”.

Government’s current priority is putting a concerted effort on the idea of “Sustainable Livelihoods” as a developmental, transformative and capability-focused policy response to poverty, inequality and vulnerability towards beneficiaries of social protection programs as well as those eligible but not benefitting.

This brief background provides a basis for DSD through the Chief Directorate; Poverty Alleviation, Sustainable Livelihoods, Food & Nutrition Security to conduct “A Design Evaluation Study on Linking Social Protection Beneficiaries to Sustainable Livelihood Opportunities”. The main purpose of the Design Evaluation Design Evaluation is to ensure that Linking Social Protection Beneficiaries to Sustainable Livelihood Opportunities programme is well designed and robust with workable solutions.

4.1 Problem Statement

SA has one of the 10th largest cash transfer programmes internationally, with approximately 18,677,339 social grants paid to 11,603,840 beneficiaries dated March 2022. At least two out of three households receive a grant or a third of the population. The August 2022 data from SASSA showed that regarding the Covid-19 SRD Grant, 57% of applicants were female and male making 43% respectively. With regards to the age groups, those below 20 constituted 8%, 20-24 made up 19% of the applicants followed by the 25-29 at 17% and finally the 30-35 at 17% respectively. If these youth age groups combined, they made up 61% of the grant applications (SASSA, 2022).

Unemployment still skewed along racial lines in South Africa, the Black African and Coloured populations experience joblessness more compared to other races. In the 1st quarter of 2022, the official unemployment rate for Black Africans of all age groups was at 38,6%, the Coloured population at 25,9% while the Asian/Indian stood at 17,1% followed by the Whites at 10,0% (Statistics SA, 2022).

However, there are public employment programmes such as the Expanded Public Works Programme (EPWP) and Community Work Programme (CWP), which assists those who would have had challenges securing jobs on their own. This means that the current policies in place are not resulting in the desired outcomes of long-term sustainability of livelihoods of vulnerable people. Based on the evidence in place, particularly people below the age of 60 are dependent on social grants for their livelihoods. Hence, it is extremely necessary to strengthen partnerships, resources, as well as explore opportunities for vulnerable people to enhance their livelihoods.

4.1.1 Overview of what is happening in Provincial DSD

National Department of Social Development (NDSD) provides support to various provinces to implement the different interventions outlined below:

- a) **Gauteng (GP): Welfare to Work** where there is evidence that, “more than 80% registered beneficiaries complete the accredited skills training programme successfully and 70% of the graduates start their own businesses and create employment for others or are employed within the sectors for which they have been trained”.
- b) **Northern Cape (NC): Developmental Programs with Community Nutrition Development Centre (CNDC) Beneficiaries** "where they are involved in the following: Life Skills, Prevention and Awareness, Social Cohesion /Nation Building, Technical Skills development with various partners.
- c) **Other provinces** are in the process of institutionalising linkages of Social Protection Beneficiaries to Sustainable Livelihoods Opportunities.

5. STUDY APPROACH

The Theory of Change will form the conceptual framework for the study as well as a systems approach.

5.1 Purpose of evaluation

To collect empirical evidence to ensure that Linking Social Protection Beneficiaries to Sustainable Livelihood Opportunities programme is well designed and robust with workable solutions.

5.3 Proposed methodology

This is a design evaluation, which will require a mixed method approach with qualitative and quantitative datasets. It will require the collection of primary data from identified respondents, review of documents and analysis of secondary data. Document review will include policies, Community Development Norms and Standards, Community Development Practitioner's Toolkit, Framework for Linking Social Protection Beneficiaries to Sustainable Livelihood Opportunities, Community Development Policy, Facilitation Guideline for Sustainable Livelihood Interventions, reports and any other documents related to Sustainable Livelihoods Programme. To gather the primary data from purposefully selected respondents (programme managers, beneficiaries and other key stakeholders), the service provider may use interviews, semi-structured interviews, key informant interviews and focus group discussions.

Note: *though an evaluation approach has been suggested, this does not preclude a service provider from recommending a different methodological approach considered more responsive or more innovative. Should a service provider apply the approach provided in the TORs, the service provider will be expected to propose a detailed methodology and innovation and creativity in this regard will be an added advantage*

6. SCOPE OF THE PROJECT

The Design evaluation on Linking Social Grant Beneficiaries to Sustainable Livelihood Opportunities should respond to the following scope of work:

- 6.1 The data will be reviewed from **2023/2024 and 2024/2025** financial years.
- 6.2 The evaluation scope will cover all **nine (9) Provinces**.
- 6.3 Review of documents will include but not limited to any existing policies, legislation, monitoring and evaluation reports, financial reports, Community Development Norms and Standards, Community Development Practitioner's Toolkit and Framework for Linking Protection Beneficiaries to Sustainable Livelihood Opportunities, Community Development Policy, Facilitation Guideline for Sustainable Livelihood Interventions and any other documents pertaining to Sustainable Livelihood Programme.
- 6.4 Collection of primary data through interviews, focus group discussions, key informant interviews with respondents (programme managers, beneficiaries and other key stakeholders).
- 6.5 Conduct a Theory of Change and Logical Framework workshop
- 6.6 Conduct Roundtable discussions with various stakeholders from different sectors including academia and civil society to share various research/evaluation studies.

- 6.7 Conduct an analysis of needs of social protection beneficiaries who are benefitting from DSD programmes.
- 6.8 Determine what different sectors are available to link social protection beneficiaries to livelihood opportunities.

7. DELIVERABLES

This is a project of over two (2) financial years (2023/2024-2024/2025).

ITEMS	Expected Milestone
Submission and presentation of inception report , include the project plan, key evaluation questions, proposed sampling, methodology including capacity development plan	End October 2023
Draft Literature Review Report	On going
Roundtable session and report Theory of Change workshop and report Final data collection instruments Field work strategy and analysis plan	End November 2023
Conduct data collection in six (6) provinces	November 2023-March 2024
Produce a fieldwork report for six (6) provinces	March 2024
Conduct data collection in three (3) provinces	April 2024-June 2024
Produce a final fieldwork report for 9 provinces	End August 2024
Draft report and Validation workshop report	End September 2024
Submission of approved final evaluation reports both full and short report in 1/5/25 format, all datasets and data collection documentation (including interviews)	End October 2024
Project closure meeting	November 2024

8. INTENDED USERS OF THE EVALUATION

Stakeholder	Likely use of the results
National Department of Social Development	To strengthen coordination and develop policies related to sustainable livelihood
Provincial Department of Social Development	To improve service delivery To effectively implement the program on Social Protection Beneficiaries to Sustainable Livelihoods Opportunities at community level.
SASSA	Coordinate in terms of development of Policies that go beyond Social Security.

Department of Public Works	Partnership regarding opportunities available within the Public Employment Programs.
International Labour Organisations	To strengthen policies and standards
Finmark Trust	Implementation Partner
Academic Institutions	To contribute with continuous research which will provide empirical evidence on the outcomes and areas of improvement in the implementation of this program.
World Bank	To strengthen financial support
Dept. Cooperative Governance	They will use for planning purposes and policy development
Community Development Practitioners	To improve service delivery
NPOs/CBOs	To improve service delivery
Civil society Organizations	To plan and implement appropriate activities to enhance and maintain their livelihoods
Cooperatives	To strengthen coordination
National Treasury	To strengthen policy and financial support

9. GENERAL CONDITIONS

9.1. The general conditions of contract as prescribed by National Treasury will be applicable in all instances.

10. TIME FRAMES

The duration of the study will be twenty four (24) months.

11. SKILLS, KNOWLEDGE AND EXPERIENCE REQUIRED

The team contained in the proposal must be available for the duration of the project. Replacement of team members may only be done in consultation with DSD and replacement team members must have the same qualifications, skills and experience as those they are replacing. The evaluation requires a combination of skills and expertise. The team should have a Community development expert, M&E expert, and project manager. The proposed sector (community development) and M&E specialists must have formal qualifications in their respective areas of expertise at least at honours level. The service provider should clearly specify the number of evaluators to be part

of the team, their areas of expertise and their respective responsibilities. The team must possess relevant qualification(s), including at least a Postgraduate Degrees. The service provider must have:

- a) Knowledge of Social Development sector's core mandate, policies and programmes as informed by its key priorities.
- b) Experience in conducting evaluation and research on government programmes and policies, research and policy development.
- c) Project and Financial Management.
- d) Good verbal and written communication for stakeholder management
- e) Ability to gather data, to compile information, and prepare reports
- f) Knowledge of how community development programme contribute towards service delivery;

The bidder must also provide the following:

- a) A response to the terms of reference;
- b) A project plan that states the methodology and approach for accomplishing the task, project phases if applicable, time frames and outputs (excluding cost for the project);
- c) Profile of the organisation and description of similar work undertaken;
- d) Capacity Development Plan
- e) Numbers, names and CV's of workers/ consultants assigned to the project, including their roles and responsibilities, experience on the issues relating to DSD sector;
- f) Letter of authority to sign documents on behalf of the organisation; and
- g) One hard copy of the technical proposal and a USB with soft copy of the technical proposal in PDF format.

12. BID PROPOSAL

The comprehensive proposal submission should include:

- 12.1 A detailed plan reflecting project time frames, costing and outputs.
- 12.2 Profile of company including a description of similar work undertaken.
- 12.3 Number, names and resumes (abbreviated CVs) of the person assigned in the project.
- 12.4 A summary of the roles, responsibilities and time spent by each person.
- 12.5 The cost structure should be inclusive and as detailed as possible.

- 12.6 The service provider is expected to enter into contract with DSD based on the proposal.
- 12.7 A work plan indicating time frames should be provided with proposal.
- 12.8 Progress will be monitored monthly based on the work plan and time frames provided by the service approved by the DSD.

13. PROPRIETARY RIGHT

- 13.1 The DSD shall become the owner of the information, documents, advice and reports collected and compiled by the service provider to be appointed.
- 13.2 The copyrights of all documents and reports compiled by the service provider will vest in the DSD and may not be produced, distributed or made available without the consent and approval of the DSD.
- 13.3 All information, documents and reports must be regarded as confidential until made public by the DSD.

14. EVALUATION CRITERIA

- 14.1 The evaluation of the bids will be conducted in three stages:
 - a) Firstly, the proposals will be evaluated on functionality. An evaluation panel will allocate points (scale 1-5) in respect of functionality according to the criteria set-up in paragraph 16.5. proposals scoring less than 70% in respect of functionality will be disqualified and not be evaluated further.
 - b) Thereafter, only the qualifying bids will be evaluated in terms of the 80/20 preference points system as contemplated in the Preference Procurement Regulations 2022.
 - c) The 80 points will be used to calculate price only and the 20 points will be awarded to a supplier for specific goals per SBD 6.1. Included in this tender. Bidders are required to submit certified copies of proof for the preference points claimed for specific goals.
- 14.3 The points in respect of price will be calculated on the ceiling price for the project (inclusive of the professional fees, travel and subsistence cost, as well as VAT).
- 14.4 PLEASE NOTE: SBD 6.1 attached for claiming above-mentioned points, if not completed the bidder will automatically score 0 points.
- 14.5 Technical proposals will be evaluated on a scale of 1-5 in accordance with criteria below.
- 14.6 All bids/quotes will be scored as follows against the functional criteria indicated below. The rating will be as follows:

EVALUATION MATRIX

No.	ELEMENT/CRITERIA	1	2	3	4	5	Weight	Total
1.	Demonstrates extensive knowledge and experience in conducting evaluation studies by main contractor and subcontractors 1= No evidence that bidder has undertaken similar projects. 2= Bidder has successfully undertaken 1 or 2 similar projects. 3= Bidder has successfully undertaken 3 projects. 4= Bidder has successfully undertaken 4 similar projects. 5= Bidder has successfully undertaken 5 or more similar projects.						25	
2.	Bidder's profile reflects an in-depth understanding, knowledge and experience of the social development sector's core mandate, policies and programmes as informed by its key priorities; and can appropriately relate evaluation of Sustainable Livelihood Programme to the current political, policy and governance environments. 1= Profile does demonstrate any of the required qualities. 2= Profile makes mention of the required qualities but not convincing. 3= Profile demonstrates a minimum of the required qualities. 4= Profile demonstrates most of the required qualities. 5= Profile exceeds of the required qualities.						25	
3.	Proposed methodology and approach 1= Proposal did not meet methodology requirements set out in the TOR 2= Proposal partially addresses methodology requirements set out in the TOR 3= Proposal meets minimum methodology requirements set out in the TOR 4= Proposal exceeds minimum methodology requirements set out in the TOR 5= Proposal exceeds minimum methodology requirements set out in the TOR and proposed value-add items such as interesting approach for undertaking the project						20	

4.	Skills, knowledge and experience (as specified in ToRs) 1= Team does not meet any skills, knowledge and experience requirements. The sector and M&E specialists meet at least half but not all the qualifications requirements 2= Team consist of either sector expert or M&E expert and the project manager. 3= Team consist of sector expert on community development, M&E expert and project manager. The sector and M&E specialists meet the minimum qualifications 4= Team consist of sector expert on community development, M&E expert and project manager. Either sector or M&E specialists exceed the qualifications requirements. 5= Team consist of sector expert on community development, M&E expert and project manager. Both sector and M&E specialists exceed the qualifications requirements.						20	
5.	A skills transfer plan that demonstrates how at least two officials from national DSD and relevant DSD officials and provincial offices. 1=No Skills transfer plan demonstrating how at least two officials from national DSD and relevant DSD officials and provincial offices. 2= Proposed skills transfer plan partially demonstrates how at least two officials from national DSD and relevant DSD officials and provincial offices. 3=Proposed skills transfer plan demonstrates how at least two officials from national DSD and relevant DSD officials and provincial offices. 4= Proposed skills transfer plan demonstrate how at least 4 or more officials from national DSD and relevant DSD officials and provincial offices. 5= Proposed skills transfer plan demonstrate how at least 4 or more officials from national DSD and relevant DSD officials and provincial offices. The proposal add some innovation on how the skills transfer plan will be implemented.						10	
	TOTAL						100	

Minimum requirement: Service providers should be required to meet the minimum scores for each element as well as the overall minimum score (70%), based on the

average of scores awarded by the evaluation panel members. Proposals should clearly address the project description and the functional evaluation criteria mentioned above.

15. FACILITIES TO BE PROVIDED BY THE DSD

- 15.1 During the project the DSD officials will make themselves available for clarity, reporting processes, discussions and meetings. The service provider will also have access to required documents and other records available within the Department that may assist in executing the project.

16. REPORTING ARRANGEMENT

- 16.1 All deliverables should be submitted to the DSD. Any deliverable submitted and not accepted must be reworked and resubmitted at no additional cost.
- 16.2 The service provider will provide a single overall project manager.
- 16.3 A comprehensive monthly report will be submitted by the service provider.
- 16.4 The service provider must also submit monthly statistics to the DSD.

17. TARIFFS AND PAYMENT

- 17.1 Payment will be effected within 30 days after receipt of a stationery detailed invoice from the successful service provider.
- 17.2 Payment will be made in accordance with the completion of work to the satisfaction of the DSD based on the milestone for the project agreed to and signed off as part of the implementation plan.
- 17.3 Logistics for Validation workshop expenses will be incurred by the DSD.

18. SUBMISSIONS

- 18.1 Prospective bidders must submit their bids proposals in **two envelopes**:
- 18.2 **One envelope** with the **technical proposal** outlining in detail a realistic work-break schedule indicating different milestones to be achieved, and response to the terms of reference and evaluation criteria including other supportive documents, completed bid forms, tax clearance certificate issued by SARS and legal entity registration certificate.

- 18.3 One **other envelope** with the **financial proposal** (pricing schedule (SDB 3.3) with all cost related items, cost breakdown).
- 18.4 The entire proposal should be placed on disc in a PDF format.
- 18.5 The following information must be endorsed on each envelope:
- Bid number:
 - Closing date:
 - Name of the Bidder:
 - Technical Proposal or financial Proposal
- 18.6 The closing date for the submission of bid is
- 18.7 Failure to comply with these conditions will result in a bid being disqualified.
- 18.8 The Bids should be:
- Deposited in the Tender Box,
Foyer of the HSRC Building
134 Pretorius Street
Pretoria
- 18.9 Bids received after closing date and time will be regarded as late and will not be evaluated

19. SIGNING OF CONTRACT

It will be expected of the successful service provider to sign a formal contract with the Department of Social Development.

20. CONTACT PERSONS

Enquiries may be directed to:

Directorate: Supply Chain Management

Mr Zolisa Mantantana

Tel No: 012 312 7463

Email: ZolisaM@dsd.gov.za

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NATIONAL DEPARTMENT OF SOCIAL DEVELOPMENT)					
BID NUMBER:	SD04/2023	CLOSING DATE:	22 September 2023	CLOSING TIME:	11:00
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A DESIGN EVALUATION ON LINKING SOCIAL PROTECTION BENEFICIARIES TO SUSTAINABLE LIVELIHOOD OPPORTUNITIES				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).					

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX
SITUATED AT HSRC Building, 134 Pretorius Street, Pretoria

SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
		TCS PIN:		OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]		<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	
		<input type="checkbox"/> No			
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX		<input type="checkbox"/> AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
		<input type="checkbox"/> A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
		<input type="checkbox"/> A REGISTERED AUDITOR			
		NAME:			

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMEs & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ANSWER PART B:3 BELOW]
SIGNATURE OF BIDDER		DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)			
TOTAL NUMBER OF ITEMS OFFERED			
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:		TECHNICAL INFORMATION MAY BE DIRECTED TO:	
DEPARTMENT/ PUBLIC ENTITY		CONTACT PERSON	
CONTACT PERSON		TELEPHONE NUMBER	
TELEPHONE NUMBER		FACSIMILE NUMBER	
FACSIMILE NUMBER		E-MAIL ADDRESS	
E-MAIL ADDRESS			

PART B

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:	
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.	
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR ONLINE	
1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.	
1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.	
1.5. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.	
2. TAX COMPLIANCE REQUIREMENTS	
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.	
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.	
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.	
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.	
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.	
2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.	
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.	

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

PRICING SCHEDULE
(Professional Services)

BID NO: SD04/2023 CLOSING TIME 11:00 ON 22 September 2023

NAME OF SERVICE PROVIDER:

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <u>VAVULE ADDED TAX</u>
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THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A DESIGN EVALUATION ON LINKING SOCIAL PROTECTION BENEFICIARIES TO SUSTAINABLE LIVELIHOOD OPPORTUNITIES

1. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION

HOURLY RATE

DAILY RATE

-----	R-----	-----
-----	R-----	-----
-----	R-----	-----
-----	R-----	-----
-----	R-----	-----

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

-----	R-----	----- days
-----	R-----	----- days
-----	R-----	----- days
-----	R-----	----- days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	R.....
-----	R.....
-----	R.....
-----	R.....

TOTAL: R.....

Name of Bidder:

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....

TOTAL: R.....

6. Period required for commencement with project after acceptance of bid
 7. Estimated man-days for completion of project
 8. Are the rates quoted firm for the full period of contract? *YES/NO
 9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

Any enquiries regarding bidding procedures may be directed to the –

Ms. Z Mantantana
 Email ZolisaM@dsd.gov.za

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

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

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

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

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

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

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

1. GENERAL CONDITIONS

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

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

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) The **80/20 preference point system** will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

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

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

3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

- Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is

applicable, corresponding points must also be indicated as such.

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Organisations which are 51% owned black people who are women	5	
Organisations which are 51% owned black people which are youth	5	
Organisations which are 51% owned by black people living in rural or underdeveloped areas or townships	5	
Organisations which are owned by People with disabilities	5	

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm,

certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

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

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....