



**social development**

Department:  
Social Development  
REPUBLIC OF SOUTH AFRICA

Private Bag X901, Pretoria, 0001

Enquiries: A. Mbodla, Tel No: (012) 312 7653, Email: [AndiswaM@dsd.gov.za](mailto:AndiswaM@dsd.gov.za)

Sir/Madam

#### TERMS OF REFERENCE

**FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR EDITING, DESIGN, LAYOUT AND PRINTING OF THE DSD & CDA ANNUAL REPORTS, DSD STRATEGIC PLAN, DSD OPERATIONAL PLANS AND DSD ANNUAL PERFORMANCE PLANS, EDUCATIONAL OUTCOMES OF LEARNERS RECEIVING SOCIAL PROTECTION REPORTS, SOCIAL BUDGET BULLETIN & KEY STATISTICS FOR SOCIAL DEVELOPMENT TRENDS REPORTS FOR A PERIOD OF THREE (3) YEARS**

1. Tender No: **SD01/2024**
2. Closing Date: 13 Dec 2024 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: 22/11/2024

## PART A INVITATION TO BID

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)**

BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
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DESCRIPTION
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**BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO**

**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

CONTACT PERSON	CONTACT PERSON
TELEPHONE NUMBER	TELEPHONE NUMBER
FACSIMILE NUMBER	FACSIMILE NUMBER
E-MAIL ADDRESS	E-MAIL ADDRESS

**SUPPLIER INFORMATION**

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No

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

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<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 THE QUESTIONNAIRE BELOW ]
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**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<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 REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

## PART B

### TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE <a href="http://WWW.SARS.GOV.ZA">WWW.SARS.GOV.ZA</a> .
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....  
(Proof of authority must be submitted e.g. company resolution)

DATE: .....



**PRICING SCHEDULE**  
(Professional Services)

BID NO: SD01/2024

CLOSING TIME 11:00 ON 13 Dec 2024

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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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-----

-----

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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.....

Bid No.: .....

Name of Bidder: .....

.....	.....	R.....
.....	.....	R.....
TOTAL: R.....		

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 –

Mr. Zolisa Mantantana  
Email: [ZolisaM@dsd.gov.za](mailto:ZolisaM@dsd.gov.za)

## SBD 4

## DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
  - the bidder is employed by the state; and/or
  - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
  - 2.1 Full Name of bidder or his or her representative: .....
  - 2.2 Identity Number:.....
  - 2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>, member): .....
  - 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust: .....
  - 2.5 Tax Reference Number: .....
  - 2.6 VAT Registration Number: .....
  - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

<sup>1</sup>"State" means –

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

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

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

2.7.1 If so, furnish the following particulars:

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

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

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

Any other particulars:

.....

.....

.....

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

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

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

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

.....

.....

.....

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

2.8.1 If so, furnish particulars:

.....

.....

.....

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

2.9.1 If so, furnish particulars.

.....



2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

2.10.1 If so, furnish particulars.

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

**YES/NO**

2.11.1 If so, furnish particulars:

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

[illegible]



**4 DECLARATION**

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

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

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

November 2011

## 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**

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 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	
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 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	
Organisation which are 51% owned by black people living in rural or underdeveloped areas or townships	5	
Entities 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:** .....

.....

.....

.....



## **TERMS OF REFERENCE**

**FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR  
EDITING, DESIGN, LAYOUT AND PRINTING OF THE DSD &  
CDA ANNUAL REPORTS, DSD STRATEGIC PLAN, DSD  
OPERATIONAL PLANS AND DSD ANNUAL  
PERFORMANCE PLANS, EDUCATIONAL OUTCOMES OF  
LEARNERS RECEIVING SOCIAL PROTECTION REPORTS,  
SOCIAL BUDGET BULLETIN & KEY STATISTICS FOR  
SOCIAL DEVELOPMENT TRENDS REPORTS FOR A  
PERIOD OF THREE (3) YEARS**

**22 November 2024**

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## 1. Invitation

The Department of Social Development wishes to identify and appoint a service provider to provide a high quality and deadline driven printing services for a period of three (3) years. The scope of the project includes Editing, Design, Layout and Printing of the DSD & CDA Annual Reports, DSD Strategic Plan, DSD Operational Plans and DSD Annual Performance Plans, Educational Outcomes of Learners Receiving Social Protection Reports, Social Budget Bulletin & Key Statistics for Social Development Trends Reports for a period of three (3) years.

## 2. Introduction and background

### 2.1. Core function of the Department

The core functions of the DSD include among others, management and oversight over social security, encompassing social assistance and social insurance policies that aim to prevent and alleviate poverty in the event of life cycle risks such as loss of income due to unemployment, disability, old age or death occurring.

Furthermore, the Department provides developmental social welfare services that provide support to reduce poverty, vulnerability and the impact of HIV and AIDS through sustainable development programmes in partnership with implementing agents such as State-funded institutions, Non-Governmental Organisations (NGOs), Community-Based Organisations (CBOs) and Faith-Based Organisations (FBOs).

### 2.2. Public entities reporting to the Minister

The South African Social Security Agency (SASSA) is listed as a Schedule 3A public entity in terms of the Public Finance Management Act, 1999 (Act No. 1 of 1999). The agency was established in terms of the South African Social Security Agency Act of 2004 (Act No. 9 of 2004).

The National Development Agency (NDA) is listed as a Schedule 3A public entity in terms of the Public Finance Management Act, 1999 (Act No. 1 of 1999) and is accountable to the Minister of Social Development. The NDA was established in terms of the National Development Agency Act, 1998 (Act No. 108 of 1998), which replaced the Transitional National Development Trust (TNDT).

The Central Drug Authority (CDA) was established under Section 2 of Prevention of and Treatment for Substance Abuse Act, 2008 (Act No. 70 of 2008).

### 3. Purpose of the Terms of Reference

#### **Purpose**

The purpose of these terms of reference is for the appointment of a service provider for Editing, Design, Layout and Printing of the DSD & CDA Annual Reports, DSD Strategic Plan, DSD Operational Plans and DSD Annual Performance Plans, Educational Outcomes of Learners Receiving Social Protection Reports, Social Budget Bulletin & Key Statistics for Social Development Trends Reports for a period of three (3) years as per invitation in Paragraph 1.

#### **Project name**

Editing, Design, Layout and Printing of the DSD & CDA Annual Reports, DSD Strategic Plan, DSD Operational Plans and DSD Annual Performance Plans, Educational Outcomes of Learners Receiving Social Protection Reports, Social Budget Bulletin & Key Statistics for Social Development Trends Reports for a period of three (3) years.

#### **Background**

The Department produces planning and reporting documents in the form of **Strategic Plans** (SP), **Annual Performance Plans** (APP), **Operational Plans** (Ops Plan) and **Annual Reports** (AR). The production of the SP is the first activity of the planning process whereas the production of the APP and OPS Plans are the last activities in the planning process and are completed prior to the publication and tabling of the APP in Parliament. Similarly, the production of the AR is completed at the end of each financial year in preparation for submission of the report to relevant stakeholders and tabling in Parliament. The production of the SP, APP, Ops Plan and the AR are Legislative requirements with clear timelines.

A Strategic Plan sets out the Department's policy priorities, programmes and project plans for a five-year period, as approved by the Executive Authority. It focuses on strategic outcomes oriented goals for the Department as a whole, and objectives for each of the service-delivery areas aligned to the budget programmes and budget sub-programmes.

The APP sets out what the Department intends to achieve in the upcoming financial year and during the Medium Term Expenditure Framework (MTEF) to implement its Strategic Plan. It sets out performance indicators, annual targets and quarterly targets for budget programmes and sub-programmes to facilitate the realisation of goals and objectives set out in the Strategic Plan.



The AR provides information on the performance of the Department in the preceding financial year for the purposes of oversight. It looks at the institution's performance relative to the targets set in the APP and provides the audited annual financial statements. It reveals how the budget was implemented and shows the state of the Department's financial management systems. The AR further includes relevant general information and human resource management statistics and administrative data series.

Social Budget Bulletin is a tool that systematically reports, analyse and review social expenditure across in order to assess the extent to which the country is moving towards the realisation of its constitutional mandate. This is the publication that aims to provide reliable data to inform policy analysis and dialogue in social protection policy developments in the country. The Social Budget Bulletin is Social Security data and information collated from different sources, including StatsSA, SARB, Department of Labour and the institutions in the private sector

Educational Outcomes of Learners Receiving Social Protection Reports will measure the impact of social grants and other social protection services on the educational outcomes of social grants beneficiaries. The report will generate empirical evidence which will inform programmes and policies related to social protection interventions targeting poor and vulnerable children.

Key Statistics for Social Development Trends Reports will provide information that can assist the Department of Social Development to make informed decisions based on evidence. The information can also be used in strategic, programme and project planning. The report will be shared with all DSD Provincial Departments, DSD Programme Managers, the South African Social Security Agency (SASSA), Statistics South Africa, National Development Agency (NDA) and other external stakeholders.

## 4. Scope of work and deliverables

### 4.1. Editing requirements

The editor will be required to proofread and edit the whole document: This will involve:

- Heavy editing for spelling, grammar and punctuation;
- Correct usage of language (comma splices, misplaced colons, incorrect apostrophes, typographical errors), clarity and consistency;
- Bibliographic style; verification of callouts, headings, sequence, and adherence to accuracy and completeness;
- Establish consistent use of terminology, spelling, capitalization, italics, hyphenation, abbreviations and number based on GCIS style guide;
- Correct errors of grammar, spelling and punctuation;

- Ensure that the language and form are appropriate for the intended readers, that there is a logical flow in the discussion, and that information is presented clearly and concisely;
- Simplify language where necessary (using short sentences and bullets instead of long paragraphs, use of simple words, etc.);
- Eliminate unnecessary duplication and repetitions;
- Make corrections directly onto digital copies
- Professionally proofread consolidated documents to be sent to the Department for approval.

#### 4.2. Deliverables and timeframes

<b>2025/26</b>			
<b>Product</b>	<b>Format</b>	<b>Quantity</b>	<b>Delivery Date</b>
DSD Strategic plan	Standard Report	50	31 March 2025
	Flip book	1	31 March 2025
DSD Sector Plan	Standard Report	50	31 March 2025
	Flip book	1	31 March 2025
DSD Annual Performance Plan for 2025/2026	Standard APP	100	31 March 2025
	Flip book	1	31 March 2025
DSD Operational Plan 2025/26	Standard Operational Plan	0	31 March 2025
	Flip book	1	31 March 2025
DSD Annual Report for 2024/25	Standard Report	100	28 August 2025
	Flip book	1	28 August 2025
CDA Annual Report for 2024/25	Standard Report	100	28 August 2025
	Flip book	1	28 August 2025
Educational Outcomes of Learners receiving Social protection Report	Standard Report	50	20 March 2025
	Flip book	1	20 March 2025
Key Statistics for Social Development Trends Report	Standard Report	100	20 March 2025
	Flip book	1	20 March 2025
Social Budget Publication	Standard Report	60	28 August 2025
	Flipbook	1	28 August 2025
<b>2026/27</b>			
DSD Annual Performance Plan for 2026/2027	Standard APP	100	31 March 2026
	Flip book	1	31 March 2026



DSD Operational Plan 2026/2027	Standard Operational Plan	0	31 March 2026
	Flip book	1	31 March 2026
<b>DSD Annual Report for 2025/26</b>	Standard Report	100	28 August 2026
	Flip book	1	28 August 2026
<b>CDA Annual Report for 2025/26</b>	Standard Report	100	28 August 2026
	Flip book	1	28 August 2026
Educational Outcomes of Learners receiving Social protection Report	Standard Report	50	20 March 2026
	Flip book	1	20 March 2026
Key Statistics for Social Development Trends Report	Standard Report	100	20 March 2026
	Flipbook	1	20 March 2026
<b>2027/28</b>			
DSD Annual Performance Plan for 2027/28	Standard APP	100	31 March 2027
	Flip book	1	31 March 2027
DSD Operational Plan 2027/28	Standard Operational Plan	0	31 March 2027
	Flip book	1	31 March 2027
<b>DSD Annual Report for 2026/27</b>	Standard Report	100	28 August 2027
	Flip book	1	28 August 2027
<b>CDA Annual Report for 2026/27</b>	Standard Report	100	28 August 2027
	Flip book	1	28 August 2027
Educational Outcomes of Learners receiving Social protection Report	Standard Report	50	20 March 2027
	Flip book	1	20 March 2027
Key Statistics for Social Development Trends Report	Standard Report	100	20 March 2027
	Flip book	1	20 March 2027
Social Security Review	Standard Report	100	20 March 2027
	Flip book	1	20 March 2027

The detailed specifications for each of the above deliverables are provided in Section 5 below.

## **Note on deliverables and timeframes**

### **4.3.1. Changes to the content vs timeframes**

Due to the nature of the documents to be produced, there might be changes to the content in the last minutes that would need to be accommodated and these may result in delayed and/or rushed printing timelines. Delivery dates and times are inflexible as these documents must be tabled in Parliament at specified deadlines. Flexibility in terms of staffing, working hours and contingency planning by the appointed service provider will be required in such cases, as last minute changes may need to be done on final or handed over content/artwork and this may result in delayed and/or rushed printing timelines.

### **4.3.2. Contingency planning**

Projects are often interrupted by circumstances that are beyond the service provider's control. A detailed contingency and disaster plan will be an important consideration in the awarding of the Bid. The plan should address such circumstances that may arise that are beyond the control of the service provider and what actions/measures will be taken in such events to ensure the successful completion of the projects. The following should be taken into consideration:

- Labour unrest (Strike);
- Fire;
- Power disruptions (Load shedding);
- Machinery and equipment breakdown;
- Theft;

### **4.3.3. Production and quality control**

Service providers must consider quality control during the printing, collating, binding and packaging processes. Quality control in terms of consistency in colour and finishing are of utmost importance. Information with regards to the production equipment to be used must be shared. Prospective service providers may be subjected to site inspection (especially in instances where we cannot determine the kind of equipment and software they use). Labelling need to be done, verified and applied as per the specified information provided. Products must be correctly wrapped, packaged and labelled as per project specification and delivered as per project schedules.



## 5. Specifications

### 5.1. DSD Annual report specifications

#### 5.1.1. DSD Standard Annual Report Specifications

Pages : 300 pages (back-to-back) including cover  
Paper : Cover 300gsm UV spot Varnish on the front part and flip Die-Cut  
Paper : Inside pages – 115gsm  
Quantity : 100 hard copies  
Size : A4 portrait (297mm x 210mm)  
Printing : Full colour on both sides  
Finishing : Perfect bound and thread sewn

### 5.2. CDA Annual report specifications

#### 5.2.1. CDA Standard Annual Report Specifications

Pages : 260 pages (back-to-back) including covers  
Papers : Cover 250gsm (Matt laminated)  
Papers : Inside pages – 115gsm Matt  
Quantity : 100 hard copies.  
Size : A4 portrait (297mm x 210mm)  
Colour : Full colour on both sides  
Finishing : Perfect bound

### 5.3. DSD Annual Performance Plan and Strategic Plan Specifications

#### 5.3.1. Standard Font Annual Performance Plan and Strategic Plan Specifications

Pages : +- 100 pages (back-to-back) including covers  
Size : A4 portrait (297mm x 210mm)  
Quantity : 150 hard copies of each book (100 APPs and 50 Strat Plan)  
Finishing : Thread-sewn in sections and covers drawn on  
: Body and covers printed cmyk+machine varnish x 2 sides.  
: Cover matt laminated x 1 side only.  
Body stock 135 gsm matt art  
Cover stock 300 gsm matt art

#### 5.3.2 Standard Font Operational Plan Specifications

Inside pages – 115gsm  
Size : A4 portrait (297mm x 210mm)  
Printing : Full colour on both sides  
Finishing : Perfect bound and thread sewn

## 5.4 Key Statistics for Social Development Trends Report

Pages	: 75 pages (back to back) including cover
Material	: Cover 300gsm UV spot Varnish on the front part and flip Die-Cut Inside pages – 115gsm
Quantity	: 100 hard copies.
Size	: A4 portrait (297mm x 210mm)
Printing	: Full colour on both sides
Finishing	: Perfect bound and thread sewn

## 5.6 Educational Outcomes of Learners receiving Social protection Report

Pages	: 65 pages (back to back) including cover
Material	: Cover 300gsm UV spot Varnish on the front part and flip Die-Cut Inside pages – 115gsm
Quantity	: 50 hard copies.
Size	: A4 portrait (297mm x 210mm)
Printing	: Full colour on both sides
Finishing	: Perfect bound and thread sewn

### 5.1.1. DSD Braille Format Educational Outcomes of Learners receiving Social protection Report Specifications

Format	: Contracted English unified braille code with braille proofreading
Material/Text Paper	: 147gsm Vellum Bristol; white
Quantity	: 2
Covers	: 310gsm Sinar board with braille and print label
Binding	: Double O-ring, wire, white into 4 braille volumes
Estimated number of Braille pages: 300 p. including covers.	

### 5.1.2. Layout, Design and Printing the Social Budget Publication

Pages	: 130 Including Covers
Sizes	: A4
Color	: Full Colors double sided as prescribed by the department
Paper	: 110 gsm Matt inside and 175 gsm Matt Laminated on the covers
Quantity	: 60 hard copies
Finishing	: Perfect Bound

## 6. Skills and experience required

The bidding service providers must have proven experience in Editing, Design, Layout, and Printing of documents such as Annual Reports and Annual Performance Plans which includes Annual Financial Statements. Proven experience as well as minimum skills required would include the following:



- **Proven Track Record:** All prospective service providers must provide proof of previous work in the form of documents such as annual reports which includes Annual Financial Statements;
- **Contactable and Reputable References:** All prospective service providers must provide contact details and letters of recommendation citing that the individuals or companies have proven track record in their specific areas of responsibility; i.e. editing, layout and design, etc.;
- **Editing Skills:** Experience in language and copy editing;
- **Layout and Design:** Experienced Creative Team including Graphic Designers
- **Project Management Skills:** implementation of project to ensure delivery/distribution according to project schedule
- **Time Management Skills:** Effectively managing timeframes to ensure adherence to deadlines

## 7. Documents to be provided for reference

The Department will provide the following for reference

- The Annual Reports, Annual Performance Plan, data for DSD Key statistical Trends report in Excel and Microsoft Word, and Strategic Plan in Microsoft Word;
- The Annual Financial Statements in Microsoft Word and/or Microsoft Excel;
- Corporate Identity Manual on request to the Service Provider;
- Annual Report Editorial Notes.

## 8. Bid Proposals to be submitted by prospective service provider

The Bid Proposal to include the following:

- A profile of the company and its credentials including size of the company, capacity, accounts managed and examples of work the company has worked on, including a description of similar work undertaken before;
- A detailed project plan reflecting project time frames, costing and outputs. The cost structure should be inclusive and as detailed as possible.
- How the service provider would approach DSD's account in terms of best and more effective way to do Editing, Design, Layout and Printing.
- Brief profiles (CVs) showing qualifications, skills and experience of the team which will be handling the account, i.e. creative and production team (authors, editors, designers, artists, etc.);

## 9. Briefing session

There will be no briefing session.

## 10. Proprietary right

- The DSD shall become the owner of the information, documents, advice and reports collected and compiled by the service provider to be appointed.
- 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.
- All information, documents and reports must be regarded as confidential until made public by the DSD.

## 11. Assessment of Service Provider

The following criteria will be used to assess the Service Provider:

- Technical Proposal showing an understanding of the brief and the project at hand;
- Proven Track Record and Experience;
- Examples of similar work done before;
- Contingency and disaster plan.

## 12. Evaluation Criteria

The evaluation of the bids will be conducted in two stages:

- Firstly, the proposals will be evaluated on functionality. An evaluation panel will allocate points (scale of 1 – 5) in respect of functionality according to the criteria set out in **Table 1**. Proposals scoring less than **70 points** in respect of functionality will be disqualified and not be evaluated further.
- Secondly, only the qualifying bids will be evaluated in terms of the 80/20 preference point system as contemplated in the Preferential Procurement Policy Framework Act 2022 (Act 5 of 2000).

The 80 points will be used to calculate price only and the 20 points will be used to calculate specific goals in line with SDB 6.1.

The points in respect of price will be calculated on the ceiling price for the project (inclusive of professional fees and VAT)

The technical proposals will be evaluated on a scale of 1-5 in accordance with the criteria below. The rating will be as follows:

1 = Very Poor    2 = Average    3 = Good    4 = Very Good    5 = Excellent

**Table 1: Evaluation Matrix**



Criteria Element	Weight	Scoring Criteria	Score
Project approach and implementation plan showing understanding of the specifications and detailed requirements. That is a proposed methodology and approach that is aligned to the department's required outputs, time frames and realistic costing.	30	5 = Excellent 4 = Very Good 3 = Good 2 = Average 1 = Very Poor	
Proven track record (industry related experience) <ul style="list-style-type: none"> <li>• Reputable verifiable references</li> <li>• Letters of recommendation</li> </ul>	30	5 = > 5 years 4 = 4-5 years 3 = 3-4 years 2 = 2-3 years 1 = <1 year	
Proof of similar previous work which includes annual financial statements (any one example of each). <ul style="list-style-type: none"> <li>• Annual Report</li> <li>• Annual Performance Plan</li> <li>• Strategic Plan</li> </ul>	20	5 = Excellent 4 = Very Good 3 = Good 2 = Average 1 = Very Poor	
Detailed contingency and disaster plan <ul style="list-style-type: none"> <li>• Labour unrest (Strike);</li> <li>• Fire;</li> <li>• Power disruptions (Load shedding);</li> <li>• Machinery and equipment breakdown;</li> <li>• Theft.</li> </ul>	20	5 = Excellent 4 = Very Good 3 = Good 2 = Average 1 = Very Poor	
<b>Total Functionality</b>	<b>100</b>		

### 13. Submissions

- Prospective bidders must submit their bids proposals in **two envelopes**:
- **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 pin certificate issued by SARS and legal entity registration certificate.
- **One other envelope** with the **financial proposal** (pricing schedule (SDB 3.3) with all cost related items, cost breakdown).
- The entire proposal should be placed on a memory stick in a PDF format.
- The following information must be endorsed on each envelope:
  - Bid number:
  - Closing date:
  - Name of the Bidder:
- Technical Proposal or financial Proposal
- The closing date for the submission of bid is
- Failure to comply with these conditions will result in a bid being disqualified.
- The Bids should be:
  - Deposited in the Tender Box,
  - Foyer of the HSRC Building

- 134 Pretorius Street
  - Pretoria
- Bids received after closing date and time will be regarded as late and will not be evaluated

#### 14. Signing of contract

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

#### 15. Enquires

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