



social development

Department:  
Social Development  
REPUBLIC OF SOUTH AFRICA

Private Bag X901, Pretoria, 0001  
Tel No: (012) 312 7566  
Fax No: (012) 312 7391

Sir/Madam

**REQUEST FOR QUOTATION FOR THE APPOINTMENT OF A SERVICE PROVIDER TO REVIEW, EVALUATE AND ADAPT THE INTEGRATED HIV/AIDS MANAGEMENT COURSE, BASED ON CAPACITY BUILDING NEEDS TO ADDRESS HIV & AIDS AND OTHER HEALTH CONCERNS WITH SOCIO-ECONOMIC AND DEMOGRAPHIC IMPLICATIONS FOR A PERIOD OF SIX MONTHS.**

1. Tender No: **SD10/2011**
2. Tender for: Appointment of a service provider to review, evaluate and adapt the integrated HIV/AIDS management course, based on capacity building needs to address HIV and AIDS and other health concerns
3. Required at: Department of Social Development
4. Closing Date: **09 DECEMBER 2011 at 11h00**
5. The attached document consists of 47 pages including this page.
6. The General Conditions of Contract and the attached, SBD1; SBD2; SBD3; SBD4; SBD6.1; SBD8; SBD9 and the terms of reference, as well as any other conditions accompanying this request are applicable.
7. All the documents accompanying this invitation must please be completed in detail, where applicable and returned with your proposal
8. Please make sure that your bid reaches this office before the closing time.
9. 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
10. This envelope can be placed in the Bid box in the foyer at HSRC Building, 134 Pretorius Street, Pretoria  
OR  
If posted, place the aforementioned envelope in a covering envelope addressed as follows:  
Procurement, Department of Social Development, Private Bag x901, Pretoria, 0001

Kind regards

DIRECTOR-GENERAL: DEPARTMENT OF SOCIAL DEVELOPMENT

DATE: 18/11/2011

# INVITATION TO BID

SBD1

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE DEPARTMENT OF SOCIAL DEVELOPMENT**

BID NUMBER: SD10/2011

CLOSING DATE: 09 DECEMBER 2011

CLOSING TIME: 11:00

**APPOINTMENT OF A SERVICE PROVIDER TO REVIEW, EVALUATE AND ADAPT THE INTEGRATED HIV/AIDS MANAGEMENT COURSE, BASED ON CAPACITY BUILDING NEEDS TO ADDRESS HIV & AIDS AND OTHER HEALTH CONCERNS WITH SOCIO-ECONOMIC AND DEMOGRAPHIC IMPLICATIONS FOR A PERIOD OF SIX MONTHS.**

**The successful bidder will be required to fill in and sign a written Contract Form (SBD 7).**

BID DOCUMENTS MAY BE POSTED TO:

Department of Social Development  
Private Bag X901  
Pretoria  
0001

OR

DEPOSITED IN THE BID BOX SITUATED AT:

HSRC BUILDING (GROUND FLOOR)  
134 Pretorius Street  
Pretoria

**Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.**

The bid box is generally open 24 hours a day, 7 days a week.

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS (NOT TO BE RE-TYPED)

THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT

**THE FOLLOWING PARTICULARS MUST BE FURNISHED  
(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)**

NAME OF BIDDER

POSTAL ADDRESS

STREET ADDRESS

TELEPHONE NUMBER

CODE ..... NUMBER.....

FACSIMILE NUMBER

CODE ..... NUMBER.....

CELLPHONE NUMBER

VAT REGISTRATION NUMBER

HAS A TAX CLEARANCE CERTIFICATE BEEN SUBMITTED (SBD 2)?

YES/NO

SIGNATURE OF BIDDER

NAME IN PRINT

CAPACITY

DATE

## TAX CLEARANCE CERTIFICATE REQUIREMENTS

It is a condition of bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

- 1 In order to meet this requirement bidders are required to complete in full the attached form TCC 001 "Application for a Tax Clearance Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders / individuals who wish to submit bids.
- 2 SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval.
- 3 The original Tax Clearance Certificate must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate will not be acceptable.
- 4 In bids where Consortia / Joint Ventures / Sub-contractors are involved, each party must submit a separate Tax Clearance Certificate.
- 5 Copies of the TCC 001 "Application for a Tax Clearance Certificate" form are available from any SARS branch office nationally or on the website [www.sars.gov.za](http://www.sars.gov.za).
- 6 Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website [www.sars.gov.za](http://www.sars.gov.za).



TAX CLEARANCE

TCC 001

**Application for a Tax Clearance Certificate****Purpose**

Select the applicable option

Tenders ☐Good standing ☐

If "Good standing", please state the purpose of this application

**Particulars of applicant**Name/legal name  
(Initials & surname  
or registered name)Trading name  
(if applicable)

ID/Passport no

Company/Close Corp.  
registered no

Income Tax ref no

PAYE ref no 7

VAT registration no

SDL ref no L

Customs code

UIF ref no U

Telephone no

Fax  
no

E-mail address

Physical address

Postal address

**Particulars of representative (Public Officer/Trustee/Partner)**

Surname

First names

ID/Passport no

Income Tax ref no

Telephone no

Fax  
no

E-mail address

Physical address

**Particulars of tender (if applicable)**

Tender number

Estimated Tender  
amount

R.

Expected duration  
of the tender

year(s)

**Particulars of the 3 largest contracts previously awarded**

Date started	Date finalised	Principal	Contact person	Telephone number	Amount
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**Audit**Are you currently aware of any Audit investigation against you/the company?  
If "YES" provide details

YES NO

**Appointment of representative/agent (Power of Attorney)**

I the undersigned confirm that I require a Tax Clearance Certificate in respect of

Tenders

or

Goodstanding

I hereby authorise and instruct

SARS the Applicable Tax Clearance Certificate on my/our behalf, to apply to and receive from

Signature of representative/agent

Date

Name of

representative/  
agent**Declaration**

I declare that the information furnished in this application as well as any supporting documents is true and correct in every respect.

Signature of applicant/Public Officer

Date

Name of applicant/  
Public Officer**Notes:**

1. It is a serious offence to make a false declaration.
2. Section 75 of the Income Tax Act, 1962, states: Any person who
  - (a) fails or neglects to furnish, file or submit any return or document as and when required by or under this Act; or
  - (b) without just cause shown by him, refuses or neglects to-
    - (i) furnish, produce or make available any information, documents or things;
    - (ii) reply to or answer truly and fully, any question put to him ...
 As and when required in terms of this Act ... shall be guilty of an offence ...
3. SARS will, under no circumstances, issue a Tax Clearance Certificate unless this form is completed in full.
4. Your Tax Clearance Certificate will only be issued on presentation of your South African Identity Document or Passport (Foreigners only) as applicable.

**PRICING SCHEDULE**  
(Professional Services)

<b>BID NO.:SD10/2011</b>	<b>CLOSING TIME 11:00 ON 09 DECEMBER 2011</b>
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<b>NAME OF SERVICE PROVIDER:</b>
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OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF VALUE ADDED TAX
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APPOINTMENT OF A SERVICE PROVIDER TO REVIEW, EVALUATE AND ADAPT THE INTEGRATED HI AIDS MANAGEMENT COURSE, BASED ON CAPACITY BUILDING NEEDS TO ADDRESS HIV& AIDS AND OTHER HEALTH CONCERNS WITH SOCIO-ECONOMIC AND DEMOGRAPHIC IMPLICATIONS FOR A PERIOD OF SIX MONTHS.

- |    |  |                                  |
|----|--|----------------------------------|
| 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 VAT for the project.     | R.....                           |
|    | TOTAL COST FOR PHASE ONE:  | R .....                          |
|    | TOTAL COST FOR PHASE TWO:  | R .....                          |
|    | TOTAL COST (PHASES 1 & 2):   | R .....                          |
| 3. | Period required for commencement with project after acceptance of bid  | .....                            |
| 4. | Estimated man-days for completion of project   | .....                            |
| 5. | Are the rates quoted firm for the full period of contract?   | .....                            |
| 6. | If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.  | .....<br>.....<br>.....<br>..... |
| 7. | Any enquiries regarding bidding procedures may be directed to –<br><br>Kobus Watson<br>Tel No: (012) 312 7566<br>Email: <a href="mailto:kobusw@dsd.gov.za">kobusw@dsd.gov.za</a> |                                  |

## DECLARATION OF INTEREST

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

<sup>1</sup>"State" means –

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

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

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

2.7.1 If so, furnish the following particulars:

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

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

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

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

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

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

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

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

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

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

2.8.1 If so, furnish particulars:

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

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

.....

.....

.....

.....

YES/NO

.....

.....

.....

YES/NO

.....

.....

.....

**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 IN TERMS OF  
PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION  
PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

May 2011

# PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2001

## PURCHASES

This preference form must form part of all bids invited. It contains general information and serves as a claim form for Historically Disadvantaged Individual (HDI) preference points as well as a summary for preference points claimed for attainment of other specified goals stipulate that preference points for equity ownership must be included in all bids.

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF EQUITY OWNERSHIP BY HISTORICALLY DISADVANTAGED INDIVIDUALS (HDIs), AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2001.**

### 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 R500 000; and
- the 90/10 system for requirements with a Rand value above R500 000.

1.2 The value of this bid is estimated to be more than R500 000 and therefore the 90/20 system shall be applicable.

1.3 Preference points for this bid shall be awarded for:

- (a) Price and functionality
- (b) Specific contract participation goals, as specified in the attached forms.

1.3.1 The points for this bid are allocated as follows:

<b>1.3.1.1</b>	<b>PRICE &amp; FUNCTIONALITY</b>	<b>POINTS</b>
		90

#### 1.3.1.2 SPECIFIC CONTRACT PARTICIPATION GOALS

##### (a) Historically Disadvantaged Individuals:

- |       |   |   |
|-------|---|---|
| (i)   | Who had no franchise in national elections before the 1983 and 1993 Constitutions | 5 |
| (ii)  | is a female   | 3 |
| (iii) | Disabled person   | 2 |

##### (b) Other specific goals (goals of the RDP- plus local manufacture)

Development of human resources	0
--------------------------------	---

<b>TOTAL</b>	<b>10</b>
--------------	-----------

3

- (i)
- (ii)
- (iii)

<b>Total points for Price, HDIs and other RDP-goals must not exceed</b>	<b>100</b>
---	------------

**Separate Preference Points Claim Forms will be used for the promotion of the specific goals for which points have been allocated in paragraph 1.3.1.2 (b) above.**

- 1.4 Failure on the part of a bidder to fill in and/or to sign this form may be interpreted to mean that preference points are not claimed.
- 1.5 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. GENERAL DEFINITIONS**

- 2.1 **“Acceptable bid”** means any bid which, in all respects, complies with the specifications and conditions of bid as set out in the bid document.
- 2.2 **“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, works or services.
- 2.3 **“Comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilised have been taken into consideration.
- 2.4 **“Consortium or joint venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skills and knowledge in an activity for the execution of a contract.
- 2.5 **“Contract”** means the agreement that results from the acceptance of a bid by an organ of state.
- 2.6 **“Specific contract participation goals”** means the goals as stipulated in the Preferential Procurement Regulations 2001.
- 2.6.1 In addition to above-mentioned goals, the Regulations [12.(1)] also make provision for organs of state to give particular consideration to procuring locally manufactured products.
- 2.7 **“Control”** means the possession and exercise of legal authority and power to manage the assets, goodwill and daily operations of a business and the active and continuous exercise of appropriate managerial authority and power in determining the policies and directing the operations of the business.
- 2.8 **“Disability”** means, in respect of a person, a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being.
- 2.9 **“Equity Ownership”** means the percentage ownership and control, exercised by individuals within an enterprise.
- 2.10 **“Historically Disadvantaged Individual (HDI)”** means a South African citizen
- (1) who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) (“the interim Constitution”); and/or
  - (2) who is a female; and/or
  - (3) who has a disability:
- provided that a person who obtained South African citizenship on or after the coming into effect of the Interim Constitution, is deemed not to be a HDI;
- 2.11 **“Management”** means an activity inclusive of control and performed on a daily basis, by any person who is a principal executive officer of the company, by whatever name that person may be designated, and whether or not that person is a director.
- 2.12 **“Owned”** means having all the customary elements of ownership, including the right of decision-making

and sharing all the risks and profits commensurate with the degree of ownership interests as demonstrated by an examination of the substance, rather than the form of ownership arrangements.

- 2.13 **“Person”** includes reference to a juristic person.
- 2.14 **“Rand value”** means the total estimated value of a contract in Rand denomination that is calculated at the time of bid invitations and includes all applicable taxes and excise duties.
- 2.15 **“Small, Medium and Micro Enterprises (SMMEs)”** bears the same meaning assigned to this expression in the National Small Business Act, 1996 (No 102 of 1996).
- 2.16 **“Sub-contracting”** means the primary contractor's assigning or leasing or making out work to, or employing another person to support such primary contractor in the execution of part of a project in terms of the contract.
- 2.17 **“Trust”** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person.
- 2.18 **“Trustee”** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

### 3. ESTABLISHMENT OF HDI EQUITY OWNERSHIP IN AN ENTERPRISE

- 3.1 Equity ownership shall be equated to the percentage of an enterprise which is owned by individuals classified as HDIs, or in the case of a company, the percentage shares that are owned by individuals classified as HDIs, who are actively involved in the management and daily business operations of the enterprise and exercise control over the enterprise, commensurate with their degree of ownership.
- 3.2 Where individuals are not actively involved in the management and daily business operations and do not exercise control over the enterprise commensurate with their degree of ownership, equity ownership may not be claimed.

### 4. ADJUDICATION USING A POINT SYSTEM

- 4.1 The bidder obtaining the highest number of points will be awarded the contract.
- 4.2 Preference points shall be calculated after prices have been brought to a comparative basis.
- 4.3 Points scored will be rounded off to 2 decimal places.
- 4.4 In the event of equal points scored, the bid will be awarded to the bidder scoring the highest number of points for specified goals.

### 5. POINTS AWARDED FOR PRICE

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

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

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

Where

Ps = Points scored for price of bid under consideration

Pt = Rand value of bid under consideration

Pmin = Rand value of lowest acceptable bid

## 6. Points awarded for historically disadvantaged individuals

- 6.1 In terms of Regulation 13 (2) preference points for HDI's are calculated on their percentage shareholding in a business, provided that they are actively involved in and exercise control over the enterprise. The following formula is prescribed in Regulation 13 (5) (c):

$$NEP = NOP \times \frac{EP}{100}$$

Where

NEP = Points awarded for equity ownership by an HDI

NOP = The maximum number of points awarded for equity ownership by an HDI in that specific category

EP = The percentage of equity ownership by an HDI within the enterprise or business, determined in accordance with the definition of HDI's.

- 6.2 Equity claims for a trust will only be allowed in respect of those persons who are both trustees and beneficiaries and who are actively involved in the management of the trust.
- 6.3 Documentation to substantiate the validity of the credentials of the trustees contemplated above must be submitted.
- 6.4 Listed companies and tertiary institutions do not qualify for HDI preference points.

- 6.5 A consortium or joint venture may, based on the percentage of the contract value managed or executed by their HDI-members, be entitled to preference points in respect of an HDI.

- 6.6 A person awarded a contract as a result of preference for contracting with, or providing equity ownership to an HDI, may not subcontract more than 25% of the value of the contract to a person who is not an HDI or does not qualify for the same number or more preference for equity ownership.

## 7. BID DECLARATION

- 7.1 Bidders who claim points in respect of equity ownership must complete the Bid Declaration at the end of this form.

## 8. EQUITY OWNERSHIP CLAIMED IN TERMS OF PARAGRAPH 2.10 ABOVE. POINTS TO BE CALCULATED FROM INFORMATION FURNISHED IN PARAGRAPH 9.8.

	Ownership	Percentage owned	Points claimed
8.1	Equity ownership <b>by persons who</b> had no franchise in the national elections	%	.....
8.2	Equity ownership <b>by women</b>	%	.....
8.3	Equity ownership <b>by disabled persons*</b>	%	.....

\*If points are claimed for disabled persons, indicate nature of impairment (see paragraph 2.8 above)

## 9 DECLARATION WITH REGARD TO EQUITY

9.1 Name of firm : .....

9.2 VAT registration number : .....

9.3 Company registration number : .....

#### 9.4 TYPE OF FIRM

## Partnership

One person business/sole trader

Close corporation

Company

(Pty) Limited

[TICK APPLICABLE BOX]

## 9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

## 9.6 COMPANY CLASSIFICATION

Manufacturer

Supplier

Professional service provider

Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

9.7 TOTAL NUMBER OF YEARS THE FIRM HAS BEEN IN BUSINESS? .....

9.8 List all Shareholders by Name, Position, Identity Number, Citizenship, HDI status and ownership, as relevant. Information to be used to calculate the points claimed in paragraph 8.

[illegible]

\*Indicate YES or NO

## 9.9 Consortium / Joint Venture

9.9.1 In the event that preference points are claimed for HDI members by consortia / joint ventures, the following information must be furnished in order to be entitled to the points claimed in respect of the HDI member:

[illegible]

9.10 I/we, the undersigned, who warrants that he/she is duly authorised to do so on behalf of the firm certify that points claimed, based on the equity ownership, indicated in paragraph 8 of the foregoing certificate, qualifies the firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct.
- (ii) The Equity ownership claimed is 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 paragraph 8, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct.
- (iv) If the claims are found to be incorrect, the purchaser may, in addition to any other remedy it may have -
  - (a) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (b) 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;
  - (c) impose a financial penalty more severe than the theoretical financial preference associated with the claim which was made in the bid; and

**WITNESSES:**

1. ....

.....  
SIGNATURE(S) OF BIDDER(S)

2. ....

DATE:.....

ADDRESS:.....

.....

.....

.....

## 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	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? (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).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	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)? To access this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> , 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.	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:		

**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

Js3655W

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

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

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

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

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

---

(Bid Number and Description)

in response to the invitation for the bid made by:

---

(Name of Institution)

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

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

(Name of Bidder)

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

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

<sup>3</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of Bidder

Js914w 2

## **TERMS OF REFERENCE**

### **HIV AND AIDS CAPACITY BUILDING: EVALUATION NEEDS ASSESSMENT AND COURSE DEVELOPMENT.**

**APPOINTMENT OF A SERVICE PROVIDER TO REVIEW, EVALUATE AND ADAPT THE *INTEGRATED HIV&AIDS MANAGEMENT COURSE*, BASED ON CAPACITY BUILDING NEEDS TO ADDRESS HIV& AIDS AND OTHER HEALTH CONCERNS WITH SOCIO-ECONOMIC AND DEMOGRAPHIC IMPLICATIONS FOR A PERIOD OF SIX MONTHS.**

#### **1. INVITATION OF PROPOSALS**

The purpose of this Terms of Reference is to invite Service Providers to submit proposals to review, evaluate and adapt the Integrated HIV & AIDS Management Course, based on capacity building needs to address HIV & AIDS and other health concerns with socio-economic and demographic implications, on the basis of an assessment of the state of the epidemic and other health concerns in South Africa, and of current capacity building programmes in South Africa and SADC.

#### **2. BACKGROUND OF THE STUDY**

Most evidently, the HIV and AIDS epidemic jeopardized significant health-related improvements attained during the past decades, affects all sectors and dimensions of human populations, and remains the most critical developmental issue facing the world today. Hence the government has made it a national priority because it impacts on population trends and sustainable human development. Since its inception, the HIV & Aids and STI Strategic Plan for South Africa (2007-2011) sought to provide continued guidance to all government departments, private sector and civil society, as a multi-sectoral response to the challenges associated with HIV infection and the wide ranging impacts of AIDS. Similarly, the Chief

Directorate: Population and Development in the Department of Social Development, (1) sought to address the concerns of the Population Policy for South Africa (1998), (2) contribute towards strengthening the multi-sectoral response to HIV and AIDS; and (3) support local responses through building capacities of government planners and managers. These endeavors include to increase capacity, and to develop human resources that integrate population trends and other health concerns with demographic implications into development planning.

In July 2001, the course titled “A Primary HIV and AIDS Capacity Development Course for Government Planners” was developed and rolled out to government planners at national, provincial and local levels. Subsequently, the course was evaluated and adapted according to the findings and recommendations of the evaluation report produced in 2004. The course, HIV and AIDS and Integrated Development Capacity Development Course for Government Managers and Planners was implemented between September 2007 and March 2009 in the 9 provinces reaching a total of 300 participants. In total 114 courses were presented to 2 315 participants during the period July 2001 and March 2009. An impact evaluation study was carried out in 2010 and the report provided recommendations that will provide valuable insight to this study. During 2011, PALAMA partnered with DSD (i.e. National Population Unit) to roll out the course titled “Integrated HIV & AIDS and TB Management Course” in the 9 provinces, focusing on rural nodes, and specifically targeting government and civil society. In the current Government’s Programme of Action (2009), HIV and AIDS and health concerns have been identified as one of government’s priorities.

The Statistics South Africa report<sup>1</sup>, shows that recorded deaths have increased by 90% in a decade, and that there has been a three-fold increase in TB deaths

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<sup>1</sup> Statistics South Africa (2009). Mortality and causes of death in South, 2007. Findings from death notification.

over the same period. The report also shows that between 1997 and 2007, tuberculosis as the leading underlying cause of death; increased from 7.0% to 12.8%. Influenza and pneumonia also increased from 3.6% in 1997 to 8.3% in 2007. Tuberculosis, influenza and pneumonia, intestinal infectious diseases seem to be higher among both males and females, and occur predominantly in populations who are poly-parasitized. In view of the challenges posed by HIV and AIDS and related diseases, prevention of infections remain the most important approach to control the spread of infections and manage the epidemic. Care and support for the infected and affected has become crucial for long-term integrated HIV and AIDS programmes over time.

While the impacts of HIV and AIDS are experienced in many sectors, the effects at household level and among children affected and infected is intense<sup>2</sup>. Research reports highlight the important and practical issues related to the impacts of HIV and AIDS on households, namely, decrease in incomes, increase in the number of dependants per household, increase in school drop outs due to lack of resources, and the increase in cost of health care. Such issues have policy implications for many government departments, nationally and provincially and for local governments.

In order to achieve Government's priorities in the Programme of Action, it is important to address current socio-economic and demographic implications of HIV and AIDS and other health issues in the country. Against this background, the assessment and identification of gaps in capacity building and training programmes will enhance the response to the HIV and AIDS epidemic.

### **3. AIM OF THE STUDY**

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<sup>2</sup> Refer to the report: "Effects of HIV/AIDS on Household economies in South Africa: Desktop review. Undertaken for the Department of Social Development, by the Centre for the Study of AIDS, University of Pretoria, February, 2001

The aim of the project is to review and evaluate the Integrated HIV and AIDS Management Course, and adapt a new course that addresses capacity building gaps, based on evidence obtained from (1) an overview of the state of HIV and AIDS epidemic and other health concerns with socio-economic and demographic implications in South Africa, including the update of socio-economic indicators; (2) a comprehensive overview of the current state of the HIV and AIDS capacity building programmes, including other health concerns with socio-economic and demographic implications for the country; (3) an overview of HIV and AIDS capacity building strategies and programmes in the SADC region; (4) an evaluation of the current and Integrated HIV and AIDS and TB Management Course for Government Managers and Planners; and (5) Develop, pilot and accredit the new training course.

#### **4. OBJECTIVES OF THE STUDY**

- 4.1 To provide an overview of the state of the HIV and AIDS epidemic and other health concerns with socio-economic and demographic implications in South Africa and update the socio-economic indicators.
- 4.2 To provide an overview of HIV and AIDS capacity building strategies and programmes in the SADC region.
- 4.3 To evaluate the current Integrated HIV and AIDS and TB management Course for Government Managers and Planners, rolled out during May – July 2011 (see Annexure A).
- 4.4 To review relevant capacity building programmes and training materials across all sectors in the country on the socio-economic and demographic implications of HIV and AIDS and other health concerns, in order to identify gaps and provide recommendations on areas of capacity building that are not currently addressed.
- 4.5 To develop and pilot an accredited training programme addressing the socio-economic and demographic implications of HIV and AIDS and other health concerns, based on the findings and recommendations above, to

ensure that the course be implemented at all three spheres of government and Civil Society.

## **5 SCOPE OF WORK**

The scope of work is illustrated in Appendix A. The evaluation of HIV and AIDS capacity building initiatives in the country, needs assessment and course development should be conducted within the context of the Governments Programme of Action for 2009, the Population Policy for South Africa and the HIV and AIDS Strategic Plan for South Africa (2007-2011).

Points 5.1 to 5.3 below indicate three research activities to be conducted concurrently, namely:

- To generate information on state of the HIV and AIDS epidemic and other health concerns with socio-economic and demographic implications, which include updating the socio-economic indicators;
- To generate information on capacity building strategies, programmes and projects that address HIV and AIDS and other health concerns with socio-economic and demographic implications in South Africa, as well as in the SADC region; and
- To evaluate the current Integrated HIV and AIDS and TB Management course rolled out during May-July 2011 in all nine provinces with focus on the rural nodes.

The research findings and recommendations from **PHASE 1**: 5.1 to 5.3 should be integrated and used as a basis to execute **PHASE 2**: 5.4, (below) that is, to review the existing HIV and AIDS Integration course; and develop, pilot and accredit an Integrated HIV and AIDS capacity development course for managers and planners in government and civil society.

To accomplish the above, the service provider will be required to, among others, conduct the following specific activities:

- 5.1 Provide a report on ***an overview of the state of the HIV and AIDS epidemic and other health concerns with socio-economic and demographic implications in South Africa, including updating the socio-economic indicators*** contained in the following documents:
  - 5.1.1 Human Sciences Research Council of South Africa. 2001. A Review to Assess and Identify HIV and AIDS Indicators. Chief Directorate: Population and Development Department of Social Development.
  - 5.1.2 Human Sciences Research Council of South Africa. 2003. The State of Proposed Indicators to Monitor the Impact and Other Aspects of HIV and AIDS. Chief Directorate: Population and Development Department of Social Development.
  - 5.1.3 Human Sciences Research Council of South Africa. 2006. Review, Update and Definition of Indicators to Monitor the Social Impacts and Other Aspects of HIV and AIDS in South Africa. Department of Social Development. Human Sciences Research Council of South Africa. 2001.
  - 5.1.4 Bureau for Market Research, 2009. Aids Economic indicators for South Africa

The report on the overview of the state of the HIV and AIDS epidemic and other health concerns with socio-economic and demographic implications, and the updated socio-economic indicators should be accompanied by an analytical interpretative narrative report.

5.2 Provide a report on ***capacity building strategies, programmes and projects that address HIV and AIDS and other health concerns with socio-economic and demographic implications in South Africa, as well as in the SADC region.*** The SADC report must focus on HIV and AIDS only.

- Review relevant HIV and AIDS capacity building programmes including training materials across all sectors, and identify gaps that exist in the country.
- Do a desktop review of capacity building policies and programmes on HIV and AIDS in SADC, and different training strategies utilized.

5.3 Provide an ***evaluation of the current Integrated HIV and AIDS and TB Management course*** rolled out during May-July 2011 in all nine provinces with focus on the rural nodes.

The scope of work for the evaluation should include

- Development of questionnaires to be used. Four questionnaires must be developed on (1) learner's response to the training intervention, (2) questionnaire on employee feedback, (3) stakeholder questionnaire, and (4) questionnaire for the training provider.
- Interviews with the course facilitators and the service provider for all courses implemented;
- Interviews with course participants in all the nine provinces:
  - Sample Size: there are a total of 600 course participants.
  - This evaluation is to reach a well representative sample of at least 80% participants and their supervisors, ensuring representativity of the various organisations and spheres of government and civil society.

- The methodologies to be used will include; in-depth face-to-face interviews and focus group discussions with course participants. At least 40% of the interviews must be face-to-face and the rest telephonic or e-mail interviews. At least 1 focus group discussion should be carried out per province.

The evaluation should establish:

- Standard of the training programme;
  - Support received/required from employers and the institution;
  - Participants, have they been able to apply the knowledge gained in their work situation and what value does it have for them in their work;
  - Suitability of the course and existing gaps in capacity building.
  - Recommendations for future training courses.
- Interviews with employers / managers of course participants;  
Evaluation must include at least 50% of the supervisors of course participants, in order to determine:
    - Their perspective, and if they have observed any change in the quality of work performed by their trained staff in relation to the objectives of the course.
    - What have been the benefits of the course for the employer/workplace?
    - What specific actions did they take to facilitate the admission of their staff to the course?
    - What specific actions did they take to facilitate their staff ability to study for the course and to submit the required Portfolio of Evidence?
  - In-depth Interview(s) with responsible personnel at PALAMA for the facilitation of the course;
  - In-depth Interview(s) with responsible personnel at the National Population Unit and Provincial Population Units;
  - Pre- and post evaluation interviews with all stakeholders.

The final report should include ; Relevance of programme objectives; Adequacy (quantity and timeliness) of inputs – financial, material and human resources; Adequacy of support by employers of participants; the government coordinating agency, i.e. PALAMA (Public Administration Leadership and Management Academy); the service provider, as well as the CDP&D; Outputs of the programme; External efficiency (relevance) of the programme; Impact of the programme; Risks and assumptions; Effectiveness of interventions including future prospects, any changes in modality for implementation and recommendations.

The table below shows the number of participants reached between 24 May 2011 to 1 July 2011.

Province	Location	Participants
Gauteng	Johannesburg Metro(Ikhaya Lethemba), Soshanguve, Pretoria	117
Eastern Cape	Aliwal North, Chris Hani, OR Tambo, Sommerset East, King Williamstown, Bisho, Port Elizabeth, Joe Gqabi ,Nelson Mandela, Department of Safety, Provincial Population Unit	165
Free State	Bloemfontein, Harrismith,	44
Limpopo	Polokwane	25
NorthWest	Mafikeng, Rustenburg	66
Mpumalanga	Bushbuckridge, Witbank,	49
Kwazulu Natal	Ulundi, Ladysmith, EThekweni	75
Northern Cape	Kimberly	26
Total		567

## PHASE 2

5.4 ***Review the existing HIV and AIDS Integration course; and develop, pilot and accredit an Integrated HIV and AIDS capacity development course for managers and planners in government and civil society.*** The new course should be based on the findings and recommendations on addressing the existing capacity building gaps on HIV and AIDS and other health concerns with socio-economic and demographic implications.

- Develop appropriate training material for managers and planners in government targeting senior and middle managers.
- Develop appropriate training material for managers and planners in civil society.
- Pilot the HIV and AIDS Integrated course.

- Accredit the course with HWSETA and SAQA.

In order to achieve the aims of the study, researchers will be required to conduct an extensive literature review which includes the following reports/ documents:

- Department of Social Development. 2006. Supporting the Development of Evidence-Based Policies and Programmes: Identification of Information and Research Gaps on the Impact of HIV and AIDS and Research Priority Needs.
- Department of Social Development, 1998, Population Policy for South Africa, Pretoria: Republic of South Africa.
- Department of Social Development. 2008. HIV and AIDS. Background paper prepared for the Department of Social Development's 10-year review of the population policy implementation in South Africa, 1998-2008.
- Bureau of Market Research (BMR);2009 : HIV and AIDS Economic Impact Indicators for South Africa
- Department of Social Development. 2004. Country report on the International Conference on Population and Development at 10. Pretoria: Department of Social Development
- Prodigy Business Services (Pty) Ltd. May 2010. Impact Evaluation HIV & AIDS and Integrated Development - A Capacity Development Course for Government Managers and Planners Programme
- Department of Social Development. Strategy on Population and Development, 2004 – 2009;
- Wits Health Consortium & Department of Social Development. November 2007 Volume 3. The Extent of Functional Integration of HIV and AIDS Services at Local Level in South Africa.
- Department of Social Development. November 2003. HIV and AIDS Round Table Forum. Addressing the International Conference on

Population Development Goal: *"Reducing the HIV rate amongst 15-24 year old by 25% in 2005 in most affected countries and by 25% by 2010 globally".*

- Department of Social Development. HIV and AIDS Case Studies in South Africa. Volume 1.
- Department of Social Development. 2004 Documenting HIV and AIDS Case Studies in South Africa. Volume 2. Local Government HIV and AIDS projects
- Department of Social Development & the Centre for the Study for Aids, University of Pretoria. 2003. Population, HIV/AIDS and Development: A resource document.
- Centre for the Study of AIDS, University of Pretoria, February 2001. Effects of HIV and AIDS on Household Economies in South Africa: Desktop review. Undertaken for the Department of Social Development.
- Department of Social Development. 2005. Policy Framework on orphans and Other Children made Vulnerable by HIV and AIDS, South Africa: "Building a Caring Society Together"
- Department of Social Development. 2006. National Action Plan for orphans and other made vulnerable by HIV and AIDS. South Africa 2006-2008: "Building a Caring Society Together";
- Review the evaluation reports for 2004 and 2006 on the HIV and AIDS and Integrated Development Course as well as the Impact Evaluation report (May 2010) by Prodigy.
- Government's Programme of Action, 2009.
- Human Sciences Research Council of South Africa. 2001. *A Review to Assess and Identify HIV and AIDS Indicators*. Chief Directorate: Population and Development Department of Social Development.
- Human Sciences Research Council of South Africa. 2003. *The State of Proposed Indicators to Monitor the Impact and Other Aspects of*

*HIV/AIDS*. Chief Directorate: Population and Development Department of Social Development.

- Human Sciences Research Council of South Africa. 2006. *Review, Update and Definition of Indicators to Monitor the Social Impacts and Other Aspects of HIV and AIDS in South Africa*. Department of Social Development.
- Republic of South Africa, Department of Health. 2007. HIV and AIDS and STI Strategic Plan for South Africa, 2007–2011
- Gaisie S. K & Groenewald C. J. Government of South Africa and United Nations Population Fund. July 2004. *Primary HIV and AIDS Capacity Development Course for Government Planners*. Volume 2: Evaluation of the First and Second Rounds of the Course, July 2001 to December 2002.
- Gaisie S. K & Groenewald C. J. Government of South Africa and United Nations Population Fund. July 2004. *Primary HIV and AIDS Capacity Development Course for Government Planners*. Strengthening Institutional and Technical Capacity for Implementing Population and Development Programmes. Volume 4: Guidelines for Revision of Curriculum.
- Gaisie S. K & Groenewald C. J. Government of South Africa and United Nations Population Fund. July 2006. *HIV and AIDS Integrated Development. A Capacity Development Course for Government Managers and Planners 2005-2006*. Volume 2.
- Gaisie S. K & Groenewald C. J. 2004. Government of South Africa and United Nations Population Fund. Review of Training and Research Programmes in Population Studies in South African Universities and Evaluation of Primary HIV and AIDS Capacity Development Course for Government Planners. Volume 6: Executive summary.
- Gaisie S. K & Groenewald C. J. 2004. Government of South Africa and United Nations Population Fund. *Primary HIV and AIDS Capacity Development Course for Government Planners*. Volume 5:

*Development of skills for Functional Integration of Population and Development.*

- Gaisie S. K & Groenewald C. J. 2004. Government of South Africa and United Nations Population Fund. *Primary HIV and AIDS Capacity Development Course for Government Planners. Volume 3: Evaluation of the Six Courses conducted March to June 2004.*

## 6 EXPECTED ACTIVITIES AND PROJECT OUTCOMES

PHASES	ACTIVITIES	MONTHS						DELIVERABLES
		1	2	3	4	5	6	
1	Literature review	X	X	X				Report on the state of the HIV/AIDS epidemic and other concerns with demographic implications including the updated socio-economic indicators
2	Evaluate the current Integrated HIV & AIDS and TB Management Course for Government Managers and Planners	X	X	X				Report on the evaluation of the integrated HIV and AIDS and TB Management Course for Government Managers and Planners
3.1	Review relevant capacity building programmes addressing HIV& AIDS and other health concerns with socio-economic and demographic implications including training materials across all sectors, in order to identify gaps that exist in the country.	X	X	X				Report on relevant HIV and capacity building programmes including training materials across all sectors and gaps identified in the country.
3.2	Review relevant capacity building programmes addressing HIV& AIDSs, including training materials in the SADC region.	X	X					Report on HIV and AIDS capacity building programmes and strategies in the SADC region.
4	Identify the gaps in capacity building of the Integrated HIV and AIDS course and on the report produced.		X	X				A report on the workshop to discuss the gaps identified and discuss the process for addressing them in the future HIV and capacity building training course.
5	Review and develop training course on HIV & AIDS and Integrated Development based on the existing gaps in capacity building.			X	X	X		Draft a comprehensive HIV& AIDS and Integrated Development Course for government and civil society managers and planners.
6	Develop training materials suitable for planners and managers in government and civil society				X	X		Draft training materials for the course developed
7	Pilot and adapt the training course					X	X	One training course rolled out to at least 25 participants
8	Accredit the newly developed training course with HWSETA					X	X	An accredited comprehensive course on HIV& AIDS and other concerns with socio-economic and demographic implications.

## **7. PERIOD OF CONTRACT AND PROJECT FUNDING**

The project must be completed within six (6) months after the tender has been awarded.

## **8. GUIDELINES FOR SUBMISSIONS**

The following guidelines exist:

The format of the proposal could be developed along the following lines:

### **A. Background and problem statement**

### **B. Approach and method**

How were the projects developed and implemented?

Who had overall responsibility for the management of the projects?

How will performance be monitored and measured?

### **C. Research team**

Names and skills of the proposed researchers.

CVs of principle researchers.

Does the research team comprise a joint venture? If so, how is it structured?

How will your staff be linked to project activities and benefit from the project in terms of skills development?

Does the team include historically disadvantaged individuals and women at all levels?

The inclusion of the youth and students will add value to the proposal.

### **D. Work-plan, activities, dates and deliverables**

Your project should be broken down into component activities and include a description of the activity, time frame, deliverables/milestones and proposed cost.

**Activities Description:** each activity should be described and justified in terms of the overall objectives to be achieved.

**Time frame for Activities:** separate activities should be clearly distinguished; results of activities need to relate to each other and the ultimate objective(s) to be achieved.

**Deliverables:** What specific outputs/milestones will be derived from the project and each of its activities?

## **E Budget**

Information regarding each item set forth in this section shall be furnished in sufficient detail to allow a complete evaluation. Failure to furnish complete information may cause the proposal to be disqualified.

**Supporting Financial Documentation:** the documentation described below should be submitted to substantiate the satisfactory financial management capability of the applicant.

**Budget narrative** with cost breakdowns and other data to justify each cost line item in the Budget. Salaries proposed for the individuals to be supported must be included in the breakdown.

The names, telephone numbers and positions of personnel authorised to negotiate on behalf of the organisation submitting the proposal.

## **9. REPORTING ARRANGEMENTS AND RESPONSIBILITIES**

All deliverables should be submitted to the Department of Social Development (Chief Directorate Population and Development). The Steering Committee must accept and approve all deliverables. Any deliverable submitted and not accepted must be reworked and resubmitted at no additional cost.

The successful applicant will report to the Steering Committee and keep them informed of all project-related development. They will provide monthly progress reports either orally or in writing and interact with the Steering Committee regularly.

## **10. GENERAL CONDITIONS**

- 10.1 As the conclusion of this project is of critical importance to the department, the successful bidder must commence with the project at the latest week after receipt of the letter of acceptance.
- 10.2 The Department reserves the right to cancel the contract and seek remedies, should the service provider not conform or adhere to contractual responsibilities as specified in the bid.
- 10.3 All documentation compiled by the service provider shall be subjected to quality control by the Department officials prior to it being accepted by the Department.
- 10.4 Payment will be made in proportion to the work completed and upon acceptance by the Department in accordance with the contract and work completed
- 10.5 The service provider is restricted to the time frames as agreed with the Department for the various phases that will be agreed to on signing of the Service Level Agreement.
- 10.6 The Department will conduct quality assurance on work done by the contractor and unsatisfactory work will be referred to the consultant for improvement before payment is effected.
- 10.7 The service provider shall complete all relevant bid forms and pricing schedules included in this request. Quotation price must be inclusive of all costs, including disbursements and Value Added Tax.
- 10.8 The general conditions of contract as prescribed by National Treasury will be applicable in all instances.
- 10.9 The successful contractor must at all times comply with the departmental policies and procedures as well as maintain a high level of confidentiality of information.
- 10.10 All information, documents, programmes and reports must be regarded as confidential and may not be made available to any unauthorised person or institution without the written consent of the Chief Director: Population and Development.
- 10.11 The letter of acceptance to the successful service provider(s), together with the original bid documents and the proposal of the successful service provider (s) will constitute a binding contract.

10.12 The Department of Social Development reserves the right to enter into Service Level Agreement with the successful service provider(s).

## **11. SUBMISSION OF QUOTATIONS**

Prospective bidders must submit their financial proposals (professional fees, material, travel & subsistence cost and the ceiling price for the project) and technical proposals (response to the terms of reference & evaluation criteria, Tax Clearance Certificate) in two separate envelopes.

The following information must be endorsed on each of the envelopes:

Bid No:

Closing date:

Name of bidder:

“Technical” or “Financial proposal

Failure to submit the bid proposal in two separate envelopes will result in a bid being disqualified.

## **12. EVALUATION OF PROPOSALS**

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

12.1.1 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 paragraph 12.5. Proposals scoring less than 70% in respect of functionality will be disqualified and not be evaluated further.

12.1.2 Thereafter, only the qualifying bids will be evaluated in terms of the 90/10 preference point system as contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

12.2 The 90 points will be used to calculate price only and the 10 points will be used for equity ownership.

- 12.3 The points in respect of price will be calculated on the ceiling price for the project (inclusive of professional fees, subsistence & travel costs and VAT).
- 12.4 A maximum of 10 points will be allocated for equity ownership. The points are made up as follow:

HDI (no franchise)	5
Woman equity	3
Disability	2
TOTAL	10

#### **12.5 EVALUATION CRITERIA**

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

Fields	Specific areas	Weighting	Sub Weighting	Rating					Score
Service Provider's relevant experience for the assignment	Previous relevant experience and overall track record in HIV and AIDS / health concerns with demographic implications projects	50	20						
	Demonstrated project management experience and a track record to implement large-scale social research projects, including demonstration of capacity to evaluate capacity and training programmes.		10						
	Previous experience in the developing of training materials and accreditation		20						
Methodology and Approach	Responsive to TOR (with regard to showing understanding of the TOR, Project Plan and timeframes). Clarity, credibility, innovation and achievability	20	15						
	Demonstrate how the project will be used to build capacity of individuals from disadvantaged background, especially women, youth and students		5						

Fields	Specific areas	Weighting	Sub Weighting	Rating					Score
Expertise/experience of the key staff/ team proposed (CV's to be submitted,	Quality of personnel against skills, competencies and specified experience. Multi-disciplinary research team, including a social scientist, demographer, health expert and a economics/poverty expert. SETA accredited short course developer , training material designer and language editor.	30	30						
<b>TOTAL</b>			100						

### 13. TARIFFS AND PAYMENTS

Payment of the fee shall be effected in accordance with the completion of the various milestones as set out in the project plan. The proposal should indicate progress payment on required specific milestones. How the payment per completion of a milestone will be done, will be agreed upon between the Steering Committee and the service provider prior to the beginning of the project.

### 15. ENQUIRIES

All enquires may be directed to:

Mr K Watson Email: [kobusw@dsd.gov.za](mailto:kobusw@dsd.gov.za)

Tel No: (012) 312 7566

## APPENDIX A



