



RFP NUMBER:	RFP/SASSETA/23241104/1
DESCRIPTION:	Appointment of a panel of two (2) service providers to render a learner management and stipend disbursement solution to SASSETA for a period ending on 31st March 2030
PUBLISH DATE:	20 October 2023
CLOSING DATE:	17 November 2023
CLOSING TIME:	11h00 am
COMPULSORY BRIEFING SESSION DATE	N/A
VALIDITY PERIOD:	120 days from the closing date
PREFERENCE POINT SYSTEM	80/20
BID RESPONSES TO BE SUBMITTED ELECTRONICALLY ONLY	Proposals to be submitted electronically via email to stipend@sassetta.org.za Quoting the reference (RFP/SASSETA/ 23241104/1)
ATTENTION:	Ms. Lebo Hlombe

The email address (stipend@sassetta.org.za) is for the submission of tender proposals only and will only be accessed by SASSETA after the tender closing date and time.

Queries related to this tender are to be sent to scm01@sassetta.org.za

NB: The SASSETA logo and other intellectual property rights are owned by SASSETA and are protected by applicable intellectual property laws. Unless authorized in writing, you are prohibited from using the SASSETA logo or any of its intellectual property in any manner whatsoever. Any unauthorized use of the SASSETA Logo may result in legal action.

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigation.

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

SECTION A

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

SECTION B

1. Invitation to Quote (SBD 1)
2. Pricing Schedule (SBD 3.3)
3. Declaration of Interest (SBD 4)
4. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
5. Submission Checklist
6. General Conditions of Contract (Annexure A)

NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.

1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

1.1 FRAUD AND CORRUPTION

- 1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

1.2 COMPULSORY BRIEFING SESSION

- 1.2.1 There will be no briefing session for this Request for Proposal

1.3 CLARIFICATIONS/QUERIES

- 1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Lebo Hlombe** at scm01@sasseta.org.za by 12h00 on the **13 November 2023**. The bid **number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.**

1.4 SUBMITTING BIDS

- 1.4.1 Proposals to be submitted electronically only via email to:
stipend@sasseta.org.za (maximum size of the email 30MB)
- Bidders are advised to compress their email submission(s) to a maximum of 30MB file/folder. **Any submission(s) exceeding 30MB will be automatically rejected by the server.**
 - Submission(s) that exceed 30MB can be made through the method of, WeTransfer, google drive etc. **Bidders are advised NOT to set expiry date on the submission(s) made.**
 - Bidders are advised to double check their submission(s) before responding to the bid.

❖ Closing date and time: **17 November 2023 @11h00**

1.5 LATE BIDS

- 1.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.

1.6 PRICING

- 1.6.1 Service Providers are requested to provide an all-inclusive cost of this project assignment on SBD 3.3

Where the contract requires the successful bidder to travel to a venue different from SASSETA, the following travel and disbursement processes will be undertaken:

- Claim travel mileage costs applicable to this contract as per the Department of Transport rates
- Book only economy-class flights
- Book Group A hire cars, otherwise Group B are to be used for Service Providers outside of Gauteng.
- Utilise cost-effective mode of transport such as Uber/Taxify/Gautrain or

- shuttle services when traveling to and from the airport.
- Book only Bed and Breakfast, Hotels, or other equivalent accommodations up to a Rand value of R1 400/ per night per person (including dinner, breakfast, and parking).
- Submit all applicable invoices/receipts for the travel undertaken and also, a google map of the trip where travel by private car was undertaken for payment.
- All travel to be approved by SASSETA before being undertaken

1.7 NEGOTIATION

- 1.7.1 SASSETA has the right to enter into a negotiation with a prospective service provider.
- 1.7.2 A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties.

1.8 REASONS FOR REJECTION

- 1.8.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.
- 1.8.2 SASSETA shall disregard the bid of any bidder if that bidder, or any of its directors:
 - 1.8.2.1 have abused the Supply Chain Management systems of SASSETA.
 - 1.8.2.2 have committed proven fraud or any other improper conduct in relation to such systems.
 - 1.8.2.3 have failed to perform on any previous contract and the proof exists.
 - 1.8.2.4 Such actions shall be communicated to the National Treasury.

2. TERMS OF REFERENCE

2.1. INTRODUCTION AND BACKGROUND

- 2.1.1. SASSETA was established on 1 July 2005. It is one of the twenty-one Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's license has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training.
- 2.1.2. The Skills Development environment requires regular financial support to learners undergoing training in the form of stipends that are paid based on the attendance of class and workplace. SETA stipends are usually paid via Training Providers and Employers, in arrears, on the submission of manual attendance registers or claims. The payments to learners are via direct deposit into the learner's bank accounts.
- 2.1.3. SASSETA is in the process of changing the system of learner management and stipend disbursement by implementing a real-time learner attendance monitoring system that yields accurate and prompt stipend reports for training projects. It is SASSETA's further intention to operationalize the learner management and stipend disbursement direct to beneficiaries in the most cost-effective and efficient manner and eliminate incidences of incorrect, late or non-payment of stipends.

2.2. PURPOSE

- 2.2.1. The purpose of this request for proposals to appoint a panel of two (2) service providers to render a learner management and stipend disbursement solution to SASSETA from the date of appointment until 31st March 2030
- 2.2.2. SASSETA requires a panel of two (2) service providers to implement the national rollout of the learner attendance monitoring system, administration of attendance-based payment calculation and disbursements on a monthly or other regular timeframes as stipulated with the requisite reporting and financial stewardship responsibility for a period of 7 years.
- 2.2.3. The system is required to centrally generate attendance and stipend reports. It is SASSETA's intention for the service provider to pay stipends and other allowances to each learner into the learner allocated account.

2.3. SCOPE OF WORK, SERVICES AND DELIVERABLES REQUIRED

- 2.3.1. In order to achieve the above-mentioned objectives, SASSETA seeks to appoint two (2) service providers – with the requisite procurement, administrative, technical knowledge and implementation capabilities – that will undertake the end-to-end monitoring system rollout, stipend calculation and disbursement administration:
 - a) A national rollout and supply of a mechanism that can be used to uniquely identify individual learners and record attendance;
 - b) Monthly administration and weekly reconciliation of stipends to qualifying recipients;
 - c) The solution must be able to provide read-only access to SASSETA staff.
 - d) Monthly reporting on learner/beneficiary attendance and disbursements;

- e) SASSETA will rent out the solution and devices.
- f) The service providers will be required to provide support and maintenance for the duration of the contract.
- g) The devices to have internet connection for the entire duration of the contract.
- h) The solution should allow for future system modifications and integration with other SASSETA systems.
- i) The solution must be able to manage the complications of learners changing bank accounts including declined payments.
- j) The solution must be able to produce reports as and when required with supporting evidence.

2.3.2. The Solution/system to meet the following functionalities:

A. Minimum Demonstrable Competencies/ (Pre-requisites) and Deliverables of the Service Provider/s

- (i) National rollout to selected current and future training projects within strict timelines.
- (ii) Demonstrate the on-take and enrolment of existing and future learners.
- (iii) Demonstrate the terminations of the learners.
- (iv) Efficient and effective learner accounts administration and reporting.
- (v) Risk management mechanisms that will reimburse the organization in case of financial loss due to fraud and/or security breaches.
- (vi) The service provider must have adequate resources to identify and resolve any administration queries relating to the payments (helpdesk).
- (vii) The service provider will be liable for any errors committed.

B. Enrolment and attendance monitoring mechanism/device

- (i) Scan using unique biometric capabilities (e.g., fingerprint, eye, palm, facial recognition, etc.).
- (ii) The system must be able to detect abnormalities (e.g., fake prints, fraud, etc.).
- (iii) Have wireless capabilities - the device must be able to connect to the internet and transmit attendance logging in real time i.e., it must be Wi-Fi enabled and cellular data enabled.
- (iv) Compatible with android/iOS/windows and major operating systems.
- (v) The device must be able to operate without electricity (e.g., batteries, solar power, etc.).
- (vi) The device must be able to work under extreme conditions (e.g., high temperature and all-weather conditions).

C. Payment Platform

- (i) The ability to handle very large volumes of transactions, consisting of up to a minimum of 7 million value in stipends per month.
- (ii) The solution must be secure. The security features of the solution must have the ability to stop payments and block/unblock and flag accounts in cases of fraud, death, etc.
- (iii) Processes to identify and deal with uncleared /rejected payments.
- (iv) The platform must identify all payment entries through a unique reference number.
- (v) Timely and regular reporting on all successful payments / transfers.
- (vi) The platform must be able to accept files in the standard BankServ.format, CSV format and any other related formats.
- (vii) Ability to integrate with other SASSETA systems.

D. The below services will be deemed to be included in the Bidders' price for the duration of the contract and may not be charged separately:

- (i) Change management pertaining stipend administration, including process mapping and learner/user guides for Training Providers and Learners.
- (ii) User training (once off).
- (iii) National Roll-out of projects on SASSETA funded training projects.
- (iv) Monthly reporting to SASSETA on all payments made to the learners.

E. Disaster Recovery and Protection of Information

- (i) SASSETA need the assurance that all the data and systems that are used to process its learner management and stipend disbursement business processes are protected against any form of loss or risk including but not limited to accidental loss, malicious loss, theft, unauthorised access, sabotage and most importantly privacy.
- (ii) The service provider is required to provide a detailed proposal on how these risks can be mitigated to ensure that there is minimal or no damage such occurrence take place.
- (iii) The service provider to ensure compliance with the Protection of Personal Information Act (POPIA).

2.4. SUBMISSION REQUIREMENTS

- 2.4.1. Bidders to submit a minimum of two (2) reference letters that indicate the entity's ability to render management and stipend disbursement solution. **NB: Three (3) or more reference letters that indicate the entity's ability to render a management and disbursement solution will score maximum points.**
- 2.4.2. Bidders to submit a comprehensive CV of the team leader demonstrating management of a minimum of two (2) successful assignment / projects in r management and stipend disbursement solution. **CV of the team leader demonstrating management of three (3) or more successful assignments / projects in management and stipend disbursement solution will score maximum points.**
- 2.4.3. Bidders to submit the comprehensive CV of the financial resource demonstrating a minimum of two (2) years' experience as an Accountant. **NB: CV demonstrating three (3) or more years of experience will score maximum points.**
- 2.4.4. Bidders to submit a comprehensive CV of the System Developer to demonstrate a minimum of two (2) successful system development or modification assignments. **NB: CV of a System Developer demonstrating three (3) or more years successful system development assignments will score maximum points.**

2.5. TIMEFRAMES FOR DELIVERY OF THE WORK

- 2.5.1. The successful service providers will be appointed until 31st March 2030;
- 2.5.2. The bidder to ensure the onboarding of learners is completed within a month per project; and
- 2.5.3. Successful service providers will be required to enter into a Service Level Agreement (SLA) with SASSETA

2.6. PRICING

- 2.6.1. Service Providers are requested to provide an all-inclusive price of this project from initiation to completion on SBD 3.3

2.7. ACCOUNTABILITY AND REPORTING

- 2.7.1. Progress reports should be provided to the Learning Program Managers monthly, highlighting challenges experienced, recommendations and actions taken to resolve the incidents.

2.8. INTELLECTUAL PROPERTY

- 2.8.1. The service provider will be contracting with SASSETA. All data of this project, in whatever format raw or analysed, will be confidential information for utilisation by SASSETA. All information and documents received from SASSETA is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the SLA.

2.9. PROTECTION OF PERSONAL INFORMATION ACT

- 2.9.1. All Service Providers are to take note of the implications of POPI Act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:
- 2.9.1.1. All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.
 - 2.9.1.2. The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA records management policies as prescribed by the national archives Act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.
 - 2.9.1.3. SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of information provided.
 - 2.9.1.4. SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

3. PRESCRIBED SELECTION CRITERIA

3.1 Compliance requirements

3.1.1 All bids duly lodged will be evaluated to determine compliance with bidding requirements and conditions.

3.2 Conditions for selection/short listing

3.2.1 All submissions will be evaluated as follows:

3.2.1.1 Phase 1 – Required items, Service Providers to:

- Submit their responses/bidding documents by the closing date and time. **Responses/bidding documents submitted after the date and time will be disqualified from further evaluation.**
- Submit proof of bank sponsorship from any other commercial bank. **Non-submission will lead to automatic disqualification.**
- Submit proof of Company Professional Indemnity at a minimum of R7 000 000. **Non-submission will lead to automatic disqualification.**
- Be compliant to Payment Card Industry Data Security Standard (I- DSS). Bidders to submit the confirmation of the compliance. **Non-submission will lead to automatic disqualification.**
- complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD1, SBD3.1, SBD4, SBD 6.1.
- Bidders to be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for proposal. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with your proposal.

3.2.1.2 Phase 2 – Functionality evaluations

- All acceptable proposals from phase 1 will be evaluated on the criteria provided in the table below. The proposals of all service providers will be rated on a scale of 0 to 2 as follows:
 - 0: Required document/item not submitted /Unacceptable, does not meet set criteria
 - 1: Satisfactory should be adequate for stated element
 - 2: Very good, above average compliance to the requirement

PROPOSED SELECTION CRITERIA

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
	Rating out of 2	Evaluation criteria		
Suitability of the proposed bidder				
Bidders to submit a minimum of two (2) reference letters that indicate the entity’s ability to render a learner management and disbursement solution. NB: Three (3) or more reference letters that indicate the entity’s ability to render a learner management and disbursement solution will score maximum points.	0	Bidder did not submit reference letters or bidder submitted one (1) reference letter that indicates the entity’s ability to render a learner management and disbursement solution.	25	
	1	Bidder submitted two (2) reference letters that indicate the entity’s ability to render a learner management and disbursement solution.		
	2	Bidder submitted three (3) or more reference letters that indicate the entity’s ability to render a learner management and disbursement solution.		
Suitability of the team members				
Bidders to submit a comprehensive CV of the team leader demonstrating management of two (2) successful assignments / projects in management and disbursement solution. NB: CV of the team leader demonstrating the management of three (3) or more successful assignments / projects in learner management and stipend disbursement solution will score maximum points	0	The CV of the team leader not attached, or CV does not demonstrate managing successful assignment / projects in management and disbursement solution.	25	
	1	The CV of the team leader demonstrates managing of two (2) successful assignments / projects in management and disbursement solution.		
	2	The CV of the team leader demonstrates managing of three (3) or more successful assignments / projects in management and disbursement solution.		
Bidders to submit a comprehensive CV of a Financial resource demonstrating a minimum of two (2) years of experience as an Accountant. NB: CV demonstrating three (3) or more years of experience will score maximum points	0	The CV not attached, or CV of the Financial resource does not demonstrate two (2) or more years of experience as an Accountant.	25	
	1	The CV of the Financial resource demonstrates two (2) years of experience as an Accountant		
	2	The CV of the Financial resource demonstrates three (3) or more years of experience as an Accountant.		

Bidders to submit a comprehensive CV of the System Developer demonstrates a minimum of two (2) successful system development or modification assignments. NB: CV of a System Developer demonstrating three (3) or more years successful system development assignments will score maximum points	0	The CV of the system developer not attached, or CV does not demonstrate relevant experience	25	
	1	The CV of the System Developer demonstrates two (2) system development or modification assignments		
	2	The CV of the System Developer demonstrates three (3) or more system development or modification assignments		
TOTAL SCORE	100		100	

N/B: Bidders need to obtain a minimum of 80% for functionality for them to be evaluated further on due diligence. Bidders who do not meet the required technical functionality threshold will be disqualified from further evaluation.

(I) DUE DILIGENCE – TO ASSESS THE QUALITY OF WORK UNDERTAKEN AT ONE PREVIOUS CLIENT OF THE SHORTLISTED BIDDER WHERE A SIMILAR SOLUTION WAS RENDERED

SASSETA reserves the right to select the site where due diligence will be undertaken from one of the reference letters submitted. Service Providers are required to make arrangements with all their referees for a site where the biometric system has been fully implemented. SASSETA will also view a live system that manages and disburses funds.

ELEMENT		FUNCTIONALITY EVALUATION	Weight
Quality and Authenticity of previous system implemented	Rating out 1	Evaluation criteria	
<ul style="list-style-type: none"> • The system has been implemented and meets the elements below: <ul style="list-style-type: none"> ✓ Enrolment and attendance monitoring mechanism/device ✓ Scan using unique capabilities. ✓ The system must be able to detect abnormalities (e.g. facial features) ✓ System / software should have capacity to integrate 	0	The system has not been implemented and does not meet the SASSETA requirements and expectations.	100
	1	The system has been implemented and meets the SASSETA requirements and expectations.	

<ul style="list-style-type: none"> ✓ Have wireless capabilities - the device must be able to connect to the internet and transmit attendance logging in real time i.e. it must be Wi-Fi enabled and cellular data enabled ✓ Compatible with android/IOS/windows and major operating systems ✓ The device must be able to operate without electricity (e.g. batteries, etc.) ✓ Payment Platform <ul style="list-style-type: none"> ✓ Processes to identify and deal with uncleared /rejected payments. ✓ The platform must identify all payment entries through a unique reference number. ✓ Timely and regular reporting on all successful transfers. ✓ The platform must be able to accept files in the standard BankServ or CSV format (100 points) 			
TOTAL SCORE	100	TOTAL SCORE	100

NB.: Due Diligence – will be scored out of 100 on its own and bidders are required to obtain 100% for them to be shortlisted further. Bidders who do not meet the required threshold will be disqualified from further evaluation.

3.2.1.3 Phase 3 – Price and Specific Goals

- **The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where 80 points will be allocated to price and 20 points for Specific Goals as follows:**

Evaluation Criterion on Price and BBBEE	
Relative competitiveness of proposed price	80
Specific Goals	20
TOTAL FOR PRICE AND PREFERENCE	100

3.3 ADJUDICATION OF BID

3.3.1 The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder(s) will usually be the service provider scoring the highest number of points or it may be a lower scoring bid based on firm, verifiable and justifiable grounds, or no award at all.

PART A - INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFP/SASSETA/23241104/1	CLOSING DATE:	17 November 2023	CLOSING TIME:	11h00
DESCRIPTION	Appointment of a panel of two (2) service providers to render a learner management and disbursement solution to SASSETA for a period ending on 31st March 2030				
PROPOSALS TO BE EMAILED:					
Proposals to be submitted electronically only via email to stipend@sasseta.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms. Lebo Hlombe		CONTACT PERSON	Ms. Lebo Hlombe	
E-MAIL ADDRESS	scm01@sasseta.org.za		E-MAIL ADDRESS	scm01@sasseta.org.za	
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 PART B:3]	
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

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO 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 WWW.SARS.GOV.ZA.
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 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.

NAME OF SIGNATORY

SIGNATURE OF BIDDER:

N/B.: If a Company has one director as listed on CSD, the one Director to sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

N/B.: If the Company has more than one Director as listed on CSD, a signed Company Resolution to be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

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

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO.: RFP/SASSETA/23241104/1
CLOSING TIME: 11h00	CLOSING DATE: 17 November 2023

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



ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. Bidders are required to:

- a) Refer to the attached (Annexure C) excel document for pricing purposes.
- b) Ensure that all items indicated on (Annexure C) are quoted for.
- c) Any alteration or failure to quote on the supplied Annexure C will lead to automatic disqualification.

R..... (TOTAL COST – incl. VAT FOR A PERIOD OF SEVEN (7 YEARS))

For the purposes of evaluations and price comparisons, the total costs should be inclusive of Fixed once-off costs and Ad-hoc costs. Bidders are encouraged to confirm their price calculations before submission.

NB.: SASSETA is looking at leveraging cost by applying economies of scale on the number of learners to be allocated per category. Bidders to provide a cost for one (beneficiary) on all the categories mentioned on Annexure C.

The service provider will be responsible for arranging their travel, which will be reimbursed at cost by SASSETA. Rate per kilometer travelled will be reimbursed as per Department of Transport rates.

Bidders are to complete the names and surnames of the proposed team on this assignment and ensure that comprehensive CVs of these members are attached to the proposal as follows:

NO.	ROLE IN THE TEAM	NAME AND SURNAME (Bidders to indicate one (1) name per role below)	IS THE CV ATTACHED (Circle the response below)
1.	1 X Team Leader/Project Manager		Yes/No
2.	1 X Financial resource		Yes/No
3.	1 X System Developer		Yes/No

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly Authorised Delegate)

BIDDER’S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder’s declaration

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

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

Full Name	Identity Number	Name of State institution

N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

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

2.3.1 If so, furnish particulars:

3. DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium¹ will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

.....

¹ 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.

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

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

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

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

The applicable preference point system for this quotation is the **80/20** preference point system.

- a) The lowest acceptable quotation will be used to determine the accurate system once quotations are received.

1.3 Points for this quotation (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:

1.5 The maximum points for this quotation are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

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

1.7 The organ of state reserves the right to request a bidder, either before a quotation 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. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for the price of the quotation under consideration

Pt = Price of the quotation under consideration

Pmin = Price of lowest acceptable quotation

3.2 POINTS AWARDED FOR SPECIFIC GOALS

- a) In terms of Regulations 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 quotation.
- b) For the purposes of this quotation, the bidder 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 bid:

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

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system)	Bidders to record the number of points claimed in the rows below (80/20 system) (To be completed by the bidder)
Atleast 51% Black People Ownership(>	10.00	
Atleast 30%Black Women Ownership	5.00	
The Promotion of Small Medium and Micro Enterprises (SMMEs)	5.00	
Total	20.00	

NB: Specific goals will not be rewarded to bidders who do not record their points in the table above

DECLARATION WITH REGARD TO COMPANY/FIRM

3.3 Name of company/firm.....

3.4 Company registration number:

3.5 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]

3.6 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 quotation, 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 bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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 BIDDER(S)
SURNAME AND NAME:
DATE:
ADDRESS:

DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:

- a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
- b) Certified copy/ies of Identity documents of the Company Directors
- c) CSD report
- d) Shareholder Certificates

NB.: Non-submission of the documents required above will lead to specific goal points NOT Being awarded.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly authorised Delegate. A signed Company Resolution must be submitted).

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigation.

BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:

NO.	DETAILS - Bidders are to set out their bid in the following format:	TICK BY BIDDER
1.	Part 1: Completed and signed the invitation to bid document (SBD 1) To be signed by a duly Authorised Delegate.	
2.	Part 2: Completed and signed pricing schedule (SBD 3.3) To be signed by a duly Authorised Delegate.	
3.	Part 3: Completed and signed the Bidder's disclosure (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document).</i> To be signed by a duly Authorised Delegate	
4.	Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1) To be signed by a duly Authorised Delegate. Not claiming points as per SBD 6.1 will lead to Specific Goals points not awarded	
5.	Part 5: Submitted the General Conditions of Contract (initialed each page)	
6.	Part 6: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration	
7.	Part 7: Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3	
8.	Part 8: Proof of bank sponsorship from any commercial bank. Non-submission will lead to automatic disqualification	
9.	Part 9: Proof of Company Professional Indemnity of +-R7 000 000	
10.	Part 10: It is a requirement that the bidder is compliant to Payment Card Industry Data Security Standard (PCI-DSS). Bidders to submit the confirmation of the compliance. Non-submission will lead to automatic disqualification	
11.	Part 11: The Bidding Company to submit a minimum of two (2) reference letters that indicate the entity's ability to render a learner management and stipend disbursement solution. Reference letters must be on the client's letterhead, signed and clearly detailing the scope of work, duration and impression the client has with the service provider.	
12.	Part 12: CV of the team leader demonstrating management of two (2) successful assignments / projects in management and disbursement solution.	
13.	Part 13: CV of the Financial resource demonstrating a minimum of two (2) or more years of experience as an Accountant.	
14.	Part 14: CV of the System Developer to demonstrate a minimum of two (2) successful system development or modification assignments	
15.	Part 15: Bidders to submit the following documents. Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT being awarded.	
	Valid Companies and Intellectual Property Commission (CIPC) Company registration documents	
	Certified copy of Identity document of company directors	
	declaration letter signed by the bidder	

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