

THE APPOINTMENT OF THE RESOURCE MOBILISATION CONSULTANT



BID SPECIFICATION

PROJECT DESCRIPTION:

THE APPOINTMENT OF THE RESOURCE MOBILISATION CONSULTANT

TENDER NO: MBC/01/2023

Date: 28 September 2023

SUBMISSION TO BID SPECIFICATION COMMITTEE FOR APPROVAL.

BSC MEMBERS	SIGNATURE	DATE OF APPROVAL
	
Chairperson		
SCM		
Technical (End User)		
Legal Department		

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1. Tender Notice and Invitation to Tender

The University of Venda seeks to appoint a highly competent company/individual to assist in resource mobilization on a commission basis. Proposals are invited from suitably qualified companies or individuals with an excellent track record at both national and international levels.

A non-compulsory clarification meeting will be held as per the tender invitation. The closing time for receipt of tenders is as per the tender invitation. No telegraphic, telephonic, telex, facsimile, e-mail, and late tenders will be accepted.

The tender box is situated at the **Main Entrance Gate at the University of Venda, University Road, Thohoyandou.**

Tenders may only be submitted on the tender documentation that is issued; alternative tenders are not permitted. All ***queries must be addressed to the Supply Chain Management via email to univentenders@univen.ac.za***

Requirements for sealing, addressing, delivery, opening and assessment of tenders are stated in the Tender Data.

1.1. Background, Introduction and Objectives

UNIVEN seeks to appoint a reputable Resource Mobilization Consultant to provide Fundraising and resource mobilization services to the University for a period of 3 years.

SERVICE PROVIDER'S TERMS OF REFERENCE

It is the intention of UNIVEN to enter into a formal Service Level Agreement with the successful Service Provider(s) to provide the services described hereunder.

The Terms of Reference (TOR) would serve to guide the process of selecting and appointing a qualified service provider by ensuring a match between the specification requirements of the UNIVEN as an entity and the knowledge and experience of the service provider.

These ToRs and the service provider's proposal will form the basis of the service level agreement to be entered into between the parties.

Completion of Tender Documents

- (i) The original tender document must be completed fully in black ink and signed by the authorized signatory to validate the tender. The declaration must be completed and signed by the authorised signatory and returned. Failure to do so will result in the disqualification of the tender.
- (ii) Tender documents may not be retyped. Retyped documents will result in the disqualification of the tender.
- (iii) The complete original tender document must be returned. Missing pages will result in the disqualification of the tender.
- (iv) No unauthorised alteration of this set of tender documents will be allowed. Any unauthorised alteration will disqualify the tender automatically. Any ambiguity has to be cleared with the contact person for the tender before the tender closure.

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BUSINESS INFORMATION

Title (Prof./Dr/Mr/Mrs/Ms and Surname)

Business Trading Name (as per CIPRO)

Previous Name of Business (if Applicable)

PHYSICAL ADDRESS OF THE BUSINESS

POSTAL ADDRESS OF BUSINESS

CONTACT DETAILS

Office

Mobile

Accounts Department

Business Email

Business Registration Number

Tax Number

VAT (if applicable)

Do you have any previous Univen Experience? If so, elaborate.

Authorised Signature

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MANDATORY SUBMISSIONS – STAGE PLEASE COMPLETE THE TABLE BELOW AND ATTACH SUPPORTING DOCUMENTS

PLEASE COMPLETE THE TABLE BELOW AND ATTACH SUPPORTING DOCUMENTS

		Y/N	Office use only	Kindly Indicate Page No
1	Fully Initialed & Completed tender document pages and to sign where signature is needed			
2	Board Resolution: Certificate for authority for signature			
3	Signed JV Agreement (where applicable)			
4	Comprehensive Company Profile			
5	Valid SARS Tax Pin			
6	ID Copies of all active Company Directors			
7	Proof of Business Address (municipality bill or lease agreement with physically address)			
8	Bank Account Confirmation Letter			
9	Detailed CSD report			
10	Signed Declaration of Interest			
11	Proof of Tender Document Purchase			
12	Financial details, recent 3 years (2020/2021, 2022&2023) Audited financial statements and bank references. If the company is required by law to be audited, we need audited annual financial statements for the past 12 months or audited financial statements since the establishment of the company if the company was established during the past 3 years. If the company is not required by law to be audited, please provide us with a letter from a registered accountant stating that you are not required to be audited and the reasons thereof.			
13	Completion of the Standard Bidding Forms (SBD 4)			
14	Proof of Professional Indemnity insurance (R10 000 000)			

All relevant sections complete and signed and all pages of tender document initialled by authorized signatory. Proof attached that signatory is duly authorized to enter into contractual agreement with University of Venda on behalf of the organization

DECLARATION

I declare that all relevant documentations have been included with the bid document and all the tender conditions have been adhered to.

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.....

.....

Name Signature Date

.....

Capacity Name of Firm

2. PROHIBITION OF RESTRICTIVE PRACTICES

2.1 In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder (s) is / are or a contractor(s) was / were involved in collusive bidding (or bid rigging).

2.2 If a bidder(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

2.3 If a bidder(s) or contractor(s), has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered, and / or terminate the contract in whole or part, and / or restrict the bidder(s) or contractor(s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the bidder(s) or contractor(s) concerned.

3. RIGHTS RESERVED

Bidders should take note that UNIVEN reserves the right to negotiate terms and conditions after the selection of the successful tender. UNIVEN reserves the right to accept any proposal submitted or reject all proposals. UNIVEN may request clarification in writing on any aspect of a response to this invitation.

4. PARENT/SUBSIDIARY COMPANY

A Company shall be defined as a legal persona and tender documents submitted shall reflect those of the registered Company in terms of the Companies Act. A Subsidiary Company tendering shall not submit the Parent Company's information in terms of Detailed CSD report, valid SARS tax Pin and financial statements. All Directors of the tendering Company, all Members of the Close Corporation and partners in a Partnership or Joint

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Venture must enclose a certified copy of their Identity Document and proof of their share of ownership.

5. TAXES AND DUTIES

No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid SARS must have certified that the tax matters of the preferred bidder are in order, i.e. a valid SARS Tax Pin .

6. DECLARATION OF INTEREST

The Tender document must include a signed declaration of interests.

7. CONSORTIUMS AND JOINT VENTURES

Only Consortiums and Joint Ventures legally formed and in existence for a minimum of three years will be considered

8. SUBMISSION OF FINANCIAL RECORDS

In terms of New Companies Act, Tenderer to submit Audited Financial Statements (AFS) most recent AFS not older than 12 months. Certain Companies may not require Audited Financial Statements such as Sole Traders, Partnerships and Close Corporations, as long as they abide within the New Companies Act. The Financial Statements are to be attested by a qualified Chartered Accountant (CA) Registered Audit for AFS that required to be audited.

9. VALIDITY PERIOD

Bids shall remain valid for 120 one hundred and twenty days after the tender closure date. During the validity window period of the tender, should the Tenderer withdraw this tender or is unable to meet contractual requirements, the University may exercise additional remedies available in its option, to withdraw or cancel the agreement.

10. ACCEPTANCE OR REJECTION OF A TENDER

The University reserves the right to withdraw any invitation to tender and/or to re-advertise or to reject any tender or to accept a part of it. The University does not bind itself to accepting the lowest tender or the tender scoring the highest points.

11. PRICES

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Prices charged by the Service Provider for goods delivered and services performed under the contract shall not vary from the prices quoted in the bid document, with the exception of any price adjustments authorized or by the purchaser's request for bid validity extension, as the case may be.

12. PROMOTION OF ACCESS TO INFORMATION ACT 2 OF 2000

In relation to section 37 (1) (a) (b) and s9 (b) (i) of this Act, the Bidder shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only as far as may be necessary for purposes of such performance.

13. LEGITIMACY OF INFORMATION

Bidders declare information furnished in this tender to be precise, accurate and bonafide. In the event where a contract has been awarded on the strength of the information furnished by the bidder which, after the conclusion of the relevant agreement, is proved to have been incorrect, the University may, in addition to any other legal remedy it may have, recover from the contractor all costs, losses or damages incurred or sustained by the University as a result of the award of the contract.

14. NATURE OF SERVICE

The nature of service the University enters with the successful bidder is based on the price offered and accepted for the duration of the contract. In the event that prices increase due to external environmental factors such as Industry factors in relation to increase to International prices.

15. TERMS OF CONTRACT

The term of the contract will be for **three years**, the contract will however be reviewed on an annual basis after an evaluation of the performance of the Service Provider has been undertaken by the University's management. At the expiry of the contract, the contract may be extended by mutual agreement until the University invites tenderers to bid on the tender of this nature.

15.1 TERMS & CONDITIONS OF TENDER

- 1) The University reserves the right to reduce or increase the total quantity of items required in the tender.
- 2) The successful tenderer will be required to allow University personnel to carry out reference checks about his/her performance elsewhere before a tender is awarded.
- 3) The highest scored bidder would not necessarily have to be appointed by Univen and Univen as such reserves the right to appoint any or no one at all.
- 4) No sub-service providers/sub-contracting will be allowed.
- 5) The price should be vat inclusive at 15%
- 6) The tender submitted must remain Valid for 120 days after closing date
- 7) All returnable documents must be in a separate file, clearly indexed and separated by marked sheets
- 8) Initials must be on all pages in the tender document
- 9) All proposals are to be sealed. No open proposal will be accepted
- 10) All proposals are to be clearly marked with the Project number and the name of the bidder
- 11) Each bidder to submit 2 files i.e. Tender Document and List of Returnable Documents (clearly separated by file dividers)
- 12) No tender will be considered after the closing date and time.
- 13) Tender Box will be opened in public straight after the closing time
- 14) The proposal shall be valid for a minimum of 4 months (120 days) calculated from the closing date.
- 15) Appointment as a successful bidder shall be subject to parties agreeing on mutually acceptable contractual terms and conditions.
- 16) In the event that parties are failing to reach an agreement, Univen reserves the right to appoint an alternative supplier.
- 17) No regret letters will be sent to unsuccessful bidders.
- 18) Any enquiry regarding this bid invitation and specification shall be submitted in writing to tenders@univen.ac.za with tender number as reference or subject.
- 19) Enquiries shall only be entertained until 5 working days before the closing date of the tender.
- 20) All documentation submitted in response to this tender must be in English
- 21) Univen reserves the right to:
 - a. Extend the closing date through the same medium of communication used for the invitation.
 - b. Extend the tender validity period before the expiry date of the original validity period. This will be done in writing to all bidders.
 - c. verify any information contained in the tender proposal.
 - d. Request any further documentary proof regarding any declaration
 - e. Award this tender as a whole or in part.
 - f. Cancel or withdraw this tender as a whole or in part.
- 22) The contract will be reviewed annually based on performance where applicable.
- 23) The Service Provider will be required to provide proof that he/she has the necessary expertise, experience and knowledge in resource mobilization.
- 24) The University reserves the right to reduce or increase the total quantity of items required in the tender.
- 25) It will be expected that the prices will be competitive and comparable with similar enterprises.

16. SCOPE OF WORK

This request provides for a Proposal that should meet the requirements as detailed in the Technical Section as well as to provide a resource mobilisation methodology as a functional requirement.

- The Resource mobilisation activities shall be conducted in accordance with the accepted practice of fundraising.
- Resource mobilisation shall be done Nationally and Internationally.
- The contractor will be required to plan and manage the identified resource mobilization activities in liaison with the Director of Marketing Branding and Communication/Deputy Vice-Chancellor of Corporate Services.
- The contractor will recommend a resource mobilization strategy for identified projects with the Director of Marketing Branding and Communication/Deputy Vice-Chancellor of Corporate Services before approaching potential donors.
- The contractor will be responsible for all written material that will form the basis of the resource mobilization/fundraising project from which letters, concept papers, proposals, and other documents can be developed as and when required for the campaign.
- The contractor will be required to liaise with the Director of Marketing, Branding and Communication who will be the repository of all relevant documentation, resources, and any other information required to optimally run the campaign.
- The contractor will provide a monthly report on all activities performed to the Director of Marketing Branding and Communication/Deputy Vice-Chancellor of Corporate Services/Manager: Advancement Unit.

17. TECHNICAL SPECIFICATIONS

17.1 REQUEST FOR PROPOSAL

Location for UNIVEN:

Mphephu Drive, Opposite
Khoroni Hotel
Thohoyandou
0950

Hours of Operation

UNIVEN office hours: 08:00 – 16:30 Monday to Friday

17.12 Working Papers

17.12.1 The following requirements with regards to the working papers will apply:

- All leads, resources and contacts developed or secured remain the property of the university.

17.14 PACKAGED APPROACH

17.14.1 UNIVEN would prefer to conclude an agreement with a Bidder who is able to provide a complete forensic audit and accounting service. The successful Bidder will always be expected to be visible during the tenure of the contract. The successful Bidder will have access to all information of UNIVEN within the normal working hours of UNIVEN.

17.15 FEES AND PAYMENT

17.15.1 Fees will be paid based on resources utilized on a time and cost basis, using the rates as submitted in the financial proposal and agreed in the service level agreement to be concluded with the successful bidder.

17.16 VALIDITY OF PROPOSALS

The Bidder is required to confirm that it will hold its proposal valid for 120 days from the closing date of the submission of proposals, during which time it will maintain without change, the personnel proposed for the services together with their proposed rates.

PART 3 - EVALUATION PROCEDURES AND BASIS OF SELECTION

18. EVALUATION PROCEDURES

18.1. METHODOLOGY

The evaluation of proposals will be divided into two (2) phases:

Phase 1: Pre-qualification check

The pre-qualification check requires verification of compliance with: Hurdle requirements as described in the proposal document; Mandatory documentation – whether all required documentation and/or certification have been included.

Note: No points are allocated to this phase; however, proposals that do not meet the pre-qualification requirements will not advance to the next phase of the evaluation process.

Phase 2: Evaluation of proposals based on *Functionality* and the Specific Goals Preference point system as criteria: This phase of the evaluation is conducted in two (2) stages – first *functionality* will be assessed and then in accordance with 80/20 preference point system.

Stage 1: Evaluation of functionality

The evaluation criteria for functionality will take into account the track record and experience, expertise of staff and proposed methodology of the proposer, as well as the Proposer's technical *capacity* and *ability* to execute and maintain a contract.

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Note: No proposal will be considered further unless the *minimum qualifying score/percentage* for functionality has been achieved.

Stage 2: Evaluation in terms of the 80/20 preference point system

Only proposals that achieved the *minimum qualifying score/percentage* for functionality will be considered further in terms of the 80/20 preference point system.

The formulae to be utilized in calculating points scored for the preference point system are included in this document.

Step 1 will be the calculation of points for price, where the lowest proposal will score 80 points for price, while proposals with higher prices will score lower points for price on a pro-rata basis.

The following formula will be utilized to calculate the points for price in respect of proposals with a Rand value below R50 000 000 (all applicable taxes included):

$$P_s = 80 (1 - P_t - P_{min} / P_{min})$$

Where:

P_s = Points scored for comparative price of proposal or Proposal under consideration;

P_t = Comparative price of proposal or Proposal under consideration; and

P_{min} = Comparative price of lowest acceptable proposal or Proposal.

- After the closing date of the bid invitation, appointed evaluation committee members of the University and possibly other external experts (when necessary) will evaluate the proposals of the bidders.
- The committee will individually evaluate each of the bid proposals received against the appointed criteria as provided for in Preferential Procurement Policy Framework Act of 2005 (As amended).

Prospective bidders must note the following:

- UNIVEN may request additional information, clarification, or verification in respect of any information contained in or omitted from the proposal. This information will be requested in writing.
- UNIVEN may conduct a due diligence on any Service provider, which may include interviewing customer references or other activities to verify a Service provider's information and capabilities (Including visiting the Service provider's various premises and/or sites to verify certain stated information and in this instance the Service) provider will be obliged to provide UNIVEN with all necessary access and assistance;
- UNIVEN may shortlist Service providers and may request presentations from short-listed Service providers.
- UNIVEN may enforce whatever measures it considers necessary to ensure the confidentiality and integrity of the contents of the Proposal.
- UNIVEN will evaluate the Proposals with reference to UNIVEN's set and approved evaluation criteria guided by the procurement policy as indicated. UNIVEN reserves the right to appoint a specialist/consultant to assist in performing such evaluations.

All proposals submitted will be evaluated on three categories:

(i) Functionality (technical content)

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(ii) Price

(iii) Rating of Company as per specific goals criteria

Bids are evaluated in accordance with the preferential procurement Policy Framework Act (PPFA) of 2011, using the 80/20 split.

Firstly, the assessment of functionality must be done in terms of the evaluation criteria and the minimum threshold value of 70 points. A bid will be disqualified if it fails to meet the minimum threshold value for functionality as per the bid invitation.

Thereafter, only the qualifying bids are evaluated in terms of the 80/20 preference points systems, 80 points will be used for price only and the 20 points are used Specific Goals Preference point system as criteria .

The formulae to be utilized in calculating points scored for the preference point system are included in this document.

For specific goal evaluation: Kindly submit as indicated on the specific goal table.

Preferential /specific goals.	Number of points allocated (80/20 system)	Means of verification	Supplier name/firm
Black People	6	CSD report and copy of company CIPC registration certificate	
Women	4	CSD report	
Persons with Disability	2	Original or Certified Copy of certificate/confirmation of Disability Status	
Youth	3	CSD report	
Enterprises located in Limpopo Province	5	Recent Municipal account or Local Authority Letter for confirmation of Local	

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Preferential /specific goals.	Number of points allocated (80/20 system)	Means of verification	Supplier name/firm
		Address (not older than 3 months)	
Total score	20		

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The Point's breakdown is as indicated below:

FUNCTIONALITY ASSESSMENT CRITERIA	Weight	Score	Total
Contactable Reference letters of similar projects/works completed by previous/current client confirming contract, contract period, and recommendation.	30		
<p>Company References: Provide three (3) contactable references that are not older than three years. Evidence of prior experience in providing resource mobilisation services.</p> <p>Additional 5 points if company provides similar services to Tertiary Education Institutions in South Africa</p> <ul style="list-style-type: none"> 3 Contactable references verified = (25 points) 2 Contactable references verified = (15 points) 1 Contactable reference verified = (5 points) 			
Track Record and Experience of Firm in Resource Mobilisation	20		
<p>Bidders are to indicate the years of demonstrable experience of the resource mobilisation partner: Tenderers are required to submit full details of, and reliable contactable references for relevant services which were successfully rendered. Services relevant must be of similar scope, nature and size, concentrated within the last ten (10) years.</p> <p>Positive reference letters and appointment letters of successful services rendered for similar work in the last tender (10) years</p> <ul style="list-style-type: none"> Relevant experience greater than 10 years = (20 points) Relevant experience between 5 and 9 years = (10 points) 			
Expertise of Staff to be placed on this project.	30		
<p>Evidence of the proposed teams experience, skills and qualifications and at least for the following levels:</p> <p>Relevant Professional/Qualification by Key Resources dedicated to the University.</p> <p>Lead partner:</p> <ul style="list-style-type: none"> Equal to or More than 5 years' experience in resource mobilisation =10 			

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- 4 years =8
- 3 years =6
- 2 years and below =0

Resource mobilisation Partner:

- Equal to or More than 5 years' experience in resource mobilisation =10 points
- 4 years =8
- 3 years=6
- 2 below and =0

Manager:

- Equal to or More than 5 years' experience in resource mobilisation=5 points
- 4 years =4
- 3 years below =3
- 2 years and below=0

Assistant Manager:

- Equal to or more than 3 years experience in resource mobilisation =5
- 2 years =4
- 1 year and below =0

OR

- Third year trainee with BCom Business Management/Marketing/ Accounting / =5 points
- Third years trainee with BCom Marketing/Business Management/Accounting / =4 points
- Second year trainee with a BCom Marketing/Business Management/Accounting =3
- First and Second year trainees – with NDip Marketing/Business Management =2 points
- First and Second year trainees – with NDip Marketing/Business Management=1 point
- First and Second year trainees with BCom/Business Management/Administration degree=1 point

Provision of a resource mobilisation methodology 20 points

- Provide a resource mobilisation methodology

Evaluation Criteria

- The total (100%) score is 100 points
- Minimum score required to succeed to the next level is 70%
- Suppliers achieving points below the set 70% shall be disqualified from further assessment.
- Points accumulated at this stage shall NOT be carried forward to the next stage

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A
TOTAL	
% score	
RECOMMENDATION	

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AUXILIARY REQUIREMENTS

19. LOBBYING AND CANVASSING

No lobbying and canvassing by tenderers in any form to staff member or student of the UNIVEN, for the purposes of influencing the evaluation process and awarding of the tender, will automatically disqualify the tenderer from the evaluation process and subsequent consideration.

EVALUATION PROCESS (Continued)

FUNCTIONALITY CRITERIA TO BE COMPLETED ANY INCOMPLETION/ BLANK SPACES WILL RESULT IN ZERO POINT ALLOCATION:

COMPANY REFERENCES

The reference must be current clients that have done business with your company for longer than three years. Additional points will be allocated if Tertiary Education Institution references are provided.

3 Positive References	= 25 points	Maximum 30 points
2 Positive References	= 15 points	
1 Positive Reference	= 5 points	
Additional points Tertiary Institution Positive References	= 5 points	

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Company /University Name	Contact Name	Contact Number	Email Address
1.			
2.			
3.			

Company years of experience in providing similar services (Resource Mobilisation). (Attach Company Profile)	Maximum 10 points
Indicate the number of years of experience Years	Attach Company Profile to Annexure A

Experience and qualification of proposed team in providing similar services				Maximum 30 points
Team Member Position	Years Of Experience	Of	Highest Qualification	Attach Summarised CV's and certified copies of qualification (not older than 3 months) to Annexure B

ATTACH FUNCTIONALITY CRITERIA RESPONSE

FUNCTIONALITY CRITERIA TO BE COMPLETED AND ATTACHED TO EACH ANNEXURE

ALL SUPPLIERS MUST SUBMIT THEIR RESPONSES IN THE FOLLOWING FORMAT:

ANNEXURE A1 (Capability, Experience and Capacity)

1st POSITIVE REFERENCE LETTER

Experience of firm in providing similar service

Tick box

Document for submission



Evidence of prior experience in providing resource mobilisation services.

Attach Company Profile Listing the number of Projects. (Completed and Current)

ANNEXURE A2 (Capability, Experience and Capacity)

2ND POSITIVE REFERENCE LETTER

Experience of firm in providing similar service

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Tick box

Document for submission



Evidence of prior experience in providing resource mobilisation services.

Attach Company Profile Listing the number of Projects. (Completed and Current)

ANNEXURE A3 (Capability, Experience and Capacity)

3RD POSITIVE REFERENCE LETTER

Experience of firm in providing similar service

Tick box

Document for submission

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Evidence of prior experience in providing resource mobilisation

Attach Company Profile Listing the number of Projects. (Completed and Current)

ANNEXURE B EXPERIENCE IN THE INDUSTRY

Staff Placed on Project

Tick box

Document for submission

List names of staff member(s) who will direct the overall assignment throughout the duration of the engagement as well as those staff members who will be responsible for planning, directing, executing and/or reporting on this engagement.

Include the qualifications and years of experience and detailed resumes of all staff members named and professional membership held. At a minimum, full details should be provided for the following levels:

- Partners/Directors
- Managers
- Supervisors
- Clerks

Describe any staff rotation plans for the service team for the contract period.

**ANNEXURE C
FIDELITY /PROFESSIONAL INDEMNITY**

Tick box

Document for submission



Attach valid proof

ANNEXURE E

PROFESSIONAL MEMBERSHIP

Tick box

Document for submission

Attach valid proof

EVALUATION PROCESS (CONTINUED)

PRICING SCHEDULE

The following requirements with regards to the pricing of the assignment must be adhered to.

- A fixed price per hour must be provided for the entire assignment. UNIVEN will negotiate with the successful bidder a service level agreement that will make provision for an annual CPI adjustment linked to the corresponding period CPI as determined by Statistics South Africa on the anniversary of the contract every year.
- The price should include Value Added Tax. The hours should be distributed between the different levels of staff that will work most efficiently for the service provider.
- All assumptions made in drawing the budget, including all cost factors such as disbursements, subsistence and traveling must be detailed.
- The service provider should include a breakdown of the hourly tariff applicable for any ad hoc projects that may be requested.
- The Service Provider is expected to maintain an adequate level of Fidelity/Professional Indemnity Insurance for the duration of the assignment for services of this nature. The cost of the insurance shall be deemed to have been included in the proposed tender price.
- The service provider shall furnish such additional information that UNIVEN may reasonably require.

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EVALUATION PROCESS (CONTINUED)

Pricing Schedule

Cost of work

The consultant/company/specialist will charge according to commission targets rates agreed upon which will be on a sliding scale for distinct categories as follows:

R1 000 000	-	R 5 000 000	=%
R 5 000 000	-	R 10 000 000	=%
R 10 000 000	-	R 20 000 000	=%
R 20 000 000	-	R 30 000 000	=%
R 30 000 000	-	R 40 000 000	=%
R 40 000 000	-	R 50 000 000	=%
R 50 000 000	-	Above	=%

DETAILS OF PROPOSER

Detail on this page MUST be completed fully. Incomplete forms shall render the offer invalid.

(N/A to be stated if not applicable).

Requirement	Response
Registered name of company/proposer	
CIPRO Registration number	
VAT registration number	
UIF registration number	
Official telephone number	()
Official fax number	()
E-mail Address	
Physical Address	
	Code
Official Postal Address	
	Code
Director / Member	Full Names and Surname

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	Position in company/ proposer											
	ID No.						Income Tax No.					
Director / Member (2)	Full Names and Surname											
	Position in company/ proposer											
	ID No.						Income Tax No.					
Director / Member (3)	Full Names and Surname											
	Position in company/ proposer											
	ID No.						Income Tax No.					

FINANCIAL STATUS

Details of the specific parties utilised by the company/ proposer				
Bank	Name			
	Branch			
Bookkeeper	Full Name			
	Tel no.	()	Alternative Tel no.	
	Fax no.	()	E-mail	
	Address			
Aud	Full Name			

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	Tel no.	()	Alternative Tel no.	
	Fax no.	()	E-mail	
	Address			

Please indicate if you will be willing to provide further details if UNIVEN considers these necessary to evaluate your capacity to offer the service or goods as detailed in this proposal.	Yes	No
---	-----	----

DELIVERY INSTRUCTIONS

ALL SUPPLIERS MUST SUBMIT THEIR RESPONSES IN THE FOLLOWING FORMAT:

Appendix L	SBD 4	Response attached to Appendix M
Appendix M	SBD 8	Response attached to Appendix N

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Appendix N	SBD 9	Response attached to Appendix O
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RFP DOCUMENT REF. NO: VC/01/2022

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Each page of this RFP document must be initialled by a duly authorised representative and the declaration signed in full

Appendix A

Resource Mobilisation Methodology

Tick box

Document for submission

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- Methodology and approach to perform the resource mobilisation assignment. Evidence of understanding the brief and UNIVEN's operations as reflected in aligning the methodology and approach to the environment. Inclusive of a project plan with timelines demonstrating how the work will be completed during the contract period, having due regard for the needs specified in this RFP.

Appendix: B

Capabilities, Capacity and Competitive Advantages

Tick box

Document for submission

- Provide a list of perceived strengths and weaknesses of the firm e.g. similar previous experience, in-house skills etcetera, thus providing information which will assist UNIVEN to assess its capabilities, capacity and competitive advantages etcetera.

Appendix C
Reprimands/ Warning

Tick box **Document for submission**

State whether the service provider is currently under the terms of a public or private reprimand/warning of a Professional Association

Appendix D

Organogram

Tick box

Document for submission



Provide an organogram of the service provider

Appendix E

Approach and Methodology

Tick box

Document for submission



Attach Approach and Methodology

Appendix F

Tax Clearance SARS PIN

Tick box

Document for submission

Please ensure that the Tax clearance certificate is valid and certified if it is not an original copy

Appendix G

BBBEE Certification/If applicable

Tick box

Document for submission

Please supply a valid BBBEE certificate

Appendix H

Annual Financial Statements

Tick box



months, i.e.

Document for submission

Please ensure that the Annual financial statements fall within 12
(most recent not older than 12 months) and that they are certified

Appendix I
Board Resolution (Statement of Proxy)

Tick box

Document for submission



Include Board resolution for delegation of authority.

NB The following proof MUST be produced: Proof that the person who signed the proposal has the authority to do so.

Failure to provide appropriate documentation as outlined above shall render your proposal invalid.

Appendix J

SBD 4: Declaration of Interest

Tick box

Document for submission



Please ensure SBD 4: Declaration fully signed and attached

SBD 4

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, 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, shareholder²):
.....

2.4 Company Registration Number:

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.....
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.

¹“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.

²“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 **YES /**
NO

presently employed by the state?

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:

.....

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Any other particulars:

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

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

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

(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 / **YES / NO** trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:

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

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

2.9.1 If so, furnish particulars.

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

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

2.10.1 If so, furnish particulars.

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

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

2.11.1 If so, furnish particulars:

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

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

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.....

Signature	Date
.....
Position	Name of bidder

Appendix K

SBD 8: Declaration of Bidders Past Supply Chain Practises

<u>Tick box</u>	<u>Document for submission</u>
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Please ensure SBD 8: Declaration of Bidders Past Supply Chain Practises fully signed and attached

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
- 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.**

4.1	<p>Is the bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury’s website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
-----	--	---------------------------------	--------------------------------

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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)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

SBD 8

CERTIFICATION

**I, THE UNDERSIGNED (FULL NAME).....
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS
TRUE AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY
BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.**

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Appendix M

SBD 9: Certificate of Independent Bid Determination

Tick box

Document for submission

Please ensure SBD 9: Certificate of Independent Bid Determination fully signed and attached

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

THE APPOINTMENT OF THE RESOURCE MOBILISATION CONSULTANT

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ 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).² 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:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, which 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;

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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

SBD 9

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 consortium³ 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.

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

SBD 9

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

THE APPOINTMENT OF THE RESOURCE MOBILISATION CONSULTANT

NB: This form must be completed by the company Director or any other person with authority to sign on behalf of the company

Ibeing a bidder to supply services to University of Venda hereby declare that:

- 1) I have not tried to influence any party at Univen with any financial and/or any other interests, either directly or indirectly, in connection with this contract
- 2) No individual or group stand to benefit materially, directly or indirectly, from award of this contract for the duration of this contract
- 3) No approaches of benefits, bribes, backhanders or any other form of unauthorised benefit were either received or made or promised and will not be entertained for the duration of this contract.
- 4) In the event that any approach was or will be made, we undertake that no such approach will be entertained
- 5) Any approach of the above shall be reported immediately to the registrar at 0159628000 or the DVC Operations on 015 962 8105
- 6) Any requests for sponsorships and/or any other approach shall not be entertained and will be reported to these offices immediately.
- 7) We shall only entertain any sponsorship request if it has been made on the official letterhead of Univen and signed by a member of the Executive management of the university or the Director: Communications and Marketing

Our company hereby consent that any breach of the above will be dealt with decisively by the university in terms of its rules and will lead to the immediate termination of the agreement and recovery of costs by the university of Venda.

Signed by:on this theday of20.....

Signature:

Duly authorise the supplier/bidder to sign this declaration

DECLARATION

I, the Undersigned (name):hereby certify that the information furnished above is correct. I accept that the university of Venda through a representative may act against me should this declaration prove to be false

Signature:Date:

ID #:

Position:

Tender Reference #:

SWORN STATEMENT

I/we, the undersigned, who warrant that I/we am/are duly, authorised to do so, on behalf of the enterprise certify that:

1. The information furnished is true and correct
2. If misrepresentation to gain any benefit is established, University of Venda may in addition to any other remedy it may have
 - a. Disqualify me/us (as applicant/s)
 - b. Restrict the applicant, its shareholders and directors from obtaining business from University of Venda for a period not exceeding 5 years
 - c. In the event that a contract has been concluded, recover from the supplier all costs, losses, or damages incurred or sustained as a result of the award of the contract
 - d. Cancel the contract and claim any damages suffered by having to make less favourable arrangements after such cancellation; and
3. Univen is hereby empowered to take such steps as it may require to verify information submitted, including, but not limited to, the use of independent auditors or other experts.
4. If there are any changes to the information supplied on this form, I/we will inform Univen Supply Chain Management unit immediately

Name of Enterprise:

Signature:Position:.....

Business Address:

.....
.....

Office Telephone:Mobile:

Date:

