Knysna Municipality wishes to enter into a contract with a suitably accredited service provider for the presentation of an accredited programme: The programme must be aligned to Unit Standard 110009 at NQF 4 worth 4 credits (Record Keeping and Logistics).

Sealed quotations clearly marked, “B529/2018/19”, can be submitted:
By hand to: Supply Chain Management Section
Knysna Municipality
Clyde Street
Knysna
By fax to: 086 650 1415
By email to: vnobatana@knysna.gov.za

Electronic bid documents must reach the Supply Chain Management Section before the closing time.

SETA Certificate Accreditation must be provided

Price(s) quoted must be firm and must be inclusive of VAT when applicable.
Tax Clearance Certificate or Sufficient Evidence that Tax matters are raised with SARS must be attached.
Price must include all related expenses, i.e. transport, accommodation etc.
Attached KMBD 4 document must be completed.
Status of Municipal accounts must be submitted.
Invoices must be submitted to jcordier@knysnagov.za and will be paid within 30 days of delivering the service.
Only an Official order and appointment letter will bind the Council.
Knysna Municipality wishes to enter into a contract with a suitably accredited service provider for the presentation of an accredited programme: The programme must be aligned to Unit Standard 110009 at NQF 4 worth 4 credits (Record Keeping and Logistics).

REQUIREMENTS:

Point’s allocation for functionality

1. Company history and experience on similar works with references to previous experiences. (15)
2. List of contactable references of similar municipal services previously done. (15)

EVALUATION SCHEDULE

*** (Your pricing schedule will not be considered if proof related to this table is not attached)

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Scoring criteria</th>
<th>Points Claimed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide company profile, history, years of experience. Years of experience must be clearly indicated in the company profile or CV</td>
<td>Years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1 - 2(5)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 - 4(10)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 + (15)</td>
<td></td>
</tr>
<tr>
<td>Provide a list of contactable references of similar municipal services previously provided</td>
<td>1 ref (5)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 refs (10)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 refs or more (15)</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>

Tenderers must achieve a minimum of 20 points in order to qualify for further evaluation on price and preference points
Specification

Record keeping and logistics

1. Background

Knysna Municipality wishes to enter into a contract with a suitably accredited service provider for the presentation of an accredited programme: The programme must be aligned to Unit Standard 110009 at NQF 4 worth 4 credits.

2. Course outline

On completion of the course the learner should be able to:

- Understand and implement a Record and data management system and the relevant process.
- Overview of the guidelines that relate to record and data management
- Understand and implement data storage retrieval aspects
- Understand and implement a Planning and storage and retrieval system
- Implementing and maintaining a filing system
- Understanding Guidelines for retention and disposal of records
- Archiving and disposal of records
- Implement practical tips and templates for use at work
- Practically apply principles to own work environment and related types of data that are worked with
- Implement good administrative practices and processes
- Use technology effectively for data management
- Apply a Quality Management System

3. Attendees

4 Employees from the HR Section

4. Duration

The training must be completed within 2 days

5. Language

Training must be presented in English.
6. **Methodology**

   - Facilitation and Lectures
   - Assignments
   - Self-assessment exercises

7. **SETA Certificate Accreditation**

   A certified copy of the Bidders SETA accreditation Certificate must accompany the bid documents. If the requested certified copy does not accompany the bid documents of the bidder, the municipality reserves the right to reject the bid.

8. **Certification**

   Competency Certification on course completion.

9. **Pricing**

   - A unit rate per trainee should be provided;
   - The rate must be all inclusive (i.e. training material, stationery, all catering requirements, etc.);
   - Rates must be VAT inclusive;
   - The supplier must furnish the Municipality with an original detailed invoice.

10. **Catering**

    The price of catering must include the following:

    - Water and Sweets
    - Morning tea/coffee/Juice with a sandwich
    - Finger lunch with juice/coffee/tea
    - Afternoon tea/coffee/juice
      * consideration must be given to dietary requirements

11. **Other**

    The successful bidder will be required to sign a Service Level Agreement with the Municipality.
## PRICING SUMMARY:

<table>
<thead>
<tr>
<th>QTY</th>
<th>Description</th>
<th>Duration (Working Days)</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 Employees</td>
<td>Record keeping and logistics</td>
<td>2 Days</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Employees</td>
<td>Catering</td>
<td>2 Days</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal

15% VAT

**TOTAL PRICE**

### Contact Details of Tenderer

- Knysna Municipality Supplier number
- CSD Supplier number
- CSD Unique Registration Reference Number
- The name of the Tenderer:
- The name of the contact person:
- The address of the Tenderer:
- Telephone:
- Facsimile:
1. No bid will be accepted from persons in the service of the state.¹

2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.

3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

3.1 Full Name of bidder or his or her representative:

3.2 Identity Number:

3.3 Position occupied in the Company (director, trustee, shareholder²):

3.4 Company Registration Number:

3.5 Tax Reference Number:

3.6 VAT Registration Number:

3.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8 Are you presently in the service of the state?  

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

3.8.1 If yes, furnish particulars:
## 3.9
Have you been in the service of the state for the past twelve months?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

**3.9.1** If yes, furnish particulars:

__________________________________________________________________________

__________________________________________________________________________

## 3.10
Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved the evaluation and or adjudication of this bid?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

**3.10.1** If yes, furnish particulars:

__________________________________________________________________________

__________________________________________________________________________

## 3.11
Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

**3.11.1** If yes, furnish particulars:

__________________________________________________________________________

__________________________________________________________________________

## 3.12
Are any of the company’s directors, trustees, managers, principle shareholders or stakeholders in service of the state?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

**3.12.1** If yes, furnish particulars:

__________________________________________________________________________

__________________________________________________________________________

## 3.13
Are any spouse, child or parent of the company’s directors, trustees, managers, principle shareholders or stakeholders in service of the state?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

**3.13.1** If yes, furnish particulars:

__________________________________________________________________________

__________________________________________________________________________

## 3.14
Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

**3.14.1** If yes, furnish particulars:

__________________________________________________________________________

__________________________________________________________________________

**MSCM Regulations:** “in the service of the state” means to be –

1. Member of –
   - (a) any municipal council;
   - (b) any provincial legislature;
   - (c) the national Assembly or the national Council of provinces;

2. Member of the board of directors of any municipal entity;

3. Official of any municipality or municipal entity;

4. Employee of 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);

5. Member of the accounting authority of any national or provincial public entity;

6. An employee of Parliament or a provincial legislature.

**Shareholder** means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.

### 4.
Full details of directors / trustees/ members / shareholders:

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Identity Number</th>
<th>State Employee Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. I, the undersigned (name) __________________________________________, certify that the information furnished in paragraphs 3 and 4 above is correct.

I accept that the state may act against me should this declaration prove to be false.

<table>
<thead>
<tr>
<th>Name of Bidder</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature</td>
<td>Capacity</td>
</tr>
</tbody>
</table>
NAME OF THE BIDDER: ____________________________________________

FURTHER DETAILS OF THE BIDDER’S; Director / Shareholder / Partners, etc:

<table>
<thead>
<tr>
<th>Director / Shareholder / partner</th>
<th>Physical address of the Business</th>
<th>Municipal Account number(s)</th>
<th>Physical residential address of the Director / shareholder / partner</th>
<th>Municipal Account number(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NB: **Please attach** certified copy (ies) of ID document(s)

I, ______________________________, (Full name in block letters) the undersigned, certify that the information furnished on this declaration form is correct and that I / we have no undisputed commitments for municipal services towards a municipality in respect of which payment is overdue for more than 90 days.

If the value of the transaction is expected to exceed R10 million (VAT included) I certify that the bidder has no undisputed commitments for municipal services towards a Municipality in respect of which payment is overdue for more than 30 days;

**THUS DONE AND SIGNED** for and on behalf of the Bidder, at __________________________, on the ______________ day of ______________________ 20______.

Number of sheets appended by the tenderer to this schedule (If nil, enter NIL) ______________________________________

SIGNATURE: ___________________________ NAME (PRINT): ___________________________

CAPACITY: ___________________________ NAME OF FIRM: ___________________________

For office use (comments): __________________________________________________________