



REQUEST FOR QUOTATION:

RFQ 22775

APPOINTMENT OF A SERVICE PROVIDER / CONSULTANT TO PROVIDE SERVICES OF AN ASSESSOR FOR THE NATIONAL CERTIFICATE IN BANKING AT ITHALA SOC LIMITED

NON-COMPULSORY BRIEFING SESSION MONDAY 22 APRIL 2024 @ 12H00

CLOSING DATE AND TIME: TUESDAY, 30 APRIL 2024 @ 13H00

Quotations to be submitted via email: [Quotes LTD@myithala.co.za](mailto:Quotes_LTD@myithala.co.za)

Procurement Enquiries

Name : S. P. Miya
Telephone : 031 366 2544
Email : spmiya@myithala.co.za

Name of service provider:

TO ATTEND THE ONLINE BRIEFING PLEASE SEND AN EMAIL TO quotes_LTD@myithala.co.za (quotes underscore ltd@ myithala dot co dot za) and write the RFQ number on the body of the email, we will respond with an invitation that will be sent on 19 April 2024.

REQUEST FOR QUOTATIONS

RFQ 22775: APPOINTMENT OF A SERVICE PROVIDER / CONSULTANT TO PROVIDE SERVICES OF AN ASSESSOR FOR THE NATIONAL CERTIFICATE IN BANKING AT ITHALA SOC LIMITED

Competent service providers are hereby invited to furnish written quotations for performing the above-mentioned service / supplying the above-mentioned goods.

The following conditions will apply:

Price(s) quoted must be valid for at least **sixty (60)** days from date of your offer.

Price(s) quoted must be firm.

A firm delivery period must be indicated.

This quotation will be evaluated in terms of the 80/20 preference point system as prescribed in the Preferential Procurement Policy Framework Act (No 5 of 2000) and its Preferential Regulations 2022. For the purpose of this tender a maximum point of 80 will be allocated for price and one of the following specific goals will be acceptable for the claiming of points, i.e. Black women ownership, Black youth ownership or disability ownership. A maximum of 20 points will be allocated for either one of the specific goals to be claimed.

More than 51% owned by Blacks as per the category on Table 1	5
Less than 51% owned by Blacks as per the category on Table 1	2
Zero ownership of the category indicated on Table 1	0
Located in Durban and surroundings	15
Located outside the Ethekwini municipal demarcation	5

The onus is on the service provider to provide documentary proof of the claims in terms of the specific goals, failure to submit proof will result in non-allocation of points, thus regarded as not claiming.

Enclosed is the Integrity Declaration which must be completed in full and signed by the service provider, **failure to complete and sign shall invalidate your quotation.**

A quotation must be submitted with the following **compulsory** documents:

- A copy of valid BBEE certificate or Sworn Affidavit (non-compulsory)
- Central Supplier Database (CSD) summary report
- **Company profile / Curriculum Vitae**
- **Accreditation of the Assessor**
- **Registration of the Assessor with BankSETA**

No awards will be made to person(s)

- Who is not registered on the Central Supplier Database;
- Who is in the service of the state;
- If that person is not a natural person, of which any director, manager, principal shareholder or stakeholder is a person in the service of the state; and/or

Quotation must only be submitted by email Quotes_Ltd@myithala.co.za (quotes underscore at myithala dot co dot za)

NON-COMPULSORY MSTEAMS (ONLINE) BRIEFING SESSION MONDAY 22 APRIL 2024 @ 10H00.

All quotations must be submitted on or before **11:00 on Tuesday, 30 April 2024**. No quotations will be accepted after this date and time.

Ithala SOC reserves the right to withdraw any invitation to quote and/or to re-advertise or to reject any quotation or to accept a part of it. Ithala SOC does not bind itself to accepting the lowest quote or award a contract to the tenderer scoring the highest number of points.

Yours faithfully

SUPPLY CHAIN MANAGEMENT

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	

Terms of Reference for the appointed of an accredited National Certificate in Banking SAQA ID No 61589 Assessor to provide Assessing Services to the Unemployed Learnership Programme (*Quote Requisition No. 22775*)

1. INTRODUCTION/BACKGROUND

- a. Ithala SOC Limited is a wholly owned subsidiary of Ithala Development Finance Corporation.
- b. It is an authorized Financial Services and Credit Provider.
- c. Our purpose is to provide financial services to the people of KwaZulu-Natal, thereby contributing to the province's socio-economic development. Our physical footprint spans the entire province of KwaZulu-Natal and, in some rural areas, we still remain the only financial institution with a physical presence.
- d. As part of Ithala's drive to alleviate the high number of unemployment amongst the youth of South Africa, Ithala has embarked on an Unemployed Banking Learnership programme which aims to assist unemployed matriculants to gain valuable work experience and skills within the Financial & Insurance sector, whilst obtaining a National Certificate in Banking NQF Level 5 qualification.

2. OBJECTIVE

The objective for this order is to appoint and contract an Accredited and Competent Training service provider to provide Assessor Services for the National Certificate in Banking NQF Level 5, SAQA ID No 61589 for 20 learners in the Unemployed Learnership programme. The assessments are conducted manually at the Ithala's Learning Centre in Durban.

3. PURPOSE

The purpose for this learnership programme is to provide unemployed learners with access of obtaining a National Certificate in Banking NQF Level 5 qualification, whilst gaining valuable work experience and skills to

become successful in the Banking & Insurance sectors. The programme will be offered by Ithala SOC Limited, who is an accredited training provider accredited by BANKSETA. Ithala seeks to appoint an experienced, qualified, and accredited Assessor Assessment Partner for the Banking learnership programme.

4. CONTRACT PERIOD

The contract duration will be from the first 4 months consist of the theoretical learning aspect of the 12 months programme, the service provider will provide assessing services and reports during the entire theoretical learning period of the learnership programme and will provide ad hoc assessment services until the close-off of the learnership programme in 2025.

5. SCOPE OF THE SERVICE REQUIRED

The service provider will:

- 5.1 Plan and Prepare for the assessment for twenty (20) learners Manual Portfolio of Evidence (POE) in line with guidelines stipulated in Ithala's Assessor Assessment Guide.
- 5.2 Conduct and Record assessments of twenty (20) learners Manual POE in line with Ithala's Assessor Assessment Guide.
- 5.3 Conduct and Record re-assessment of learner(s) Manual POE, if a learner is deemed Not Yet Competent (NYC) on a module or section.
- 5.4 Provide assessment feedback to all twenty (20) learners in both a positive and constructive manner as stipulated in the Ithala Assessor assessment guide.
- 5.5 Provide reviews and reports of the assessments to Ithala's Learning & Development management team.
- 5.6 Keep records of all learners who were assessed for a period of 5 years after the programme contract has ended with Ithala.
- 5.7 Adhere to Ithala Code of Conduct on conducting assessments, as stipulated in Ithala Assessor assessment guide.
- 5.8 Complete an Ithala Assessor Agreement.
- 5.9 Complete an Ithala Assessor Non-disclosure Agreement.
- 5.10 It is preferable that the Service Provider / Consultant must be based in

Durban and its surrounding areas.

6. BID CONTENT

- a. The profile of the service provider or Curriculum Vitae (CV) of the Consultant
- b. Valid Accreditation Certificate of the Assessor to Assess the National Certificate in Banking qualification, SAQA ID 61589.
- c. The Assessor must be registered as an Assessor with BANKSETA and provide a valid proof of registration.
- d. Costing and estimates for each assessment for the entire programme assessment.

PRICING SCHEDULE

ITEM NO.	DESCRIPTION	QUANTITY	UNIT PRICE	TOTAL
1.				
2.				
3.				
4.				
SUB TOTAL (EXCL. VAT)				R
VAT @15%				R
TOTAL (INCL. VAT)				R

NB: PLEASE SIGN BELOW TO INDICATE UNDERSTANDING AND ACCEPTANCE OF THE TERMS OF REFERENCE ABOVE

NAME OF BIDDER: _____

SIGNATURE OF BIDDER: _____

DATE: _____

A. INTEGRITY DECLARATION

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to quote. 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 tenderer 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 quotation process.

2. Tenderer's declaration

2.1 Is the tenderer, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state?

YES	NO
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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 table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by Ithala SOC (Ltd)?

YES	NO
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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
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¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.3.1 If so, furnish particulars:

3 DECLARATION

I, the undersigned, (name & Surname) _____ in submitting the accompanying quotation, 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 declaration;
- 3.2 I understand that the accompanying quotation will be disqualified if this declaration is found not to be true and complete in every respect;
- 3.3 The tenderer has arrived at the accompanying quotation independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² 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.
- 3.4 The terms of the accompanying quotation have not been, and will not be, disclosed by the tenderer, directly or indirectly, to any competitor, prior to the date and time of the official quotation closing or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the tenderer with any official of Ithala SOC (Ltd) in relation to this procurement process prior to and during the quotation process except to provide clarification on the quotation submitted where so required by the Ithala SOC (Ltd); and the tenderer was not involved in the drafting of the specifications or terms of reference for this quotation.
- 3.5. 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.
- 3.6 The tenderer or any of its directors is / are not listed on the National Treasury's Register of Tender Defaulters or the Database of Restricted Suppliers, have not been convicted by a court of law for fraud and corruption during the past five years, have not had any contract between the bidder and any organ of state being terminated during the past five years on account of failure to perform on or comply with the contract

² 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT ITHALA SOC (LTD) MAY REJECT THIS QUOTATION OR ACT AGAINST ME IN TERMS OF ITS SCM POLICY SHOULD THIS DECLARATION PROVE TO BE FALSE.

Signature

Date

Position

Name of Bidder

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

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

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

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

a) The applicable preference point system for this tender is the **80/20** preference point system.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

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

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “**tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 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 price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

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

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed as per the table in the conditions of tender (Page 2) (To be completed by the tenderer)
Black Ownership	5	
Located in Durban and surroundings	15	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.2. Name of company/firm.....

4.3. Company registration number:

4.4. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.5. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.1, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:
DATE:
ADDRESS: