

**SBD 1: PART A  
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH MARITIME SAFETY AUTHORITY					
<b>RFQ NUMBER:</b>	HO-1754	ISSUE DATE	08 JULY 2026	CLOSING TIME:	11h00
		CLOSING DATE	13 JULY 2026		
DESCRIPTION	Refer to annexure A for detailed specification <b>LEARDESHIP ALIGNMENT WORKSHOP (20 – 22 JULY 2026 IN DURBAN)</b>				
BRIEFING SESSION (If applicable)	N/A				
DELIVERY ADDRESS	DURBAN, KZN (The venue address will be furnished to the successful bidder.)				
VALIDITY PERIOD	Price quoted should remain valid for at least sixty (60) days after the closing date.				
<b>ALL BID RESPONSE DOCUMENTS MUST BE EMAILED TO:</b>					
<b><u><a href="mailto:rfgresponses@samsa.org.za">rfgresponses@samsa.org.za</a></u></b>					
<b>(EMAIL SUBJECT LINE MUST CLEARLY INDICATE THE RFQ NUMBER)</b>					
<b>BIDDING PROCEDURE AND TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>					
CONTACT PERSON	NOMFUNDO MJI				
TELEPHONE NUMBER	012 366 2600				
E-MAIL ADDRESS	<a href="mailto:nmji@samsa.org.za">nmji@samsa.org.za</a>				
<b>SUPPLIER INFORMATION</b>					
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	TAXCOMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA	
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>					
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?

YES  NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?

YES  NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?

YES  NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

YES  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.**

**SBD 1: PART B**  
**TERMS AND CONDITIONS FOR BIDDING**

**1. BID SUBMISSION:**

- 1.1. BIDS MUST BE EMAILED / 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, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER MAY BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7), FOR LONG TERM CONTRACTS / OR WERE DEEMED NECESSARY.
- 1.5. PROSPECTIVE BIDDERS MUST CONSIDER THE SPECIFICATION & ADDITIONAL SUPPORTING DOCUMENTATION WHEN RESPONDING.
- 1.6. ALL INFORMATION SUBMITTED AS EVIDENCE MUST BE CONSISTENT WITH DECLARATIONS MADE TO BE AWARDED POINTS. INCONSISTENT INFORMATION PROVIDED MAY RESULT IN 0 POINTS AWARDED FOR THE APPLICABLE GOAL/S.
- 1.7. SAMSA RESERVES THE RIGHT TO DISQUALIFY BIDDERS WITH SUPPORTING DOCUMENTS THAT ARE NOT DULY SUBMITTED IN TERMS OF THE BID CONDITIONS.
- 1.8. DELIVERY COSTS IN THE QUOTATION WILL NOT BE CONSIDERED SEPARATELY, BUT RATHER AS PART OF THE TOTAL QUOTATION DURING THE EVALUATION.

**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 PIN 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.**

TOTAL BID PRICE (INCLUDING VAT)	
SIGNATURE OF BIDDER	
DATE	

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

**SBD 4: 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<sup>1</sup> 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 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 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 consortium<sup>1</sup> 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.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

\_\_\_\_\_

## SBD 6.1

### 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 bid:
- 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 Either the 90/10 or 80/20 preference point system will be applicable in this bid. The lowest/ highest acceptable bid will be used to determine the accurate system once bids are received.
- 1.3 Points for this bid (even in the case of a bid for income-generating contracts) shall be awarded for:
- (a) Price; and
  - (b) Specific Goals.
- 1.4 The preference point system application must not exceed 100 and must be applied as per below:
- 1.4.1 The 80/20 preference system:

The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS**	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

\*\* Point allocation break down provide below

1.4.1.1 SPECIFIC GOALS: 80/20

SPECIFIC GOAL	Points
<b>Goal 1: Historically Disadvantaged Individuals (14)</b>	
a) who had no franchise in national elections before the 1983 and 1993 Constitutions	7
b) who is a female	5
c) who has a disability	2
<b>Goal 2: who is youth</b>	<b>3</b>
<b>Goal 3: Locality</b>	<b>3</b>
<b>TOTAL</b>	<b>20</b>

1.4.2 The 90/10 preference system:  
The maximum points for this bid are allocated as follows:

	POINTS
<b>PRICE</b>	90
<b>SPECIFIC GOALS**</b>	10
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

\*\* Point allocation break down provide below

1.4.2.1 SPECIFIC GOALS: 90/10

SPECIFIC GOAL	Points
<b>Goal 1: Historically Disadvantaged Individuals (7)</b>	
a) who had no franchise in national elections before the 1983 and 1993 Constitutions	4
b) who is a female	2
c) who has a disability	1
<b>Goal 2: who is youth</b>	<b>1</b>
<b>Goal 3: Locality</b>	<b>2</b>
<b>TOTAL</b>	<b>10</b>

1.5 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 bid, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 SAMSA reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by SAMSA.

**2. DEFINITIONS**

- (a) **“locality”** means the promotion of SMMEs located within the specific area;
- (b) **“bid”** 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 bidding process or any other method envisaged in legislation;
- (c) **“price”** means an amount of money bided for goods or services, and includes all applicable taxes less all

- unconditional discounts;
- (d) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (e) **“bid 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 SAMSA and a third party that produces revenue for SAMSA, 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
- (f) **“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 OR 90/10 PREFERENCE POINT SYSTEMS

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

**80/20 or 90/10**

$$P_s = 80 \left( 1 - \frac{P_t - P}{P} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P}{P} \right)$$

Where

- $P_s$  = Points scored for price of bid under consideration  
 $P_t$  = Price of bid under consideration  
 $P_{min}$  = Price of lowest acceptable bid

#### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

##### 3.2.1. POINTS AWARDED FOR PRICE

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

**80/20 or 90/10**

$$P_s = 80 \left( 1 + \frac{P_t - P}{P} \right) \quad \text{or} \quad P_s = 90 \left( 1 + \frac{P_t - P}{P_{max}} \right)$$

Where

- $P_s$  = Points scored for price of bid under consideration  
 $P_t$  = Price of bid under consideration  
 $P_{max}$  = Price of highest acceptable bid

### 4. POINTS AWARDED FOR SPECIFIC GOALS

The preferential procurement point system applicable for this bid is:

Preferential Point System	Mark
80/20	X
90/10	

- 4.1. Specific goals for the bid and points claimed are indicated per the table below: 80/20 preference system.

4.1.1. EQUITY OWNERSHIP CLAIMED IN TERMS OF PARAGRAPH 1.4

	<b>SPECIFIC GOAL (SUPPORTING DOCUMENTS FOR VERIFICATION)</b>	<b>Maximum points that can be scored</b>	<b>Points being claimed by supplier</b>
HDI	Equity ownership <b>by persons who</b> had no franchise in the national elections. (ID copies of ALL listed owner/s, as per the CSD, CK1 registration document (CIPC), BBBEE certificate)	7	
	Equity ownership <b>by women</b> (ID copies of ALL listed owner/s, BBBEE certificate)	5	
	Equity ownership <b>by disabled persons</b> (Medical certificate/ Assessment)	2	
	Equity ownership <b>by youth</b> (ID copies of ALL listed owner/s, BBBEE certificate)	3	
	Locality (CIPC / SARS or valid proof of address utility bill, bank statement, account statement, municipal councillor's letter)	3	
	<b>TOTAL</b>	<b>20</b>	

\*\* Claimed points can only be allocated where supporting documents have been provided.

\*\* Ownership points will be awarded on a pro-rata using share certificates / CSD / SBD

\*\* Specific goal points are allocated to natural persons and will be awarded in accordance with company/ consortium or joint venture ownership allocation

\*\* Locality goal points will only be awarded to suppliers within the province of delivery

\*\* Refer to checklist attached to ensure correct document submission

4.2. Specific goals for the bid and points claimed are indicated per the table below: 90/10 preference system.

4.2.1. EQUITY OWNERSHIP CLAIMED IN TERMS OF PARAGRAPH 1.4

	<b>SPECIFIC GOAL (SUPPORTING DOCUMENTS FOR VERIFICATION)</b>	<b>Maximum points that can be scored</b>	<b>Points being claimed by supplier</b>
HDI	Equity ownership <b>by persons who</b> had no franchise in the national elections. (ID copies of ALL listed owner/s, as per the CSD, CK1 registration document (CIPC), BBBEE certificate)	4	
	Equity ownership <b>by women</b> (ID copies of ALL listed owner/s, BBBEE certificate)	2	
	Equity ownership <b>by disabled persons</b> (Medical certificate/ Assessment)	1	
	Equity ownership <b>by youth</b> (ID copies of ALL listed owner/s, BBBEE certificate)	1	
	Locality (CIPC / SARS or valid proof of address utility bill, bank statement, account statement, municipal councillor's letter)	2	
	<b>TOTAL</b>	<b>10</b>	

\*\* Claimed points can only be allocated where supporting documents have been provided.

\*\* Ownership points will be awarded on a pro-rata using share certificates / CSD / SBD

\*\* Specific goal points are allocated to natural persons and will be awarded in accordance with company/ consortium or joint venture ownership allocation

\*\* Locality goal points will only be awarded to suppliers within the province of delivery

\*\* Refer to checklist attached to ensure correct document submission

**5. SUBMISSIONS BY CONSORTIUMS AND JOINT VENTURES**

5.1. If a submission is a consortium or joint venture, the points claimed for ownership must be detailed separately, as per annexure A and sent back with the bidding documents. The information will define the following:

The percentage (%) of the contract allocated to each JV member or consortium member. This should also be included in an agreement to be made available on request by SAMSA.

The percentage ownership of each JV member or consortium member in each of the specific goals relevant to this bid, with supporting documents.

The total points claimed will be the sum of the percentage contract allocation for each partner multiplied by the percentage weighting for each category, multiplied by the percentage ownership in the relevant specific goal.

**6. DECLARATION WITH REGARD TO COMPANY/FIRM**

- 6.1. Name of company/firm.....
- 6.2. Company registration number: .....
- 6.3. Company/ firm physical address (for claiming locality points):

.....  
.....

TYPE OF COMPANY/ FIRM [Tick applicable box]

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

6.4. DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....  
.....

6.5. TOTAL NUMBER OF YEARS THE COMPANY/ FIRM HAS BEEN IN BUSINESS? .....

6.6. List of shareholder/s information to be used to calculate the points claimed in paragraph 4.3.

NAME	ID NUMBER	HDI** (**Yes / No)			Youth** (**Yes/ No)	% of company / firm owned
		No franchise prior to elections	Women	Disabled		

6.7. 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 bid, 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 4.1 and 5.6, the contractor may be required to furnish documentary proof to the satisfaction of SAMSA 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, SAMSA 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 TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

.....

.....

.....

.....



## ANNEXURE A: SPECIFICATION / DESCRIPTION OF GOODS

DETAIL	INFORMATION
BIDDING & TECHNICAL ENQUIRIES MAY BE DIRECTED TO THE SCM CONTACT PERSON	SCM CONTACT PERSON Name: Contact number: 012 366 2600 Email address:
SHORT DESCRIPTION OF SERVICES / GOODS REQUIRED	<b>LEARDESHIP ALIGNMENT WORKSHOP (20 – 22 JULY 2026 IN DURBAN)</b>
SERVICE / GOODS DELIVERY ADDRESS	DURBAN, KZN (VENUE INFORMATION TO BE FURNISHED TO SUCESSFUL BIDDER)

DESCRIPTION OF SERVICES / GOODS REQUIRED:

### **Leadership Alignment & Organizational Effectiveness Workshop Facilitation**

**(20, 21, 22 JULY 2026 - Durban, KZN)**

#### **1. Background**

- 1.1 Following extensive organizational roadshows conducted by the Chief Executive Officer in May and the Board alongside the Executive Committee (EXCO) in June, several operational and systemic challenges were identified across regional offices.
- 1.2 A critical observation from these engagements was the absence of collaboration and teamwork within leadership at various levels. This was informed by the observed posture of presenting challenges without offering solutions. To address this accountability gap, the CEO has mandated a high-level leadership workshop to take place on 20, 21, 22 July 2026 in KZN Province (Durban) for a total of 44 people.
- 1.3 This session will bring together EXCO (+-11 people), Senior Managers and Principal Officers (+-33) to shift the organizational culture from problem-identification to collaborative problem-solving, establish a unified leadership front and drive organizational effectiveness.
- 1.4 The sessions will be conducted over a period of three (3) days. Day one will be dedicated to EXCO, while the remaining two (2) days will be allocated to EXCO (+-11), Senior Managers and Principal Officers (+-33).

## 2. **Workshop Objectives**

2.1 The appointed facilitator will be required to design, manage and execute a high-impact workshop in **Durban** designed to:

2.1.1 **Facilitate Engagements on Leadership's Role in Organizational Effectiveness:** Clearly define and build a common understanding of the leadership team's collective and individual roles in driving the organization's mandate.

2.1.2 **Facilitate Strategic Discussions on Organizational Performance:** Unpack the current status of organizational performance, identifying root causes of bottlenecks..

2.1.3 **Establish a Foundation for Effective Leadership Teams:** Build shared goals, corporate values, clear behavioural expectations, and robust leadership team cohesion, breaking down silos between Head Office (EXCO) and Regional Operations.

2.1.4 **Drive Solution-Oriented Accountability:** Shift the mindset of Leadership to active ownership and solution generation.

## 3. **Scope of Work and Deliverables**

3.1 The successful service provider will be expected to deliver scope over the following phases:

### 3.1.1 **Phase 1: Pre-Workshop Diagnostic & Design**

3.1.1.1 Conduct brief preliminary consultations.

3.1.1.2 Design a customized, interactive and psychologically safe workshop methodology and agenda.

3.1.1.3 Develop all workshop materials, toolkits, and exercises.

### 3.1.2 **Phase 2: Facilitation (Durban)**

3.1.2.1 Lead the multi-day workshop ( 3 days) using advanced facilitation techniques that encourage candid debate, constructive discussions and consensus-building.

3.1.2.2 Manage group dynamics carefully to ensure balanced participation between executive and regional leadership.

3.1.2.3 Guide the formulation of a **Leadership Charter** (covering values, behaviours, and expectations) and a concrete **Action Plan** for solving the identified challenges.

3.1.2.4 Formulate an Organisational Balance Score Card to ensure role alignment to organisational performance.

3.1.2.5

### **3.1.3 Phase 3: Post-Workshop Reporting**

3.1.3.1 Conduct feedback sessions with select EXCO members, Regional Managers and POs for a further understanding underlying cultural dynamics while assessing impact.

3.1.3.2 Deliver a comprehensive Workshop Outcomes Report within 14 days of completion.

3.1.3.3 The report must document the agreed-upon shared goals, the Leadership Charter including accountability matrices. for and recommendations for sustaining leadership cohesion.

## **4. Required Expertise, Qualifications, and Experience**

4.1 The facilitator(s) must possess a sophisticated blend of strategic acumen, psychological safety expertise and public sector context.

### **4.1.1 Minimum Qualifications**

4.1.1.1 A master's degree (NQF Level 9 or higher) in Business Administration (MBA/MBL), Organizational Psychology, Human Resources, Public Administration, or a closely related field.

4.1.1.2 Professional certification in Facilitation, Executive Coaching, or Change Management (e.g., International Association of Facilitators (IAF), Prosci, or Coach-matching credentials) .

### **4.1.2 Required Experience**

4.1.2.1 **Minimum of 10 years' experience** in executive facilitation, strategic alignment and organizational culture transformation.

4.1.2.2 Proven track record of facilitating workshops for **EXCO** within the South African public sector or state-owned entities (SOEs), demonstrating a strong grasp of public governance environments.

4.1.2.3 Demonstrated experience in conflict resolution, navigating corporate matrix structures (Head Office vs. Regions), and driving behavioral change.

## 5. Evaluation Criteria

### 5.1. Mandatory Requirement

Failure to meet any of the below mandatory requirements will result in the bidder being disqualified from further evaluation.

Mandatory details	Substantiating evidence of compliance (used to evaluate bid)
<b>Qualification of Facilitator</b>	<p>Lead Facilitator must be in possession of a master's degree (NQF Level 9 or higher) in Business Administration (MBA/MBL), Organizational Psychology, Human Resources Management, Public Administration, or a closely related field from a recognized institution.</p> <p><b>Proof required:</b> Copies of relevant academic qualification/s</p>
<b>Experience of Facilitator</b>	<p>The Lead Facilitator must have no less than 10 years of experience in leadership and Management development.</p> <p><b>Proof required:</b> A detailed curriculum vitae (CV) of the proposed Lead Facilitator/Consultant showing the relevant number of years.</p>
<b>Professional certification</b>	<p>Lead Facilitator must be in possession of a valid professional certification in either one of the following Facilitation, Executive Coaching, Leadership Development, Organizational Development, Change Management from a recognized professional body or institution (e.g., International Association of Facilitators (IAF), Prosci, International Coaching Federation (ICF), COMENSA, or equivalent).</p> <p><b>Proof required:</b> Copies of relevant professional certification/s</p>
<b>Company Experience</b>	<p>The bidder must submit a short company profile summarising relevant experience, reflecting a minimum of ten (10) years' experience in facilitating leadership alignment, organisational effectiveness, change management, or strategic workshops.</p> <p>The bidder must also submit three (3) client reference letters for similar assignments successfully completed within the last five (5) years for corporate and/or public sector clients.</p> <p><b>Proof Required:</b></p> <ul style="list-style-type: none"> <li>• A short company profile demonstrating a minimum of ten (10) years' relevant experience; and</li> </ul>

	<ul style="list-style-type: none"> <li>• Three (3) reference letters on the client's official letterhead, signed and dated, clearly indicating the nature and scope of services rendered, and contact details of the client representative.</li> </ul>
<p><b>Methodology</b></p>	<p>SAMSA requires the service provider to submit a detailed and structured methodology demonstrating how the proposed sessions will be designed, delivered, and facilitated to address the workshop objectives. This must include the below deliverables:</p> <p>pre-workshop diagnostic,  facilitation of the three-day workshop  and post-workshop reporting.</p> <p><b>Proof required:</b> A detailed methodology outlining the proposed approach to the pre-workshop diagnostic, facilitation of the three-day workshop, and post-workshop reporting, including key activities, deliverables, facilitation.</p>

SAMSA reserves the right to verify any information submitted. Bidders must clearly label all supporting documents to facilitate ease of reference during the evaluation process.

**ANNEXURE B: PRICING TABLE**

**(THE TOTAL PRICE MUST BE INCLUSIVE OF VAT)**

Name of bidder..... RFQ NUMBER: ...HO 1754.....  DESCRIPTION OF GOODS OR SERVICES: <b>LEARDESHIP ALIGNMENT WORKSHOP (20 – 22 JULY 2026 IN DURBAN)</b> .....
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**Pricing table**

<b>No</b>	<b>Description</b>	<b>Quantity</b>	<b>Cost (excl. VAT)</b>	<b>Cost (incl. VAT)</b>
1	Phase 1: Pre-Workshop Diagnostic and Design	1		
2	Phase 2: Facilitation of Leadership Alignment & Organisational Effectiveness Workshop (3 Days)	1		
3	Development of Leadership Charter, Action Plan, Accountability Matrix , and Organisational Balanced Scorecard	1		
4	Phase 3: Post-Workshop Reporting and Recommendations	1		
5	Travel and Accommodation (if applicable)	1		
6	<b>TOTAL INCL. VAT</b>			

\*\* The bidder must also submit a quotation on their company letterhead.

## REQUIRED SUPPORTING DOCUMENTS & CHECKLIST

No.	Document description	Submitted (Yes / No)
1	Quotation	
2	Signed SBD (RFQ) Forms	
3	Recent CSD, not older than 3 months	
4	Tax pin certificate	
5	Valid B-BBEE	
6	CK1 registration document (CIPC)	
7	ID copies of ALL listed owner/s as per CSD report	
8	Proof of address not older than 3 months	
9	Medical certificate/ Assessment (if applicable)	
10	Consortiums and Joint Ventures Form (if applicable)	

**\*\*ALL INFORMATION SUBMITTED WILL BE TREATED AS EVIDENCE FOR AWARDED POINTS FOR THE SAMSA GOALS AND MUST BE CONSISTENT WITH DECLARATIONS MADE. INCONSISTENT INFORMATION PROVIDED MAY RESULT IN 0 POINTS AWARDED FOR THE APPLICABLE GOAL. SAMSA RESERVES THE RIGHT TO DISQUALIFY BIDDERS WITH SUPPORTING DOCUMENTS THAT ARE NOT DULY SUBMITTED IN TERMS OF THE BID CONDITIONS.**

## GUIDELINES FOR DOCUMENTS REQUIRED FOR THE VERIFICATION OF THE SAMSA GOALS

SPECIFIC GOAL	DOCUMENTS THAT WILL BE USED TO VERIFY THE INFORMATION SUPPLIED
Equity ownership <b>by persons who</b> had no franchise in the national elections  <i>Points for persons or categories of persons historically disadvantaged on the basis of race (black people)</i>	ID copies of all listed owner/s as per CSD report  CK1 registration document (CIPC)  BBBEE certificate
Equity ownership <b>by women</b>  <i>Points for persons or categories of persons historically disadvantaged on the basis of gender (women)</i>	ID copies of all listed owner/s as per CSD report  BBBEE certificate
Equity ownership <b>by disabled persons</b>  <i>Points for persons or categories of persons historically disadvantaged on the basis of disability (persons living with disabilities).</i>	Medical certificate/ Assessment
Equity ownership <b>by youth</b>	ID copies of all listed owner/s as per CSD report
Locality	Address listed on the company registration CIPC / SARS document is acceptable for claiming locality points.  Should you want to claim locality points, for an address not listed on the CIPC / SARS document, that address must be listed on the CSD, accompanied by a valid proof of residence, reflecting one of the listed owners' names and physical address. e.g. Utility bill, bank/ account statement, Municipal councillor's letter.

**ANNEXURE C: Only if selected Partnership/Joint Venture / Consortium”**  
 6.4 (TYPE OF COMPANY/ FIRM)

**APPLICABLE FOR CONSORTIUMS AND JOINT VENTURES (JV)**

**CONSORTIUMS AND JOINT VENTURES OWNERSHIP FORM**

(This form is only applicable for consortiums & JVs only)

- a) The percentage (%) of the contract allocated to each JV member or consortium member. This should also be included in an agreement to be made available on request by SAMSA, should a need arise.

NO	JV or consortium company name	PERCENTAGE FOR EACH MEMBER
1		
2		
3		
	TOTAL	100%

\*\* Additional lines can be added for more

- b) The percentage ownership of each JV member or consortium member in each of the specific goals relevant to this bid, with supporting documents. The total points claimed will be the sum of the percentage contract allocation for each partner multiplied by the percentage weighting for each category, multiplied by the percentage ownership in the relevant specific goal.

**JV or consortium: 1**

NAME	ID NUMBER	HDI** (**Yes / No)			Youth** (**Yes/ No)	% of company / firm owned
		No franchise prior to elections	Women	Disabled		

**JV or consortium: 2**

NAME	ID NUMBER	HDI** (**Yes / No)			Youth** (**Yes/ No)	% of company / firm owned
		No franchise prior to elections	Women	Disabled		

\*\* Additional lines / tables may be added if necessary