SEFAKO MAKGATHO
HEALTH SCIENCES UNIVERSITY

SEFAKO MAKGATHO HEALTH SCIENCES UNIVERSITY

REQUEST FOR QUOTATION

APPOINTMENT OF A QUALIFIED ACTUARIAL SERVICE PROVIDER FOR 3 YEAR PERIOD (2027-2029), TO CONDUCT THE UNIVERSITY'S POST EMPLOYMENT MEDICAL VALUATION IN ACCORDANCE WITH IAS 19

RFQ NO: RE: F/001/2026

REQUEST FOR QUOTATION

RFQ NUMBER	RE: F/001/2026
CLOSING:	DATE: 03 December 2026 TIME: 10:00
DESCRIPTION	Appointment of a qualified service provider for three-year period (2027-2029), to conduct the university's post-employment medical valuation in accordance with IAS 19

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1. INVITATION TO REQUEST FOR QUOTATION

1.1 **RFQ VALIDITY:** 90 days from the date of closure of this RFQ.

1.2 **RFQ DOCUMENTS MUST BE PLACED IN THE BID BOX AT THE ADDRESS INDICATED BELOW:** Bidders should ensure that bids are delivered timeously to the correct address. If the frq document is late, it will not be accepted for consideration.

1.3 **ANY ENQUIRIES REGARDING THE BID PROCEDURE MAY BE DIRECTED TO:**

Department: Supply Chain Management Contact Person: Ms. Rolivhuwa Tshanda

E-mail address: *rolivhuwa.tshanda@smu.ac.za*

ANY TECHNICAL ENQUIRIES RELATING TO THIS BID, MAY BE DIRECTED TO:

Department: Human Resources Department
Contact Person: Ms. Grace Chaane
E-mail address: *grace.chaane@smu.ac.za*

2. DEFINITION OF TERMS

2.1 **"All applicable taxes"** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

2.2 **"B-BBEE"** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;

2.3 "**B-BBEE status level of contributor"** means enterprises whose B-BBEE score, in terms of a sector scorecard which has been issued as a sector code of good practice or in terms of the DTI's Generic Scorecard, has been verified by an accredited B-BBEE verification agency or in the case of Exempt Micro Enterprises or Qualifying Small Enterprise that are at least 51% Black Owned, produced an affidavit verifying their status;

2.4 **"RFQ"** means a written request for quotation in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bid processes or proposals;

2.5 **"BID rigging (or collusive bidding)"** occurs when businesses, that 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 bid process. Bid rigging is, therefore, an agreement between competitors not to compete**.**

2.6 **"Broad-Based Black Economic Empowerment Act"** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

2.7 **"Comparative price"** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;

2.8 **"Contract"** means the agreement that results from the acceptance of a bid by an organ of state;

2.9 **"EME"** means any enterprise with annual total revenue of R10 million or less.

2.10 **"Firm price"** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or resignation, is binding on the demonstrably has an influence on the price of any supplier, or the rendering costs of any service, for the execution of the contract;

2.11 **"Functionality"** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;

2.12 **"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.

2.13 **"Non-firm prices"** means all prices other than "firm" prices;

2.14 **"Person"** includes a juristic person;

2.15 **"Rand value"** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;

2.16 **"Sub-contract"** means the primary contractor's assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;

2.17 **"Total revenue"** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 9 February 2007;

2.18 **"Trust"** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and

2.19 **"Trustee"** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

2.20 **"PURCO SA"** means Purchasing Consortium Southern Africa

3. GENERAL CONDITIONS OF THE RFQ

3.1 Bid submissions must be delivered to the correct address location, which is indicated in the rfq document, which must be delivered timeously as late bid submissions will **NOT** be accepted for consideration.

3.2 Late submissions will not be accepted. A submission will be considered late if it arrives only a second after **10:00** or any time thereafter. The bid shall be closed at exactly **10:00** and bids arriving late **will not** be accepted under any circumstances. Bidders are therefore strongly advised to ensure that their bids be dispatched, allowing enough time for any unforeseen events that may delay the delivery of the bid.

3.3 **The rfq including the returnable address must be submitted in a sealed envelope in the Bid Box, Clinical Pathology Building, Fifth Floor, marked with:**

3.3.1 RFQ Number: RE: F/001/2026

3.3.2 Closing Date and Time: 03 December at 10H00

3.3.3 The Name and Address of the Bidder.

3.3.4 Submit two (2) copies of the bid document. One (1) Original and One (1) Copy.

3.3.5 Submit a memory stick / USB with your bid and pricing in electronic format.

PLEASE NOTE: The bid is subject to the Sefako Makgatho Health Sciences University Procurement Policy, the Preferential Procurement Policy Framework Act, the Higher Education Act of 1997 and, if applicable, any other special conditions of contract.

3.4 The successful bidder will be required to sign a written contract or agreement with the University.

3.5 It is an absolute condition of the bid that the taxes of the bidder **to be in order**, or that proof is submitted that suitable and satisfying arrangements have been made with the South African Receiver of Revenue (SARS).

3.6 A **Valid, Tax Compliance Status Certificate / proof of tax compliance must be submitted** with the bid proposal on or before the closing date and time of the bid. Failure to submit will invalidate the bid.

3.7 Failure to submit a valid B-BBEE Certificate will result in zero preference points being awarded for B-BBEE.

3.8 Rfq forms contained within the rfq document requesting information have been drawn up so that certain essential information is to be furnished in a specific manner and format. Any additional particulars should be furnished on this document where appropriate, or in a separate Annexure.

3.9 Should the bidder desire to make any departures from, or modifications to this bid or to qualify its proposal in any way, it shall clearly set out its bid departure/modification as an Annexure, or alternatively state them in a covering letter attached to the bid proposal referred to herein, failing which, the bid shall be deemed to be unqualified unless it

conforms **exactly** with the requirements of this bid. Unless otherwise specified and stipulated in writing, any part of the Bidder's bid, which deviates from any terms and conditions stated within the rfq document, shall be of no force or effect.

3.10 This rfq document, together with associated forms and annexures, may NOT be retyped or redrafted, but photocopies or reprints may be prepared and used.

3.11 This rfq document, together with associated forms and annexures, may NOT be filled in by means of mechanical devices. A black ink pen should be used to fill in this bid document.

3.12 Bidder shall check the numbers of the pages and satisfy themselves that none are missing or duplicated. No liability shall be accepted in regard to claims arising from the fact that pages are missing or duplicated.

3.13 The rfq price/ bid shall be open for **acceptance for a period of at least 90 days after the closing date of the bid and the bid price quoted must be fixed for a period of 1 year after the bid has been awarded.** It should be noted that Bidders may bid a shorter validity period, but their bid may in that event, be disregarded for this reason. Bidders shall clearly state the period of validity of their rfq.

3.14 All prices shall be quoted in South African currency; **all prices quoted must include VAT (where applicable)**.

3.15 Sefako Makgatho Health Sciences University reserves the right to only accept part of the submitted bid by a service provider or reserve the right not to accept lowest bid or any other bid

3.16 Sefako Makgatho Health Sciences University reserves the right to withdraw or cancel this rfq.

3.17 Unless specifically provided for in the rfq document, no rfqs will be considered if submitted or transmitted by telegram, telex, facsimile, e-mail or similar apparatus.

3.18 It should be noted that Sefako Makgatho Health Sciences University reserves the right to accept or reject any bid proposal without being obliged to give any reasons in this respect.

3.19 Unsuccessful service providers will **not be notified** whether their bid/bid was accepted or not, but will be advised of the outcome if telephonically requested.

3.20 The service provider's **company letterhead** must be used in the bid's cover letter and reflect **the company's name, address and contact details.**

3.21 The correct Rfq Reference Number (See the front page of this bid for the Rfq Number) **and service provider's company name must appear on all pages of the proposal**.

3.22 All pages of the proposal must be **initialed** by the person responsible.

3.23 These conditions form part of the bid general conditions and failure to comply therewith will invalidate your bid.

4. SERVICE PROVIDER DETAILS

Registered Name of the Company:		
Trading Name of the Company:		
Company / Close Corporation registration Number:	VAT Registration Number:	Income Tax Reference Number:
Telephone Number:	Fax Number:	
Web Address:	E-mail Address:	
Name of Contact Person:	Contact Numbers Cell:	
Business Physical Address:	Postal Address:	
Web Address:	E-mail Address:	
TYPE OF FIRM (Please tick the relevant box or boxes)		
□ Public Company (Ltd)		
□ Private Company (Pty) Ltd		
□ Closed Corporation (CC)		
□ Sole Proprietor		
□ Partnership		
□ Other, (Specify)		
PARTICIPATION CAPACITY (Please tick the relevant box or boxes)		

□	Director

□	Partner
□	Associate
□	Senior Associate
□	Junior Associate
□	Owner

BUSINESS SECTOR (Please tick the relevant box or boxes)	
□	Agriculture
□	Accounting services
□	Manufacturing
□	Electricity, Gas and Water
□	Construction
□	Auditing
□	Consulting
□	Professional services
□	Retail and Motor trade
□	Wholesale trade, commercial and other trade
□	Catering, accommodation and other
□	Transport, storage and other trade
□	Communications
□	Finance and Business Services
□	Repair/Allied Services
□	Commercial Agents
□	Community and Social Services
□	Personal Services
□	Other, (Specify)

SMALL, MEDIUM, MICRO ENTERPRISE (SMME) STATUS (Please the relevant box)	
□	Micro
□	Very Small
□	Small
□	Medium
□	Large

TOTAL NUMBER OF EMPLOYEES (Please the relevant box and state the number)		
□	Full Time	Number:
□	Part Time	Number:

LIST ALL PARTNERS, PROPRIETORS & SHAREHOLDERS AS INDICATED BELOW

NAME AND SURNAME	IDENTITY NUMBER	CITIZENSHIP	DATE OF OWNERSHIP	% OF OWNERSHIP	SPECIFY STATUS IF HDI, WOMEN, OR DISABLED	% VOTING

LIST AND IDENTIFY ANY OWNER OR MANAGEMENT OFFICE BEARER WHO HAS AN OWNERSHIP INTEREST IN ANOTHER FIRM

NAME AND SURNAME	IDENTITY NUMBER	CITIZENSHIP	DATE OF OWNERSHIP	% OF OWNERSHIP	SPECIFY STATUS IF HDI, WOMEN OR DISABLED	% VOTING

IDENTIFY ANY OWNER OR MANAGEMENT OFFICER WHO IS AN EMPLOYEE OR HAS DUTIES IN ANOTHER BUSINESS ENTERPRISE

NAME AND SURNAME	IDENTITY NUMBER	CITIZENSHIP	DATE OF OCCUPATION	DESIGNATION	SPECIFY STATUS IF HDI, WOMEN OR DISABLED	% TIME DEVOTED

LIST THE MAJOR ITEMS OF PROPERTIES, LAND, EQUIPMENT, PLANT AND VEHICLES OWNED BY THE FIRM

ITEM DESCRIPTION	QUANTITY	ESTIMATED VALUE

INDICATE BY NAME AND STATUS, THOSE INDIVIDUALS IN THE FIRM (INCLUDING OWNERS AND NON-OWNERS) RESPONSIBLE FOR THE DAY TO DAY MANAGEMENT AND BUSINESS DECISIONS				
ACTIVITY	**NAME AND SURNAME**	**RACE**	**GENDER (MALE/ FEMALE)**	**DISABLED (YES/ NO)**

CLIENT DETAILS WHERE SIMILAR PROJECTS TO THIS BID HAVE BEEN UNDERTAKEN, ATTACH PROOF	
Company/ Institution Name	
Address	
Contact Person	Telephone:
Value of contract	R Date:
Description of Work	
Company/ Institution Name	
Address	

Contact Person	Telephone:
Value of contract	R Date:
Description of Work	

Company/ Institution Name			
Address			
Contact Person	Telephone:		
Value of contract	R	Date:	
Description of Work			
Company/ Institution Name			
Address			
Contact Person	Telephone:		
Value of contract	R	Date:	
Description of Work			
LIST YOUR CURRENT MAIN CLIENTS BELOW			
Client			
Rand Value P.A.	R	% Turnover	
Contact Person		Telephone	
Client			
Rand Value P.A.	R	% Turnover	
Contact Person		Telephone	

Client			
Rand Value P.A.	R	% Turnover	
Contact Person		Telephone	

Client			
Rand Value P.A.	R	% Turnover	
Contact Person		Telephone	

GENERAL

i. Did the firm exist under a previous name? YES/ NO

If **YES**, what was its previous name?

ii. Does your company/any of its employees have a vested interest in Sefako Makgatho Health Sciences University? If **YES**, state which Department / Unit within **Sefako Makgatho Health Sciences University** the said employee(s) have such vested interest

iii. Indicate as to whether any of the Partners, Proprietors & Shareholders is in the service of **Sefako Makgatho Health Sciences University,** or has been in the service of **Sefako Makgatho Health Sciences University** in the previous twelve months?

iv. At what % of full capacity is your firm / company currently operating?

v. What percentage of work, directly/indirectly, is for **Sefako Makgatho Health Sciences**

University?
vi. What was your firm's / company's average turnover (excluding VAT) during the previous three financial years?

vii. Has your firm / company previously been on an approved supplier list with **Sefako Makgatho Health Sciences University**? If **YES**, specify
viii. Does your company have an after-hours service policy? (If **YES**, specify)

5. BANKING DETAILS

I/We hereby request and authorize you to pay any amount which accrue to me/us to the credit of my/our bank account with the below-mentioned bank. I/we understand that the credit transfer hereby authorized will be processed by computer through a system known as Electronic Funds Transfer and I/we also understand that no additional advice of payment will be provided by my/our bank, but details of each payment will be printed on my/our bank statement or any accompanying voucher. (This does not apply where it is not customary for banks to issue bank statements.) I/we understand that payment will be applied by Sefako Makgatho Health Sciences University in a normal way, and that it will indicate the date on which funds will be available in my/our account.

Bank Account Name: _____

Name of Bank: _____

Branch Name & Code: _____

Account Number: _____

Type of Account: Cheque Savings Transmission

Bank details to be certified as correct by DATE STAMP of BANK /PROOF OF BANK DETAILS WITH THE BANK STAMP

Name and Surname: _____ **DATE STAMP OF BANK**

Signature: _____

Designation: _____

Tel number: _____

Fax number: _____

6. TAX COMPLIANCE STATUS REQUIREMENTS

6.1 It is a rfq condition that the taxes of the Bidder must be in order, or that satisfactory arrangements have been made with the South African Revenue Services (SARS) to meet the bidder tax obligations.

6.2 In order to meet this requirement, Bidders are required to obtain from SARS and complete in full the "Application for a Tax Compliance Status Certificate" and submit it to any SARS branch office nationally.

6.3 The original, valid Tax Compliance Status Certificate / proof of tax compliance must be submitted together with the bid/ bid proposal. Failure to submit the original, valid Tax Compliance Status Certificate / proof of tax compliance will result in the bid/ bid proposal being invalidated. **Certified copies of the Tax Compliance Status Certificate will not be accepted**.

7. PREFERENCE POINTS CLAIM

The preference point system will be applied in the adjudication of all qualifying bid.

NB: BIDDER SHOULD STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIONS IN RESPECT OF THE PREFERENCE POINT SYSTEM APPLICABLE TO B-BBEE AND PRICE.

7.1 RFQ EVALUATION POINTS

7.1.1 The following formula will be used to calculate the total points awarded TP =Price+ Functionality +B-BBEE
Where, TP = Total points scored

7.1.2 **Functionality Points:** The Bid Specifications Committee have set minimum **75** points on functionality requirements to be met by Bidder before their bid qualify for price and BBBEE evaluation. Functionality requirements will include technical capacity to deliver, expertise, knowledge and understanding of the service to be provided, relevant track record in the industry and other such requirements.

7.1.2.1 In this instance, the Bid Specifications Committee have decided and stipulated the functionality requirement of 75 points will be required before the price and BBBEE evaluation and before awarding of the bids.

7.1.2.2 The total points awarded for price will not exceed **80.**

7.2 SCORING METRICS

In summary the scoring matrix is as follows:

Functionality	**100 Points**
Price	**80 Points**
B-BBEE	**20 Points**

- The bidder obtaining the highest number of points will be awarded the rfq.
- Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts.
- Points scored will be rounded off to two decimal places.
- In the event that two or more bids have scored equal total points or provides same bid, the successful bid must be the one scoring the highest number of preference points for B-BBEE, in the event the B-BBEE points are equal, the bidder scoring the highest points on functionality will be the preferred bidder.
- Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.
- A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status certificate.
- A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- The SMU may request additional information, clarification or verification in respect of any information contained in or omitted from a bidder submission. This information will be requested in writing;

- ❖ The SMU may conduct a due diligence on any bidder, which may include interviewing customer references or other activities to verify a bidder track record or other information and capabilities(Including visiting the bidder various premises and/or sites to verify certain stated information or assumptions) and in this instances the bidder will be obliged to provide the SMU with all necessary access, assistance and/or information which the SMU may reasonably request and to respond within the given time frame set by the SMU.
- ❖ The SMU may enforce whatever measures it considers necessary to ensure the confidentiality and integrity of the contents of the proposal;
- ❖ The SMU may call shortlisted bidders for presentations and interviewing of the projects managers;
- ❖ The SMU reserves the right to withdraw, accept or rejects any bid below the reserved property price from the bidders.

8. PRICE DECLARATION BY THE BIDDER

I/ We have examined the information provided in your bid document and bid to undertake the work prescribed in accordance with the requirements as set out in the bid document. The bid price quoted in this bid is valid for the stipulated period. I/We confirm the availability of the proposed team members. I/We confirm that this bid will remain binding upon us and may be accepted by you at any time before the expiry date.

8.1 Pricing Schedule for this bid

All prices in SA Rand and VAT inclusive

All other additional information must be detailed separately.

Name and Surname: _____

Signature: _____

Date: _____

Are you duly authorized? To commit this bid: Yes or No

Capacity under which this bid is signed _____

TOTAL BID PRICE R ……..

THE AMOUNT IN
WORDS……

8.2 VALIDITY OF THE BID FOR THE PERIOD OF ACCEPTANCE

The bidder is required to complete the following information on the duration for acceptance of the bid, as follows:

The bid holds price fixed until _____

(State alternative period if less than 90 days after Bid closure, and 1 year After the bid bid)

Print Name: _____

Signature of bidder: _____

Name of Company: _____

Date: _____

9. DECLARATION OF INTEREST

9.1 Any legal person, including persons employed by the Sefako Makgatho Health Sciences University, or persons having a kinship with persons employed by the Sefako Makgatho Health Sciences University, including a blood relationship, may make a bid or bids in terms of this invitation to submit rfq (includes a price quotation, advertised bid, limited bid or proposal). In view of possible allegations of favoritism, should the resulting rfq, or part thereof, be awarded to persons employed by the Sefako Makgatho Health Sciences University, 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:

9.1.1 the bidder is employed by the Sefako Makgatho Health Sciences University; and/or

9.1.2 the legal person on whose behalf the bid 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.

9.2 In order to give effect to the above, the following questionnaire must be completed.

Full Name of bidder or his or her representative:_____

Identity Number: _____

Position occupied in the Company (director, shareholder): _____

Company Registration Number: _____

Tax Reference Number: _____

VAT Registration Number: _____

9.3 The names of all directors /shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee numbers must be indicated in below.

9.4 "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.

9.5 Are you or any person connected with the bidder presently employed by the state? **YES / NO** If so, furnish the following particulars:

Name of person (s) / director(s) / trustee(s) / shareholder(s)/ member_____

_____

Name of the division(s) at which you or the person connected to the bidder is employed: _____

Position occupied at Sefako Makgatho Health Sciences University:

_____

Any other particulars: _____

9.6 If you are presently employed by the Sefako Makgatho Health Sciences University, did you obtain the appropriate authority to undertake remunerative work outside employment in the Sefako Makgatho Health Sciences University? **YES / NO**

9.7 If yes, did you attached proof of such authority to the bid document **YES / NO** (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid)

If no, furnish reasons for non-submission of such proof:

_____

_____

9.8 Did you or your spouse, or any of the company's director's trustees / shareholders / members or their spouses conduct business with the University in the previous twelve months? **YES / NO** If so, furnish particulars:

_____

_____

9.9 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**

If so, furnish particulars:

_____

_____

9.10 Are you, or any person connected with the bidder; 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? **YES / NO**

If so, furnish particulars:

_____

_____

9.11 Do you or any of the partners / directors / trustees / shareholders / members of the company have any interest in any other related companies whether they are bidder for this contract? **YES / NO**

If so, furnish particulars:

_____

_____

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

Full Name	Identity Number	Personal Tax Reference	University employee

		Number	personnel number

9.13 Declaration

I, THE UNDERSIGNED (NAME) _____

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE SEFAKO MAKGATHO HEALTH SCIENCES UNIVERSITY MAY REJECT THE RFQ OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

_____	_____
Name and Surname of the bidder	Date
_____	_____
Position	Signature

10. PREFERENCE POINTS CLAIM FORM

This preference claim form must form part of all RFQs submitted. Before completing this form, Bidders must study the General Conditions and Definitions in respect of B-BBEE. This form serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution and it must be completed by Bidders claiming points in respect of B-BBEE Status Level of Contribution.

10.1 Claim Declaration

Bidders who claim points in respect of B-BEE Status Level Contribution must complete and provide the following information:

B-BBEE Status Level of Contribution: _____ (Maximum of 20 points (see above))

(Points claimed must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a sworn affidavit).

11. DECLARATION WITH REGARD TO COMPANY/ FIRM

11.1 Name of company/ firm _____

11.2 VAT registration number (if applicable): _____

11.3 Company registration number: _____

11.4 TYPE OF COMPANY/ FIRM [Tick Applicable Box]

- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited
- ☐ Partnership

11.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

_____

_____

_____

_____

11.6 COMPANY CLASSIFICATION [TICK APPLICABLE BOX]

- Manufacturer
- Supplier
- Professional service provider
- Bus transport company
- Other Transport Service Provider etc.

11.7 Total number of years the company/firm has been in business? _____

11.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in paragraph 9 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

11.8.1 The information furnished is true and correct;

11.8.2 The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.

11.8.3 In the event of a contract being awarded as a result of points claimed as shown in paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the Sefako Makgatho Health Sciences University that the claims are correct;

11.8.4 If the B-BBEE status Level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the Sefako Makgatho Health Sciences University may, in addition to any other remedy it may have to: cvb

11.8.4.1 disqualify the person from the bid process;

11.8.4.2 recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

11.8.4.3 cancel the contract and claim any damages which it has suffered as a result of having to make less favorable arrangements due to such cancellation;

11.8.4.4 restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from the Sefako Makgatho Health Sciences University for a period not less than 10 years, after the *Audi alteram partem* (hear the other side) rule has been applied; and

11.8.4.5 Forward the matter for criminal prosecution.

WITNESSES:

_____	_____
Name and Surname of witness 1	Date
_____	_____
Position	Signature
_____	_____
Name and Surname of witness 2	Date
_____	_____
Position	Signature

12. DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

12.1 This document 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 supply chain management system.

12.2 The rfq document of any bidder may be disregarded if that bidder, or any of its directors have:

12.2.1 Abused the Sefako Makgatho Health Sciences University's supply chain management system;

12.2.2 Committed fraud and or bribery or any other improper conduct in relation to such system; or

12.2.3 Failed to perform on any previous contract.

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

Item	Question	Yes	No
i.	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? (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 *audi alteram partem* rule was applied). **The Database of Restricted Suppliers now resides on the National** **Treasury's website** www.treasury.gov.za		
	If so, furnish particulars		
ii.	Is the bidder or any of its Directors listed on the Register for BID Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? **The Register for bidder Defaulters can be accessed on the National** **Treasury's** website www.treasury.gov.za		

	If so, furnish particulars

iii	Is 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?		
	If so, furnish particulars		
iv	Is 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?		
	If so, furnish particulars		

I, THE UNDERSIGNED FULL NAME_____CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

Name and Surname of the bidder _____ Date _____

Position _____ Signature _____

13. CERTIFICATE OF INDEPENDENT BID DETERMINATION

13.1 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 bid (or bid rigging). Collusive bid is a *per se* prohibition meaning that it cannot be justified under any grounds.

13.2 Treasury Regulation 16(A)9 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:

13.2.1 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.

13.2.2 Cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidder process or the execution of that contract.

13.3 This form serves as a certificate of declaration that would be used by the Sefako Makgatho Health Sciences University to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid -rigging.

13.4 In order to give effect to the above, the attached Certificate of bid Determination must be completed and submitted with the bid:

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid: _____

(BID Number and Description) in response to the invitation for 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)

i. I have read and I understand the contents of this Certificate;

ii. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;

iii. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;

iv. 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;

v. 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.

vi. 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 will not be construed as collusive.

vii. In particular, without limiting the generality of paragraphs via 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 rfq;
e. The submission of a bid, which does not meet the specifications and conditions of the bid; or
f. Bidders with the intention not to win the rfq.

viii. 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.

ix. 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.

x. 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 Sefako Makgatho Health Sciences University for a period not less than ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

_____ _____

Name and Surname of the Bidder Date

Position	Signature

14. TERMS OF REFERENCE

14.1 PURPOSE

The purpose of these terms of reference is to invite proposals from suitably qualified, experienced, and reputable service providers for the appointment of a service provider to provide actuarial consulting services for the valuation of the University's Post Employment Medical Benefits in terms of IAS 19- Employee Benefits.

14.2 BACKGROUND

The accounting standard (IAS 19) follows the principle that the cost of providing employee benefits should be recognised in the period in which the benefit is earned by the employee, rather than when it is paid or payable, and provides detailed guidance in particular about post-employment benefits.

The University accounts for the Post Employment Medical Benefits as Defined Benefit Plans in terms of the accounting standard (IAS 19). Defined Benefit plans create an obligation on the University to provide agreed benefits to current and past employees and effectively places actuarial and investment risk on the University.

14.3 OBJECTIVES

In conducting the actuarial valuation, the following principles of IAS 19 should be taken into consideration:

a) Reconciliation of the liability results between the previous valuation and the current valuation results;

b) A projection of the annual expenses for the five (5) years following the valuation date which includes post-employment medical benefit costs, liabilities and/or cashflow requirements as applicable, together with the key assumptions underpinning the projection

14.4 SCOPE OF WORK AND EXPECTED OUTCOME AND DELIVERABLE

The service provider is required to conduct an actuarial valuation of the post-retirement medical assistance obligation in respect of current university employees for annual reporting purposes. The current membership includes approximately 180 current pensioners and about 180 in-service employees.

14.4.1 The scope of the duties and functions of the appointed service provider can be summarized as follows:

a) Issue an actuarial valuation report on the post-retirement medical liability

obligation in respect of university employees.
b) The report should be specific on the amounts and accounting disclosures that are required to be shown in financial statements in line with IAS19.

14.4.2. The report needs to include the following:

a) Balance sheet liability.
b) An analysis of gains and losses.
c) Calculation of the various income statement components.
d) Accounting disclosures to assist in the finalization of the annual financial statements
e) Projection of the actuarial for the next reporting period, and
f) The report also needs to comply with APN301, the guidance note issued by the Actuarial Society of South Africa.

14.5. Competency and Expertise Requirements

- The service provider should have demonstrable experience in **IAS 19 post-employment**
- **medical benefit valuations**, preferably for universities/public entities or comparable
- organisations.
- The valuation must be performed and signed off by an appropriately
- qualified actuary with relevant experience in post-employment healthcare benefit
- valuations.
- The lead actuary must provide evidence of relevant professional membership
- and current practising authority/certificate, where applicable.
- The service provider should be registered as a Financial Service Provider under the Financial Advisory and Intermediaries Act of 2002 and have been issued with a license number.

14.6. Conduct of the Work

The service provider will have to provide a full report (with an Executive Summary) that covers the deliverables as per the terms of reference.
The service provider should provide final reports no later than 28 February every year.

14.7. Reporting requirements

The service provider will report to the and the Director: Financial Reporting and ED Human Capital.

15. Phase 1 Evaluation: Mandatory / Compliance check

15. 1 EVALUATION CRITERIA

15..1.1Administrative Compliance

Bidders were required to submit the below mandatory and pre-qualification documentation to be considered further in the tender.

No	Item	Attached (Yes/No)
1	A detailed methodology approach and project plan of action to achieve the scope of work	
2	Business registration certificate from the Companies and Intellectual Property Commission (CIPC)	
3	Copies of Identity Documents of all the directors / trustees /members/ shareholders	
4	Resolution of director(s) (authority to sign)	
5	Proof of tax compliance status e.g., valid tax clearance certificate or personal identification number (PIN) issued by South African Revenue Services (SARS)	
6	Proof of registration with the South African Council for the Property Valuers Profession (SACPVP) as a Professional Valuer or Professional Associated Valuer (without restrictions)	
7	Returnable forms	
8	Detailed pricing structure, an estimate of the professional fees, schedules, inclusive of disbursements, VAT, etc. for the entire proposed duration	
9	Proof of most recent Central Supplier Database (CSD) Registration- Printed during the month of the advert or after	
10	For partnerships, Joint Ventures, Consortiums and Cooperatives the following requirements should be complied with: Partnership The partners to submit a signed partnership agreement. Each partner to submit its mandatory compliance documents as required/ each partner to be compliant on its own.	

Table 1

	The partnership to delegate a partner/s to be appointed and designated to sign on behalf of the Partnership. Letter of appointment of the partner/s to be submitted s proof of delegation of authority to sign. Bank account in the name of the partnership. B-BEEE certificate of each partner. The lowest B-BBEE claim by one of the partner will be considered for evaluation purposes. Joint Venture Registration document of a Joint venture form the CIPC. The members to submit a signed joint venture agreement if incorporated. If the Joint venture is not incorporated it will be treated like a partnership. Each member/entity to submit its mandatory compliance documents as required/ each member to be compliant on its own. The Joint venture to delegate a partner/s to be appointed and designated to sign on behalf of the Joint venture. Letter of appointed member/s to sign as proof of delegation of authority. Bank account in the name of the Joint venture. A joint valid B-BEEE certificate to be submitted. Consortiums Members to submit a Consortium agreement. Each member/entity to submit its mandatory compliance documents as required/ each member to be compliant on its own. The Consortium to delegate a member/s to be appointed and designated to sign on behalf of the Consortium. Letter of appointed member/s to sign as proof of delegation of authority. Bank account/Bank accounts in the name of the Consortium. A joint valid B-BEEE certificate to be submitted	

A valid joint or non-joint (partnership) B-BBEE certificate from accredited verification companies for Large Enterprises with a turnover threshold exceeding R50M or a Sworn Affidavit for EME with a turnover threshold of up to R10M or a Sworn Affidavit for QSE with a turnover threshold of above R10M and below R50M. Non submission of the valid B-BBEE certificate or Sworn Affidavit or B-BBEE contribution level or letter from a qualified or certified accountant will result Zero (0) allocation of points.

1 5. 2 Functionality evaluation

The bidders were required to meet a threshold of 70 points and above for the functionality criteria listed in the table below.

Members of the BEC will evaluate the functionality stage of the tender. The functionality will be evaluated in terms of relevant company experience, Qualification of key personnel, experience of key personnel and project approach / methodology & implementation pla**n.**

Criterion	Key Components	Score
Company Experience	Appointment letter and reference letter of projects of similar in size and nature to be provided: • 5 reference letters – **30 point**s • 4 reference letters – **25 points** • 3 reference letter – **20 points** • 2 reference letter – **15 point**s • 1 reference letter – **10 points** • No reference letter – **zero points** The letter must be on the client's letterhead.	**30 Points**
Qualification and key personnel	Key personnel must be registered with the Actuarial Society of South Africa (ASSA) as professional actuaries without restrictions • Two (02) Registered Professional actuaries – 20 points • One (01) Registered Professional actuary– 15 points • Registered Professional actuaries or Professional Associated Actuaries who are not professionally registeredwith ASSA - 0 points	**20 Points**
Experience of key personnel	Experience of Key Personnel of Registered Professional Actuaries: Must Attach CV's Of Each Actuary (Key Personnel) • Registered Professional Property Actuaries – with 10 years and above experience in Actuarial valuation – **20 point**s • Registered Professional Actuaries – over 5 to 9 years' experience in actuarial valuation – **15 points** • Professional Actuary; – with 1 up to 5 years' experience – **10 points** • Professional Actuary; – with zero experience – **0 points**	**20 points**

Project methodology and implementation plan	Detailed Project Implementation Plan and Methodological Approach which includes (1) quality management plan (2) key activities, (3) milestones and (4) deliverables (5) resource allocation. The project schedule should indicate the project duration and milestones. • Project plan with 5/5 elements mentioned above - **30 points** • Project plan with 4/5 elements mentioned above - **25 points** • Project plan with 3/5 elements mentioned above - **20 points** • Project plan with 2/5 elements mentioned above - **15 points** • Project plan with 1/5 elements mentioned above - **10 point** • Project plan with 0/5 elements mentioned above or non-submission of a project implementation plan - **0 points**	**30 Points**
	Minimum Points= 70	
		100 Points

15.3 Stage 3: Evaluation in terms of PPPFA (Price and B-BBEE)

Points	Criteria	Document Required
80	**Price:** Points for the price will be allocated by the formula	Price schedule to be completed
20	**BBBEE:** Points on BBBEE will be allocated in accordance with the Service Providers' BBBEE status	Valid BBBEE Certificate from a SANAS accredited verification agency / sworn affidavit attested by the commissioner of oaths or CIPC

Price and B-BBEE will be considered using the following formula:

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

Where:

Ps = Points scored for price of tender under consideration Pt = Rand value of tender under consideration

Pmin = Rand value of lowest acceptable tender

i. B-BBEE Evaluation:

A bidder must submit proof of its B-BBEE status level contributor. Failing to submit proof of BBBEE status level of contributor or is a non-compliant contributor to B-BBEE may not be disqualified and will score 0 points out of 20 for B-BBEE. The allocation of points for B-BBEE is as follows:

BBBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-complaint contributor	0

15.4 PRICING SCHEDULE

The pricing schedule should cover costs associated with the following and priced across 3 years:

Cost Element	Year 1	Year 2	Year 3
Sub Total			
TOTAL FOR THE THREE YEARS			