



Company name of Bidder:

BID NO: 25/2022

FRAMEWORK AGREEMENT TENDER

TRAINING PROJECT: FACILITATION FOR VARIOUS TRAINING COURSES

SEPTEMBER 2022

This document is not for sale. Any entity that requests payment must be reported at the contact person indicated in this tender.

BID AMOUNT
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GENERAL REQUIREMENTS

The Department of Agriculture WC in its Programme Agricultural Producers Support and Development (APSD) is requiring service providers to present various training courses (as stipulated in CBD 4) to identified farmers in the Western Province.

The scope of works will include:

1. Various courses being delivered to a maximum of 20 beneficiaries / identified farmers in the Cape Winelands, Cape Metropole, Swartland, Overberg and Central Karoo districts.
2. Training providers to indicate clearly which initiative is being quoted on. Only one initiative to be quoted on. If there is more than one training initiative / course type separate tender/s to be completed.
3. The training provider to submit a proposal and quote. All costs to be included in the quote such as facilitation fee, course material, equipment, travel and accommodation.

Documents are available for the bidder to download from the following website address under the specific tender - <https://casidra.co.za/tenders/>

Documents for the purpose of this bid include:

1. Conditions to Submit Bid (Form CBD 2.1 (Lump Sum))
2. Price Form, Bill of Quantities and Schedules (Form CBD 3.1 (Lump Sum))
3. Scope of Works (Form CBD 4)
4. PPP Evaluation Form (Form CBD 5.1 (80/20))
5. Bank Entity Form (Form CBD 7), unless the banking details of the company indicate “verified” on the Central Supplier Database (CSD).

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6. Registration on the CSD for all suppliers is compulsory and registration numbers must be supplied.
7. Proposal and quote
8. Training programme

In accordance with Casidra’s Preferential Procurement Policy, this bid as further indicated in CBD 5.1/5.2 is subject to:

- **a functionality compliance test;**
- **B-BBEE certified bids will receive preferential scores;**

The successful bidder will be required to fill in and sign a written Contract Form (CBD 8).

BID DEADLINE: The closing date for the bid is 9 September 2022 strictly at 12H00.

SUBMISSION OF BIDS

Bids must be submitted in a sealed envelope with the name of the bidder and the inscription **“TRAINING PROJECT: FACILITATION FOR VARIOUS TRAINING COURSES – BID NO 25/2022.”** and placed in the bid box available at Reception of **Casidra’s** Head Office, 22 Louws Avenue, Southern Paarl. No faxed, emailed, counter-to-counter courier or posted bids will be accepted.

The following documents (including fully completed and signed **CBD** forms numbered 1 to **7** as supplied) must be **valid for a period of 90 calendar days** after closure of the bid and submitted as a bid packet:

Document number	Document description	Action required/comment	Mark
			√
CBD 1	General requirements	Signed	
CBD 2.1	Conditions to submit bid	Signed	
CBD 3.1	Price form (lump sum/measured)	Complete, sign	
CBD 3.1 Experience	Proof of previous work and contact details of three work-related references as well as written references (from persons that are qualified to comment on work).	Compulsory	
CBD 3.1 Rates	Unit rates for the works on the forms as supplied	Compulsory	
CBD 3.1 Changes	Indication if any changes are proposed in scope of works and cost implication.	If required	
CBD 3.1 Plant	List of equipment available	Compulsory	
CDB 3.1	Proof of competency	Valid/ compulsory	
CBD 4	Scope of works	Signed	
CBD 5.1 (80/20)	PPP Evaluation form	Complete, sign	
CBD 7	Bank Entity form (Not needed if “verified” on CSD)	Complete, bank stamp	
TCC of principle and sub-contractors	Registration and verification of Tax Clearance on CSD.	Compulsory	
BEE	B-BBEE Certificate or Sworn Affidavit (as applicable, see CBD 5 for detail)	Original affidavit or certified copy	

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		certificate/Valid/not compulsory	
CV's and Company profile	Detailed company profile including the core competencies of personnel and subcontractors	Compulsory	
PS & CF	Project schedule and cash flow projection	Compulsory	

All technical enquiries can be referred to Bridgette Bartes on 021 863 5000 / 082 719 9039 or email bbartes@casidra.co.za.

**Compliance with the Occupational Health and Safety Act and regulations apply. It is the responsibility of the Contractor to perform all services accordingly.
Take Note: Compliance in terms of the regulations will be strictly enforced and no lenience allowed.**

Tenderers to note changes in Health & Safety specification which must take into account COVID 19. Tenderers to allow for provision of additional Health & Safety measures in their bid price.

For definition of Construction works, see the Construction Regulations 2014 and definitions as in CBD 2.1

TAX CLEARANCE CERTIFICATE REQUIREMENTS

It is a condition of bid that the taxes of the successful bidder **MUST** be in order, or that satisfactory arrangements have been made with the South African Revenue Service (SARS) to meet the bidder's tax obligations.

In order to meet this requirement, bidders must ensure that they are registered on the CSD and their tax status on the CSD are indicated as compliant. If a discrepancy exist between the CSD and the SARS eFiling of the supplier, then a printed version of the Tax Clearance Certificate must be supplied by the supplier and the eFiling PIN number for verification of authenticity by **Casidra** on the SARS website.

Foreign suppliers with no tax obligation in South Africa must request from **Casidra** and complete a form SBD1 that will be submitted to SARS for verification and issuing of a Confirmation of Tax Obligation letter.

Where Consortia / Joint Ventures / Sub-Contractors are involved, each party must submit a separate Tax Clearance Certificate.

COIDA REQUIREMENTS

The aim of the COIDA Act is to provide for compensation in the case of disablement caused by occupational injuries and diseases, sustained or contracted by employees in the course of their employment, or death resulting from such injuries and diseases; and to provide for matters connected therewith.

Workers who are injured on duty or obtain an occupational disease can claim compensation for temporary or permanent disablement. If workers die as a result of an injury on duty, their

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dependants will also be entitled to claim compensation. Employers that registered their employees are protected against civil claims in this regard. The COIDA basically prevents employees covered by the act from suing their employers for damages in terms of common law.

Please note that the following employers are exempted and do not have to pay assessment fees:

- National and provincial state departments;
- Certain local authorities
- Employers insured by a company other than the Compensation Fund like Mutual Associations. There are currently two approved mutual associations:
 - Federated Employers Mutual Assurance (FEMA), for the building industry; and
 - Rand Mutual Assurance Company (RMA), for the mining industry.

According to prescription, anyone who employs one or more part- or full time workers **must register** with the Compensation Fund and pay annual assessment fees. The Compensation Fund is a trust fund that is controlled by the Compensation Commissioner and employer contributes to the Compensation Fund. The Commissioner is appointed to administer the Fund and approve claims lodge by employees or their dependants. This means that the Fund will compensate the employee or their dependants and not the employer.

Where a service provider does not have any personnel in employment at time of tender, an official tender letter for the respective bid from the Department of Labour must still be submitted indicating this status. A period of 14 days will be allowed after tender award for registration.

No other documents other than stated above, will be accepted.

CENTRAL SUPPLIER DATABASE

National Treasury indicated during 2015 the development and future use of the Central Supplier Database (CSD) as a way of simplifying the process of doing business with government.

The CSD will be the source of all supplier information for all organs of state and will reduce the exchange of compliance documents in paper form, eliminate multiple registrations with different organs of state and ultimately reduce the cost for both business and government by enabling electronic registration and verification process.

The CSD will interface with SARS to verify tax clearance certificates and the Companies and Intellectual Property Commission (CIPC) for business registration and business ownership information. The CSD will furthermore verify supplier information with the register for tender defaulters and database of restricted suppliers. (Please see Fact Sheet and CSD pamphlets.)

From 1 September 2015 prospective suppliers should self-register on the CSD website www.csd.gov.za. Apart from registering and capturing supplier information on the CSD, suppliers currently on any database of organs of state need to maintain their records through the existing supplier systems for the period 1 September 2015 to 31 March 2016. This period will be referred to as the Interim Period. During the Interim Period suppliers that register on the CSD must provide their CSD supplier number and unique security code that will be communicated to them as well as any other relevant documentation (not yet electronically verified by the CSD) to the organs of

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state they want to do business with. **Casidra** urges all their suppliers to please comply with the request.

During the transitional period until 31 March 2016 **Casidra** will migrate our current supplier database to CSD to ensure accuracy and validation of information prior to mandatory implementation of the database.

For more information please contact National Treasury ocpo.treasury.gov.za (http://ocpo.treasury.gov.za/Suppliers_Area/Pages/Central-Supplier-Database.aspx) or [Central Supplier Database for Government](https://secure.csd.gov.za/) (<https://secure.csd.gov.za/>).

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FRAMEWORK AGREEMENT TENDER

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SEPTEMBER 2022

GENERAL TERMS AND CONDITIONS OF BID

Definitions:

In this Agreement, unless the context clearly indicates a contrary intention, the following words will have the following meanings and cognate expressions will have corresponding meanings:

“Project Manager” means an official appointed and in charge of coordinating the project at **Casidra** SOC Ltd. in accordance with the provisions of this terms and conditions.

“Project” means **TRAINING PROJECT: FACILITATION FOR VARIOUS TRAINING COURSES** as further identified under the project name as above.

“Service level” means the stipulated criteria applicable to the indicated project, including any set of criteria relating to the performance of the Service Provider.

“Service Provider” means a Professional Service Provider with specialised skills, industry related knowledge and credentials of previous experience as being presented by the Service Provider to the Client in its marketing documentation or project proposal.

“Project Team” or “Steering Committee” means the people appointed by the Client and identified to guide the project and approve achievements.

“Client” or “the Client” means **Casidra** SOC Ltd.

“Employee” means a person employed in the public administration including persons contemplated in section 12A of the Public Service Act (advisors to executive authority) and a person performing similar functions in a municipality or a provincial public entity, whether permanently or temporarily.

“Family member” means a spouse (partner in marriage, customary union according to indigenous law or a relationship in which the parties live together in a manner

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Signature for Casidra		Signature for Service Provider

resembling a marital partnership), child, parent, brother or sister, whether such relationship results from birth, marriage or adoption.

Unless the context clearly indicates a contrary intention, any word denoting any gender includes the other gender, the singular includes the plural and vice versa, natural person includes artificial persons and vice versa and insolvency includes provision or final sequestration, liquidation or judicial management.

1. Service Specifications

The Service Provider shall pursue the project in accordance with the service specifications as per the Scope of Works, **CPBD 1**.

2. Changes In Scope Of Contract

2.1. In the event of any project being discontinued or any extreme condition/s that will lead to wasteful expenditure during the contract period, the Service Provider shall inform the Client accordingly, so as to:

2.1.1 cease the service in that particular project;

2.1.2 or for another project to be identified as a replacement project.

2.2. In the event of 2.1 and 2.3, notice in writing shall be given to the Service Provider with regards to change in scope.

2.3. The effect of such changes in terms of cost and deliverables due will be consulted with the Service Provider and agreed upon between the parties.

2.4. Other minor changes in scope will be done officially by means of a written Variation order, issued by the Client, indicating the effect on the scope, budget, duration and deliverables.

2.5. Directives by the Client that forms part of the current project scope, but only ensure the methodology, quality, clarity or presentation does not form part of the arrangement.

3. Framework agreement Bid

No unit price adjustment of whatever nature, except for decreases or increases in the Value-added Tax (VAT) and / or Variation Orders, shall be applicable in this contract. The Service Provider shall make provision in his/her price for possible fluctuations in costs and indicate such time related costs on **CPBD 3.2**.

4. Project Manager

The person appointed by the Client to act as the Project Manager, is Bridgette Bartes and is responsible for the project management of this contract and can be reached 082 719 9039 or 021 863 5000. Her email address is bbartes@casidra.co.za.

5. Acceptance of Bids

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The Client is not bound to accept the lowest bid nor is it required to give reasons for selecting one Service Provider in favour of another.

6. Expenses in Preparation of Bid

The Client will not be responsible for, nor pay any expenses for losses which the Service Provider may incur in preparation of this bid.

7. Value Added Tax

The total quoted price must include Value Added Tax. A **compulsory valid tax clearance certificate of the principle as well as the sub-contractors must be available on the CSD.**

8. Accounts And Payments

8.1 The Client and the Service Provider shall each appoint its project manager/supervisor that shall work in close cooperation in order to facilitate the flow of information, solving of problems, accounts, payments etc. between the parties.

8.2 Payment of accounts received by the Client in terms of the Services rendered, shall be effected within 30 days after receipt of a correctly completed and approved progress report or work module. The Client does not accept responsibility for delays in payment due to faulty accounts or paperwork.

9. Responsibility of the Client

The Client will:

9.1 ensure that payments are done in accordance with the agreed payment schedule.

9.2 Not unnecessarily and for an unreasonable period delay any approvals or directives that is needed for the project to proceed.

10. Responsibility of the Service Provider.

The Service Provider will:

10.1 Provide the necessary capacity to properly execute the project in terms of the Specifications.

10.2 Supply an adequate labour force in order to render an acceptable standard of service to the Client. This labour force is to conduct itself in an efficient and professional manner, in carrying out their duties.

10.3 The Service Provider's supervisor, who shall be identified in writing to the Client's representative and empowered to act for him/her, shall constantly be present in meetings. The supervisor shall attend to any problems or complaints that may arise, and directives given to him/her by the Client's representative shall be deemed to be given to the Service Provider. The supervisor must be contactable at all reasonable times, preferably to be equipped with a cellular phone.

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- 10.4 Conform to all Laws, Regulations or By-Laws of any Department of State, Provincial Administration or Local Authority which may be applicable hereto.
- 10.5 Be responsible for the travelling, accommodation, work tools and management of its services.

11. General

- 11.1 Under no circumstances must the Service Provider accept that it has been appointed without the completed documentation as described hereafter.
- 11.2 The successful Service Provider will be given notification in writing / by means of an appointment letter, and the signing of an Service Level agreement, together with this document, will form the contract.
- 11.3 The Service Provider is responsible to complete all the work according to the quoted price.
- 11.4 The attached form **CBD5.1**, "PPP – Evaluation Criteria of the Service Provider", **MUST** be completed, signed and handed in as part of the bid documents by the Service Provider.
- 11.5 The Service Provider must provide all details of any references of previous work of similar nature or that demonstrates the ability of the Service Provider to perform a task of this nature (refer "PPP – Evaluation Criteria: References of previous work").
- 11.6 The Service Provider hereby gives approval to the Client to conduct a "credit reference check" as part of the functional requirements in evaluation of this bid.
- 11.7 The Service Provider **must include** all relative information and documents as described in **CPBD1** with the bid in order to successfully complete the application.
- 11.8 NO TIPP-EX may be used to rectify mistakes or errors in the text or prices.

12. Cancellation of the project.

The Client retains the right to partially or completely, amend, award or cancel this project before appointing any Service Provider.

13. Evaluation of the bid

The awarding of bids are dependent on the special evaluation criteria as set out in the policies of **Casidra**. The evaluation criteria of this Preferential Procurement Policy is based on the "**Preferential Procurement Policy Framework (Act 5 of 2000)**" and related Regulations and updates.

Further detail on the application of this regulations is as in document **CBD 5.1**. Awarding of the bid is dependent on a preferential points system, and every presentation is measured against the specific evaluation criteria as shown. The

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completion and signing of this document is thus a pre-requisite to qualify as a service provider.

14. Declaration of interest

Any employee may not conduct business with the State or be a director of a public or private company conducting business with the State. (Public Administration Management Act 11 of 2014).

In view of possible allegations of favouritism, it is required that the bidder declare his/her position in relation to the Client. The bid may be disregarded if that bidder or its directors have abused the Client's supply chain management system, committed fraud or any other improper conduct in relation to such system.

An Employee, taking remunerative work outside public enterprise, should first obtain the necessary approval. Failure to submit proof of such authority may result in disqualification of the bid.

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The total price for this service must include all labour and material required for the proper execution of the work as described in the Scope of Works.

Take note: This tender will be evaluated on the criteria for a market related price. The full cost of the service and/or works must be indicated and may not be discounted or cross subsidised against another service, project, transaction or sale of goods. Such contributions discounted against the total project cost must be specified, itemised, costed and clearly indicated in the bid.

This prices must be valid for a period of **90** days from the date of closure of the bid to allow for evaluation and appointment.

The completion period of this service is 12 months starting from the day of appointment.

Completed works as described R _____

SUB-TOTAL R _____

(Compulsory to complete the unit rates table as well)

Value-Added Tax (VAT) R _____

GRAND TOTAL R _____

Are you registered in terms of sections 23(1) of 23(3) of the Value-added Tax act 1991(Act No. 89 of 1991) (Please circle your answer)

YES NO

If yes, provide your VAT registration number: _____

Signature: _____

Date: _____

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BILL OF QUANTITIES – MEASURED BID

NB. These quantities are given as a guideline for the bid and for the purposes of unit rates and will in no way be used as a measured bid. This is a **lump sum** bid.

ITEM NO	DESCRIPTION	UNIT	APPROX AMOUNT	UNIT RATE
1.	Facilitation			
			TOTAL	
2.	Training Material			
			TOTAL	
3.	Certification			
			TOTAL	
4.	Travel Cost			
			TOTAL	
5.	Accommodation			
			TOTAL	
6.	Reports / Presentation / Attendance Registers			
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7.	Other			
			TOTAL	

Notes:

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CHANGES MADE BY BIDDER

If the bidder wishes to make any changes to any of the bid conditions or specifications, or if he wishes to qualify his bid in any way, he must clearly set out his suggestions below. If he makes **ANY** changes and do not list them below, his bid will be disqualified.

If no changes or amendments are made, please indicate it below by writing **NONE** in the space below.

NB. Any changes made by the bidder outside the scope of works, resulting in not meeting pre-qualifying conditions or compulsory subcontracting, may influence the functionality of the end product and may result in the bid being disqualified.

Item	Suggested Change

If more space is required, please add a separate page.

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SCHEDULE: PROOF OF RELEVANT EXPERIENCE & REFERENCES

The following is a summary of works that have been completed successfully by bidder. In order to be compliant for this bid, the following detail **MUST** be included:-

- Supply at least three different (written / contactable) references (with contact numbers).
- The description of work must be relevant to the nature of this contract. For eg, do not list fencing projects completed when the scope of works is a structural steel store.

Employer (include contact information)	Description	Value of Work	Completed

If more space is required, please add a separate page.

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SCHEDULE: EQUIPMENT TO BE USED FOR THE WORKS

The following is a list of main items of equipment,

- (a) have available immediately, or
- (b) will purchase / hire if our bid is accepted.

Quantity	Description (Size, Capacity, etc.)	(a) or (b) as above

If more space is required, please add a separate page.

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SCHEDULE: CV / QUALIFICATION

The service provider must attach to this page **DETAILED & COMPREHENSIVE** proof of competency.

Please attach a complete CV and qualification/s for evaluation purposes relevant to this occupation of Training work.

If more space is required, please add a separate page.

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SCHEDULE: DETAILED COMPANY PROFILE

The service provider must attach to this page a **DETAILED & COMPREHENSIVE** company profile including core competencies of personnel. The company profile must summarize information about your organisation.

In order for a company profile to be compliant for this bid, the following detail **MUST** be included in the company profile.

- Company core business activities – Describe your products and services and markets in which you operate
- Company background – State number of years in business, location, history of company, etc
- Company resources – Number of employees, core competencies of personnel, structure of company - organogram

If more space is required, please add a separate page.

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PROJECT SCHEDULE AND CASH FLOW PROJECTION

If more space is required, please add a separate page.

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Scope of works

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1. Objective

- 1.1 The objective of this training programme is to secure the services of service provider/s that will design and develop content for the courses listed below in order to equip farmers with practical skills to manage their farms to become profitable businesses which embraces the innovation in becoming sustainable enterprises. Service providers are required to adapt their content to suit the needs of the diverse groups in the different districts while still conveying the core learning outcomes of the Programme.

2. Background

The Programme Agricultural Producers Support and Development (APSD) encompasses the broad development agenda of the Department of Agriculture – Western Cape. The Department aims to support smallholder farmers, subsistence farmers and commercial farmers and to enhance the capacity building, given the need to develop the emerging farming community in the area of jurisdiction, the mandate is to build capacity of historically disadvantaged communities and individuals from the Land Reform Programs.

The primary role and purpose of APSD is to:

- Ensure sustainable support for new and established farmers.
- To measure the impact of interventions as delivered by various programs.
- To leverage investment from the private sector and communities.
- To ensure quality and standards of service.

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- To facilitate development for qualifying farmers.

The scope of works will include:

The Department of Agriculture WC in its Programme Agricultural Producers Support and Development (APSD) is requiring service providers to present various training courses to identified farmers in the Western Province (Cape Winelands, Cape Metropole, Swartland, Overberg and Central Karoo districts) in the following disciplines: **(PLEASE CLEARLY INDICATE WHICH OF THE DISCIPLINES YOU ARE QUOTING ON AND THE DISTRICT. A SEPARATE TENDER DOCUMENT TO BE COMPLETED FOR EACH DISCIPLINE BEING QUOTED ON).**

- Plant Production (Irrigation, Vegetable Production, Seedling Production, Orchard Monitoring)
- Animal Production (Livestock Production, Pest and Disease Control, Pest Control, Pig Production, Pig Production and Biosecurity Programmes, Poultry Production, Sheep Sheering, Cash Crops Production OS2, Earthworm Farming)
- Basic Business Management and / Advanced Business Management *(please indicate clearly which of the two is being quoted for.)*
- Basic Financial Management and / Advanced Financial Management *(please indicate clearly which of the two is being quoted for.)*
- Introduction to Computers
- Compliance/ Accredited Training:
 - Firefighting US12484
 - First aid US 12483
 - First Aid US11651
 - Occupational Health and Safety (REPS)
 - Occupational Health and Safety (employees)
 - Safe handling of chemicals US 224073
 - Occupational Health and Safety US 259622

- Mechanisation:

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- Chainsaw Operator US 264195
- Solar pump maintenance

Training must be based on the **SHEP** approach, which essentially means that farmers' mindset must be transformed from “**Grow and Sell**” to “**Grow to sell**”. Farmers are sensitized to focus on the **markets first** before deciding what to plant in order to become a profitable business.

Exact dates and the number of farmers attending, to be finalised 2 weeks before commencement of Training, taking the venue capacity and social distancing into consideration.

SETA REQUIREMENTS:

- Training providers must be properly registered in terms of applicable legislation or comply with the requirements of the Department of Higher Education (professional qualifications)
- Training material must be aligned with the Unit Standard on the National Qualifications Framework (NQF) unless otherwise indicated, depending on the particular need of the farm.

SERVICE PROVIDER(S) MUST MEET THE FOLLOWING CRITERIA:

1. Must possess extensive knowledge of the requirements of smallholder farmers in the Western Cape.
2. Must have a minimum of 2 years' experience in the implementation of training projects related to the development of emerging farmers/ smallholder farmers in South Africa.
3. Must develop training material (in at least 2 of the 3 official languages of the Western Province) required for the implementation of the project.
4. The duration of the different courses ranges from 1- 5 days over 6 to 7 hours per day.
5. Must develop a training programme required for the implementation of the project, i.e. timeframes and topics/ course content to be covered for each day of the training.
6. Must provide training reports and attendance registers for each group of trainees within 7 days of completion of the course. The service provider may also be asked to make use of the WCDoA's attendance register.
7. Must conduct a monitoring and evaluation criteria to demonstrate the implementation of the training programme for each group of trainees. The service provider to complete and submit registration and evaluation forms for the training course

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8. Must provide and issue certificates to learners at the end of the course. Certificates to have both WCDoA and service provider's logo's on it.
9. Must possess relevant qualification to facilitate learning programmes for farmers and be registered with the relevant SETA and / or comply with DHET requirements – copies of qualifications must be attached.
10. Must understand agriculture in the Western Cape and the commodity approach.
11. Must have project management experience in executing projects related to smallholder farmers in agricultural environment.
12. Must be proficient in 2 of the languages of the Western Province and be able to present training in any of the 2 languages.
13. Service Provider must provide all equipment to implement the training course such as overhead projector, stationery, training manuals, etc.
14. The Training Provider to submit a proposal and quote. All costs to be included in the quote such as course material, travel, accommodation and facilitation.
15. The successful service provider will be expected to liaise with the WCDoA's official or Training Co-ordinator regarding all project requirements.

Bid documents technically clarified by:

NAME

TITLE

SIGNATURE

DATE

Head of Department sign off:

NAME

TITLE

SIGNATURE

DATE

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**FINANCIAL REGULATIONS
SECTION 22**

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**SUPPLY CHAIN MANAGEMENT – PREFERENTIAL PROCUREMENT POLICY -
EVALUATION CRITERIA
(PPP – EVALUATION CRITERIA)**

ONLY FOR USE OF BIDS FROM R30 000 TO THE MAXIMUM VALUE OF R50 MILLION

Casidra, as a Schedule 3D development and implementation agent for the Western Cape Provincial Government underwrites, and complies to, the Provincial and National developmental initiatives and administers funds on behalf of donors. Within this context, and because of the specific requirements of the donors for the application of the funds, the awarding of bids are dependent on the special evaluation criteria as set out in the policies of **Casidra**. The evaluation criteria of this Preferential Procurement Policy is based on the “**Preferential Procurement Policy Framework (Act 5 of 2000)**” and related Regulations.

Awarding of the bid is dependent on preferential points system, and every presentation is measured against the specific evaluation criteria as shown. **The completion and signature of the document is thus a pre-requisite to qualify as a service provider.**

GENERAL DETAILS: (Please print clearly)	
Registered Company Name	
Trading Name / Individual Full Name	
Company Reg Number / ID Number	
VAT Number	
CSD Supplier Number *	
CSD Unique Registration Ref Number *	
Postal Address	

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Postal Code			
Physical Address			
Postal Code			
CONTACT DETAILS			
Representative Name			
Telephone Number			
Cell Phone Number			
Fax Number			
Email Address			
Website Address			
OTHER DETAILS			
Main Business Type (<i>Please tick</i>)		Consultants & Professionals	
Tools & Equipment (Hardware)		Clothing & Textiles	
Office Supplies & Furniture		Accommodation & Transport	
Training & Mentorship		Printing & Advertising	
Event Services (Catering, Venue Hire)		Irrigation & Water Services	
Earthmoving & Heavy Machinery		Other Production Inputs	
Seed, Fertilizer, Chemicals		Livestock & Animal Production	
Construction Services		Repairs & Maintenance	
Vehicles & Implements		Municipal & Bulk Services	
Other (Please Specify)			
* Note that you HAVE to register on the Central Supplier Database (CSD) (www.csd.gov.za) before we can use you as a service provider.			

• **Section D – Designated Sectors – Local Content**

The following sectors in this bid are subject to a stipulated minimum threshold for local production and content:

Sector	Minimum Threshold (%)
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Not applicable	

Sub-contracting

Excluding any subcontracting requirements as a condition of tender, as indicated in CBD 1, the following general condition apply:

A Maximum of 25% of the value of the contract may be subcontracted without proof of the subcontractor B-BEE status:

- unless with proof of a subcontractor with equal or better B-BBEE points
- unless the subcontractor is an exempted micro enterprise with the capacity and ability to execute the subcontract.

In event of the above, full disclosure by the contractor must be made in the bid documents to **Casidra** with full details on the subcontractor as well as proof of the capacity and ability of the subcontractor to execute the work. Subcontracting a portion of the tender, without disclosure and approval by **Casidra**, the Contractor can be penalised up to 10% of the value of the contract.

Will any portion of the contract be sub-contracted? NO

If YES, indicate:

- (i) what percentage of the contract will be subcontracted?
- (ii) The name of the sub-contractor?
- (iii) The B-BBEE status level of the sub-contractor?
- (iv) Whether the sub-contractor is an EME? NO

Final points awarded to bid = (B) Price Max 80% + (C) B-BBEE Max 20%

Section A – Functional Requirements

Functional refers to: A service or product that is designed to be practical, useful, working or operating, taking into account factors like quality, reliability, viability, and durability and the technical capacity (time and resources) and ability (knowledge and skills) of the bidder to execute the works.

An offer that does not obtain the minimum score for each functionality criterion or the minimum weighted average for functionality as indicated, is not an acceptable tender. Is this bid subject to the evaluation of functional requirements? **YES /NO** (**Casidra** to indicate)

If “**YES**”, the following criteria will be used for evaluation:

No	Evaluation criteria	Weight (A)	Score (B)	Minimum score required	Total (A x B)
1	Experience of similar work	50%	For office use	4	For office use
2	References of previous work	50%	For office use	4	For office use
TOTAL SCORE - A minimum score of <u>80%</u> is required for functional requirements for this bid to be considered for further evaluation				% = Total / 5	For office use

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Functional Item	1 Poor: Non compliant	2	3	4	5 Excellent: Fully compliant
References from clients on similar nature related previous work	No references or very poor rapport by all three reference	Some minor problems experienced by all three references	Moderately good by all three references	Recommended by all three references	Highly recommended by all three references
Experience of similar work – (refer to company CV)	No experience	Limited exposure to work at hand	Not similar, but related	Similar work	High level similar work

Section B – Formula for Awarding of Price Points (Only to be considered if Section A has met the minimum requirement)

Unconditional discounts offered will be taken into account for determining the following point:

$$\text{Point} = 80 \left[1 - \frac{\text{Price} - P \text{ min}}{P \text{ min}} \right] \quad \text{where } P \text{ min is the lowest acceptable bid}$$

Section C – B-BBEE Contribution

no photostat copies of certification allowed) confirming annual turnover and level of black ownership or an affidavit issued by Companies Intellectual Property Commission (accounting officer for a Closed Corporation).

If a **start-up EME**, a clear, originally certified copy, of B-BBEE certificate issued by the CIPC for EME's only is accepted.

A **QSE that is less than 51% (50% or less) black owned** must be verified in terms of the QSE scorecard issued via Government Gazette and submit a clear, valid, originally certified copy of a B-BBEE Verification Certificate issued by SANAS.

A **QSE that is at least 51% black owned (51% or higher)** must submit an original, certified, dated and signed sworn affidavit confirming turnover and level of black ownership as well as declare its empowering status or an affidavit issued by Companies Intellectual Property Commission.

A **large enterprise** must submit a clear, valid, originally certified copy of a B-BBEE Verification Certificate issued by a verification agency accredited by SANAS.

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 level certificate.

A **trust, consortium or joint venture** (including unincorporated consortia and joint ventures) must

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submit a consolidated B-BBEE status level verification certificate for every separate tender.

Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

Bids of non-compliant contributors (no certificate) will be considered, but no points will be awarded for B-BBEE status.

The generic threshold for EME are R10 million, but depending on the sector, the threshold as set in the BEE charter for that sector will apply. (Tourism R2.5mill and Construction R1.5 mill)

B-BBEE Status level of contributor	Number of points	Points awarded	BEE recognition level
1	20	EME & QSE 100% Black owned For office use	135%
2	18	EME & QSE 51% + Black owned For office use	125%
3	14	For office use	110%
4 and EME	12	EME 51% < Black owned For office use	100%
5	8	For office use	80%
6	6	For office use	60%
7	4	For office use	50%
8	2	For office use	10%
Non-compliant contributor	0	For office use	0%

Market related pricing

If the bidder, whose tender has been compliant, and that received the highest overall points, do not offer a market related price, the offer may be negotiated with that bidder to be market related.

Are you willing to negotiate your offer? YES / NO (delete which is not applicable)

If a market related price cannot be negotiated, the offer for negotiation will be extended to the second highest point scoring bidder, then the third highest scoring bidder, where after, failing to reach any agreement, the tender will be cancelled.

Declaration of interest and Bidders past supply chain management practices

In terms of section 22 of the **CBD 2.1** Conditions of Tender document:

Are any family member, trustee, director, shareholder or member of the bidder in any way connected to the State?

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and/or

Do any potential conflict of interest exist, where the public duties (like being part of an approval or adjudication process) and private interests of the bidder, could improperly influence or lend inside trading information to the bidder?

and/or

Do the bidder have any relationship with a person that may be involved with the evaluation or adjudication of this bid? In view of possible allegations of favouritism, it is required that the bidder declare his/her position in relation to the Client.

If so, furnish particulars:

.....

The bid may be disregarded if that bidder or its directors have abused the Client’s supply chain management system, committed fraud or any other improper conduct in relation to such system.

- (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? (www.treasury.gov.za, follow the link at the bottom of the home page);
 - Listed on the register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act;
- (ii) Was the bidder or any of its directors;
 - convicted by a court of law (including a court outside of the RSA) for fraud or corruption during the past five years?
 - contract with any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?
- (iii) The contractor is not known to be insolvent, in receivership, bankrupt or being wound up, or has its affairs administered by a court or a judicial officer, has suspended its business activities, or is subject to legal procedures in respect of any of the foregoing.

If so, furnish particulars:

.....

IMPORTANT NOTES

Casidra reserves the right to:

- disregard any bids where the declaration (below) has not been signed;

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- change the point system of the policy without prior notification;
- negotiate prices based on market related pricing before award of the bid;
- accept parts of the bid items or split bids based upon item prices
- disclose the results of the points awarded on request;
- evaluate and award points according to the documentation supplied and evaluate functionality at its own discretion;
- award the bid to the qualifying Contractor with the highest number of points scored, unless the prices are not market related or on the basis of objective criteria stated in the tender documents, like fairness, safety, public interest and international suppliers;
- to award the bid to a Contractor which does not necessarily have the lowest price.

Other Notes:

- Final points scored will be rounded off to the nearest 2 decimal places
- In the event of equal scores, the offer with the highest B-BBEE score will be successful. If scores are still equal, and where functionality is part of the bid, the offer with the highest functionality score will be successful. If the scores are still equal, the drawing of lots will determine the outcome.

The bid may be cancelled if:

- all the bid offers received are higher than R50 million;
- circumstances change and there is no longer a requirement for this service;
- funds are no longer available or if there are insufficient funds available in the budget for the work;
- no acceptable bids and/or market related prices are received;
- there is a material irregularity in the tender process;
- false information were supplied by the bidder.

Cancellation of bid will be placed in the same media as initially advertised.

Bids which are suspected to supplied false information will be subjected the *alteram partem* rule. If proven that false information was supplied, disqualify the tender or terminate the contract, without payment and/or claims for damages incurred by such cancellation.

The Contractor will be liable for the recovery of all costs and damages suffered as a result of the misconduct or cancellation of the bid or less favourable conditions affecting the award of the bid.

Exclusion of the Contractor and its directors, who acted fraudulently, from any business with an organ of state for a period not exceeding 10 years after has been applied.

Declaration by the company submitting the bid:

I, _____

as the authorised representative of the company / CC / business hereby declare that, to the best of my knowledge the abovementioned information is true and correct and that I am duly authorized as a signatory of this bid. On behalf of my business I accept the terms and conditions as set out in this document. I will supply documentary proof of any information supplied herein on request and to the satisfaction of **Casidra**.

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In terms of the POPI Act I further give consent that my contact and company details as will be captured on the **Casidra** database may be shared with the role players/funders involved in the project and be used by **Casidra** for the purpose of further procurement.

Signature

Date

SUPPLY CHAIN PERFORMANCE MEASUREMENT

In order for **Casidra** to measure its supply chain efficiency and effectiveness, please assist us by answering the following questions:

- **What were the source that made you became aware of this bid being available.**

Mark with X

Personal Email invite to bid:	
Via a friend or business partner:	
National Government E-Tender website:	
Local Newspapers:	
Casidra own website:	
CIDB website	

Other: Specify.....

- **Was the time allowed to date of closure sufficient for you to compile an offer.**

No – too short	Yes - Sufficient	No - Too long
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BANK ENTITY FORM

1. DETAILS OF COMPANY / INDIVIDUAL: (Please print clearly)	
Full Name	
ID Number	
Company Reg Number	
VAT Number	
Postal Address	
Postal Code	
Physical Address	
Postal Code	
2. BANKING DETAILS	
Name of Bank	
Name of Branch	
Branch Code	
Account Number	
Type of Account	
3. CONFIRMATION BY BANK	
<p>We hereby confirm that the bank details under paragraph 2 of this form belongs to the individual / company under paragraph 1.</p>	
Date Stamp of Bank	BANK OFFICIAL
	Print Name:
	Signature:

For office use only:			
To be signed upon appointment of winning bidder to form the agreement between the parties			
Signature for Casidra		Signature for Contractor	