



INVITATION TO BID



YOU ARE HEREBY INVITED TO BID FOR OFF-SITE RECORDS MANAGEMENT SERVICES

ADVERT DATE: 25 August 2023

COMPULSORY BRIEFING 04 September 2023 **TIME:** 11H00 – 12H00

CLOSING DATE: 26 September 2023 **CLOSING TIME:** 12H00

BID NUMBER: JDA/CS/OREC/01/2023

BID DESCRIPTION: RFP - ARCHIVING AND RECORDS MANAGEMENT FOR A PERIOD OF 36 MONTHS

BID DOCUMENTS MUST BE DEPOSITED IN THE BID BOX SITUATED AT:

Offices of the Johannesburg Development Agency, 3 Helen Joseph Street (Formerly President Street), the Bus Factory, Newtown, Johannesburg, 2000

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

NB: NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE (see definition below)

¹ * MSCM Regulations: "in the service of the state" means to be –

- (a) a member of –
 - (i) any municipal council;
 - (ii) any provincial legislature; or
 - (iii) the national Assembly or the national Council of provinces;
- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999);
- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) An employee of Parliament or a provincial legislature.

ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:

Department: Procurement
Contact Person: Mr Siyambonga Gcobo
Tel: 011 688 7904 **Fax:** 011 688 7899 **E-mail:** sgcobo@jda.org.za

ANY REQUIRIES REGARDING THE PROJECT MAY BE DIRECTED TO:

Department: Corporate Services
Contact Person: Ms Christina Nkosi
Tel: 011 688 7866 **Fax:** 011 688 7899 **E-mail:** mnkosi@jda.org.za

PLEASE NOTE: TENDERS MUST BE SUBMITTED ON THE TENDER DOCUMENTATION ISSUED. TENDER DOCUMENTATION MUST NOT BE REPRODUCED OR REARRANGED. ANY ADDITIONAL INFORMATION MUST BE SUBMITTED AS A SEPARATE ATTACHMENT TO THE TENDER DOCUMENT FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED.

OFFER

**THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED)**

NAME OF BIDDER

BID NUMBER

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER CODE NUMBER

CELLPHONE NUMBER

FACSIMILE NUMBER CODE NUMBER

E-MAIL ADDRESS

COMPANY REGISTRATION NUMBER

NATIONAL CENTRAL SUPPLIER DATABASE NUMBER

VAT REGISTRATION NUMBER

TAX VERIFICATION PIN NUMBER

TOTAL BID PRICE Excluding Value Added Tax

TOTAL BID PRICE in words

.....

.....

..... Excluding Value Added Tax

SIGNATURE OF BIDDER

CAPACITY UNDER WHICH THIS BID IS SIGNED

DATE

SUPPLIERS DATABASE REGISTRATION

National Treasury launched the National Central Supplier Database (NCSD) with effect from 1 September 2015.

This will enable prospective suppliers to register their companies on the following website www.csd.gov.za

Transitional Period (1 September 2015 to 30 June 2016)

1. During the transitional period suppliers are requested to register on the website where all their essential information such as Tax Clearance Certificates, VAT, and Company Registration Numbers and CIPC business status will be verified.
2. When conducting business with the JDA, you will be requested to provide us with the following:
 - Supplier Number and;
 - Supplier Registration Security Code so we can print your real time information;
 - Banking details with bank Stamp and;
 - Certified BBBEE Certificate.

Once a supplier has registered on NCSD, it will no longer be a requirement to provide the JDA with an Original Tax Clearance Certificate.

After Transitional Period 1 July 2016

Effective 1 July 2016, the JDA will only award business to suppliers who are registered on NCSD and suppliers will no longer be required to provide information as stipulated above.

For more information on registration, please:

Mr. Siyambonga Gcobo 011 688 7811

To all our stakeholders

RE: The channels of reporting fraudulent and Corrupt Activities

The City of Johannesburg has a **zero-tolerance approach to Fraud, Theft, Corruption, Maladministration, and Collusion** by suppliers with employees. To reinforce this commitment, more channels have been added to report any Fraudulent and Corrupt activities.

Instances of corporate fraud and misconduct remain a constant threat to service delivery. The City of Johannesburg took a resolution to adopt strategic interventions aimed at combatting fraud and corruption. The City took a decision to centralize the reporting of fraudulent and corrupt activities through the establishment of an independent fraud hotline which is managed by independent service providers.

All people doing business with the Johannesburg Development Agency are encouraged to report any corrupt or illegal practice.

Employees are encouraged to report fraud, waste or other concerns suggestive of dishonest or illegal activities.

Anyone can report fraudulent and corrupt activities through one of the following channels:

- Toll free number.....0800 002 587
- Toll free Fax0800 007 788
- SMS (charged @ R1.50).....32840
- Email Address:.....anticorruption@tip-offs.com
- Web site:.....www.tip-off.com
- Free post:.....Free post, KNZ 138, Umhlanga, 4320



Let's join hands to take up the Fight against Fraud and Corruption in our society.

JOHANNESBURG DEVELOPMENT AGENCY

OFF-SITE RECORDS MANAGEMENT SERVICES Project Implementation for 36 months

Tender advertisement: **25 August 2023**
Compulsory Briefing: **04 September 2023**
Closing date: **26 September 2023**

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ANNEXURES

- A : Business Declaration
- B : Declaration of Interest
- C : Declaration of Past SCM Practices
- D : Particulars of Contracts Awarded by an Organ of State
- E : MBD9 Certificate of Independent Bid Determination
- F : Declaration on state of municipal account
- G : MBD 6.1 Preference points claim form in terms of the preferential
- H : Schedule of completed projects (Company experience)

COPY OF ADVERT

TENDERING PROCEDURES

Tender Notice and Invitation to Tender

BID DESCRIPTION: RFP- ARCHIVING AND RECORD MANAGEMENT SERVICES FOR A PERIOD OF 36 MONTHS.

BID NUMBER: JDA/CS/OREC/01/2023

The JDA is requesting proposals from experienced companies and joint ventures to render Off-Site records management services for a period of 36 Months. The Off-Site records management services must be provided either as a joint venture or with both services found within the same company.

Documents can be downloaded from the JDA website: www.jda.org.za and e-Tenders portal www.etenders.gov.za from 25 August 2023. Tenders must only be submitted on the tender documents that are downloaded from the stipulated websites only. The retyping of the tender document is not permitted.

Queries relating to the issue of these documents and procurement related issued may be addressed to Siyambonga Gcobo at Tel: (011) 688 7904; fax (011) 688 7899; or e-mail: Sgcobo@jda.org.za

Technical queries or queries relating to the project may be addressed to Ms Christina Nkosi at (011) 688 7899; fax: (011) 688 7876; or e-mail: mnkosi@jda.org.za

A compulsory Clarification Meeting will take place at the Johannesburg Development Agency, The Bus Factory, and 3 Helen Joseph Street, Newtown Monday, 04 September 2023 starting at 11h00.

The closing time for receipt of tenders is 12:00 p.m. on Tuesday, 26 September 2023. Telegraphic, telephonic, telex, facsimile, e-mail and late tenders will not be accepted.

Requirements for sealing, addressing, delivery, opening and assessment of tenders are stated in the Tender Data.

The JDA's selection of qualifying tenders will be at the JDA's sole discretion and will be final. The JDA does not bind itself to accept any particular tender and correspondence will be entered into with successful tenderer.

"WE ENCOURAGE ALL PEOPLE DOING BUSINESS WITH US TO REPORT ANY CORRUPT OR ILLEGAL PRACTICE, USING THE ANTI-FRAUD HOTLINE NUMBER: 0800 555 836"

1. **INTRODUCTION**

The Johannesburg Development Agency (JDA) is looking to appoint a service provider for the Off-Site records management services.

The appointment period envisaged is for a period of 36 months. The JDA will welcome all proposals which will cover the requirements as set out in this documentation.

Proposals for this appointment are invited by public tender.

2. **PROJECT INFORMATION**

2.1 **Background**

The successful service provider will be appointed by the JDA for Off-Site records management services.

Registration of service providers on the JDA database does not guarantee that the said service provider will be nominated and or awarded any contract by the JDA.

Service providers of Off-Site records management services who wish to be appointed must ensure that all forms are completed in full, together with all annexures and signed by authorised representatives.

Service providers for Off-Site records management services must ensure that all details, as required in this request for proposals and forms are complete, that the furnished information is correct and that the required returnable documents are attached to the proposal. Incomplete applications will not be considered for appointment as JDA service provider.

Submissions from Service Provider

Service providers of Off-Site records management services for 36 months will be vetted through a compliance process to determine that all information provided is correct and thereafter evaluated for capacity and capability to render services. The appointment of service provider for Off-Site records management services will be valid for a period of 36 months.

2.2 **Project Overview**

The JDA is requesting proposals from experienced service providers and joint ventures to render the provision of Off-Site records management services over a period of 36 months.

3. **SCOPE OF WORK**

Suitably qualified and experienced service providers are required to submit their proposals for Off-Site records management services.

In order for the service provider to be appointed, they must demonstrate that they have capacity, knowledge and experience to achieve the following outcomes:

3.1 Outcomes for Off-Site records management services

The Record Management process entails archiving of contract documents, indexing of records, storage of records, and retrieval thereof from time to time and adhere to POPIA in terms of the possession and recovery of JDA's records.

The service provider must ensure accurate, organised and reliable record-keeping which will ensure that an adequate audit trail is provided.

The prospective service provider/bidder is expected to provide a comprehensive and reliable off-site record archiving and retrieval system, comprising the following:

- a) A secure and safe archiving facility, which is suitable for the purpose and mitigates risks associated with records storage.
- b) An acceptable and effective records management system to enable the tracking and retrieval of documents.
- c) Retrieval services for stored records at the off-site storage facility and delivery to JDA offices. Retrieval of records may be scanned and e-mailed or hand delivered to JDA offices, upon request. The JDA shall ensure that the retrieval instructions are given by its duly authorized representative/s.
- d) The off-site storage facilities should be located within 70km radius from the JDA Offices.
- e) Provide storage boxes and tracking labels for records that will be transferred from the JDA to off-site storage.
- f) The collection and removal (delivery/ transportation) of records from the JDA offices to the off-site storage, as and when necessary.
- g) The information provided by the JDA will remain confidential and restricted to the JDA and the service provider must comply with the POPIA.
- h) All information stored will remain the property of JDA until destroyed by the JDA.
- i) It is the JDA's responsibility from time to time to nominate in writing the names of persons who will be its duly authorized representatives in relation to the services.
- j) JDAs require monthly reports from service providers.
- k) The JDA shall have unlimited access to information archived off-site.
- l) It is mandatory to obtain JDA approval before moving files between areas.
- m) The service provider shall assist the JDA in ensuring that its filing system complies with all the relevant regulations in terms of Archiving.

3.2 Requirements

Physical Inspection will be done by Johannesburg Development Agency officials

The following will be assessed Onsite: The existence of a storage facility and physical building that complies with the National Archives of South Africa. access-controlled systems site which is protected with electric fencing and is patrolled 24/7

- . Climate-controlled facility
- Waterproof
- Security

4. APPOINTMENT

The appointment is for a period of 36 months.

4.1 Notes

- 4.1.1 The bid is subject to the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations, 2022.
- 4.1.2 Applicants are to ensure that they have adequate resources to undertake the work under stringent timeframes.
- 4.1.3 The JDA reserves the right to ask tenderers to replace any member/s of the proposed team if they do not meet the JDA requirements.
- 4.1.4 Successful tenderers will be required to sign the JDA's Standard Form Agreement and appendices.
- 4.1.5 Bidders are to ensure that they have adequate resources to undertake the work under stringent timeframes.
- 4.1.6 The JDA reserves the right to ask tenderers to replace any member/s of the proposed team if they do not meet the JDA requirements.
- 4.1.7 Successful tenderers will be required to sign the JDA's Standard Form Agreement upon appointment.
- 4.1.8 No tender will be awarded to a bidder whose tax matters are not in order with SARS.
- 4.1.9 No tender will be awarded to a bidder who is not registered on CSD.

5. PRICING

Table below serves as a guide to pricing required from each bidder as follows.

- 5.1.1 Fees must include standard disbursements such as typing, reproduction, copying, binding of documents, telephonic / electronic and facsimile communications, courier, local travel and accommodation, etc.
- 5.1.2 The offer must be fixed for the duration of the contract.
- 5.1.3 **Tenderers must ensure that the final TOTAL FEE (Year1+ year2 and year3) is correctly carried to the "offer" page. The value recorded on the offer page will be regarded as the**

tendered amount to render services. Failing to price as required will result in the tender being disqualified.

5.1.4 Successful tenderers will be remunerated in accordance with JDA’s Standard Form Agreement.

Pricing Tables

Table 1

Take on Service fees		2024/2025 rates for 12 months (excl. VAT)	2025/2026 rates for 12 months (excl. VAT)	2026/2027 rates for 12 months (excl. VAT)
Standard Box packaging fee (Per Box)	Fee per box R _____ 200 boxes x12months R _____			
Packaging team fee (Per hour)	Fee per hour R _____ Maximum 4hours x12months R _____			
Data entry fee (per box)	Fee per box R _____ Maximum 200 boxes x 12 months R _____			
Scanning of Records for same day delivery	Fee per page R _____ Fee for 2000 pages R _____			

Total			
Total for 2024/2025, 2025/2026 and 2026/2027 rates per annum			

Table 2

Storage Fees		2024/2025 rate months (excl. VAT)	2025/2026 rates for 12 months (excl. VAT)	2026/2027 rates for 12 months (excl. VAT)
Standard Storage Box (per box)	Storage of box per box/ per month R_____			
	Storage of 5000 boxes per month x 12 R_____			
Take on from Previous service Provider, collection of boxes (total of 5000 Standard Boxes)	Take on from Previous service Provider fee per box. R_____			
	Take on from Previous service Provider fee x 5000 boxes R_____			
Monthly storage fee total of 50 Drawing storage Tubes AO size	Storage fee per tube/ per month R_____			

	Storage fee x 50 tubes / per month x 12 month			
	R _____			
Total		R		
Total for 2024/2025, 2025/2026 and 2026/2027		R		

Table 3

Collection Fees		2024/2025 rate for 12 months (excl. VAT)	2025/2026 rates for 12 months (excl. VAT)	2026/2027 rates for 12 months (excl. VAT)
Minimum collection fee (up to 100 Boxes) (Standard Storage Box)	Collection fee per box R _____ Collection fee (up to 100 Boxes) R _____			
Total		R		
Total for 2024/2025, 2025/2026, and 2026/2027		R		

Table 4

Delivery Fees		2024/2025 rate for 12 months (excl. VAT)	2025/2026 rates for 12 months (excl. VAT)	2026/2027 rates for 12 months (excl. VAT)
Same day delivery (up to 100 Boxes)	Same day delivery fee per box R _____	R		

(Standard Storage Box)	Same day delivery (up to 100 Boxes) R _____			
Next day delivery (up to 100 Boxes) (Standard Storage Box)	Next day delivery fee per box R _____ Next day delivery (up to 100 Boxes) R _____	R		
Total		R		
Total for 2024/2025, 2025/2026 and 2026/2027,		R		

Table 5

Products rates		2024/2025 rate for 12 months (excl. VAT)	2025/2026 rates for 12 months (excl. VAT)	2026/2027 rates for 12 months (excl. VAT)
Standard Box Base up to 100 boxes	Rate per standard box R _____ Standard Box Base up to 100 boxes R _____			
Standard Box Lid up to 100 Lids	Rate per standard box lid R _____	R		

	Standard Box Lid up to 100 Lids R _____			
Total		R		
Total for 2024/2025, 2025/2026 and 2026/2027,		R		

Table 6

Item	Total rates per table (excl. VAT)
Table 1	R
Table 2	R
Table 3	R
Table 4	R
Table 5	R
Total	R

Total Pricing for each year	Amount (R)
Year 1	
Year 2	
Year 3	
Grand Total (Year 1+Year 2+Year 3)	

*****THE GRAND TOTAL EXCLUDING VAT MUST BE TRANSFERRED TO THE OFFER PAGE.
***Only one offer should be transferred to the offer page, alternative offers will not be accepted**

6. NOTES

6.2.1 The bidder's submission must provide the JDA with sufficient information to enable the employer to make a sound and fair evaluation of the proposal. It must clearly indicate the relevant previous experience, capability, and capacity of the bidding entity to undertake the project. The proposal should use the same item numbers as below, using numbered dividers.

The following minimum documentation must be provided:

6.2.2 **THE "OFFER" PAGE MUST BE COMPLETED IN FULL AND SIGNED. Any bidder who fails to do so will be disqualified.**

6.2.3 **Tenderers are required to submit a detailed fee proposal based on the requirements set out in item 5 above and to ensure that the final TOTAL FEE IS CORRECTLY TRANSFERRED TO THE "OFFER" PAGE. Any bidder who fails to do so will be disqualified.**

6.2.4 An original valid BBBEE status level verification certificate substantiating the bidding entities BBBEE rating or a certified copy thereof. Only certificates issued by verification agencies accredited by the South African Accreditation System (SANAS), or by registered auditors approved by the Independent Regulatory Board of Auditors (IRBA) will be accepted.

An EME must submit a sworn affidavit confirming the following:

- **Annual turnover revenue of R10 million or less; and**
- **Level of black ownership**

Any misrepresentation in terms of the above constitutes a criminal offence as set out in the B-BBEE Act as amended.

6.2.5 Company registration documents.

6.2.6 A copy of the bidding entity's current municipal rates account in the name of the bidding entity or alternatively in the names of the directors / partners of the bidding entity.

6.2.7 The forms A to H annexed, must be scrutinized completely in full and submitted together with your quotation.

6.2.8 A corporate brochure alternatively a summary of the entity's background.

6.2.9 A schedule of completed contracts of a similar nature to this project. The following details must be included on the schedule:

- Description of the project
- Service rendered
- Name of employer / client and their representative's contact details
- Cost of the works

- Fee obtained for services
- Date of completion
- Letter of reference on the client's letterhead or with the client's company stamp that confirms project scope of work, service rendered and project value.

FAILURE TO COMPLY WITH THE REQUIREMENTS IN ITEM 6 ABOVE WILL RESULT IN TENDERERS BEING DISQUALIFIED FOR NON-COMPLIANCE OR NEGATIVELY SCORED IN TECHNICAL ASSESSMENT.

Note for consortium and joint ventures

- **EACH** party to a consortium and joint venture is to submit the requisite documents and / or information as requested in item 6 (ie.6.2.4 - 6.2.9, and 6.2.11 - 6.2.12)
- An Agreement or Heads of Terms recording the arrangement between the parties to the consortium / joint venture is to be submitted.
- A lead consultant is to be appointed and noted in the submission.
- A trust, consortium or joint venture will qualify for points for their BBBEE status level as an unincorporated entity, provided that the entity submits their consolidated BBBEE scorecard as if they were a group structure and that such a consolidated BBBEE scorecard is prepared for every separate tender.

Failure to comply with these conditions may invalidate your offer.

7. ASSESSMENT CRITERIA

Submissions will be evaluated on the criteria to follow:

- Compliance
- Technical
- Price and Empowerment
- Risk Tolerance

7.1 Compliance

Bidders will be disqualified in the following instances;

- If any of its directors are listed on the register of defaulters.
- In the case of a bidder who during the last five years has failed to perform satisfactorily on previous contracts with the JDA or any other organ of state after written notice was given to that bidder that performance was unsatisfactory, Or the contract was terminated.
- Bidders who did not complete, in full, the tender offer page (i.e., priced, all registration numbers provided and signed).
- Bidders whose tender document has been completed in pencil.

- Bidders whose document has been faxed.
- Bidders whose tender document has been received after the closing time.
- Bidders whose tender document has not been deposited in the tender box at the time of closing.
- Bidders who fail to price as required i.e., as stipulated in item 5 herein.
- Bidders who failed to attend the compulsory tender briefing session.
- Bidders who have any directors that are in the employment of the state.
- No award will be made to any bidder whose tax matters are not in order with the receiver of revenue (SARS).
- No award will be made to any bidder who is not registered on the National Treasury Central Supplier Database (CSD).
- If any bidder does not provide proof of certification or letter of compliance for off-side storage facilities from National or Provincial Archives.
- If any bidder does not provide a business Continuity Plan: (copy of the contingency plan for the documents stored in the off-site storage in case of an emergency or disaster.

7.2 Technical

The technical assessment is based on the criteria set out below namely (i) key returnable documents, (iii) Capabilities and (ii) the experience of the company (i.e., Off-Site records management services per item 6.12 above).

Tenderers will have to submit compliant documents and score a minimum number of points in the technical evaluation in order to be considered further in the evaluation process.

Total points 96

Minimum points required 57.6 which is 60%

	Total Points	Criteria	Description of Criteria	Points
A Key Returnable Documents	16	Company registration documents and CSD report	Points will only be allocated for key returnable documents submitted	N/A
		Current municipal account		N/A
		3 Years of audited financial statements		N/A
		Valid BBBEE certificate/s or affidavit Sworn under oath		N/A
		CTS letter from SARS (Tax pin)		N/A

		Certified copies of directors / partners / shareholders identity documents	N/A
		Forms A to H, completed in full and signed	16

	Total Points	Criteria	Description of Criteria	Points
A1 Company experience Experience on similar Completed archiving and records management services. Complete Annexure H	40 A total of 40 points is achievable for Company experience in similar completed projects under section	10 Years and above	Points will only be allocated for off-site records management services and retrieval services in the public sector. Project information contained elsewhere in the tender submission will not be considered.	40
		6- 9 years		20
		3-5 years		5
A2 Contactable references for archiving and records management service Contactable provided should be in line with A1(Annexure H)	40 A total of 40 points is achievable for Contactable references on archiving and records management services as per projects listed in annexure H	Five or more satisfactory references	Points will only be allocated for references on similar archiving and records management services in Annexure I References must be on the client's letterhead or on a document stamped by the client and must confirm the project description, services rendered, values and contact details in order to obtain the points. If any of the required information does not appear in the reference, zero points will be awarded.	40
		three to Four satisfactory references		20
		One to two satisfactory references		5

7.3 Price and Empowerment

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

The 80/20 preference point system will apply to this tender and the lowest acceptable tender will be used to determine the applicable preference point system. The 80/20 price/preference points system will be applied to the evaluation of responsive tenders up to and including a Rand value of R50'000'000 (all applicable taxes included), whereby the order(s) will be placed with the tenderer(s) scoring the highest total number of adjudication points.

Preference points shall be based on the Specific Goal as per below:

Awards UP TO R50 mil (VAT Inclusive)

The specific goals allocated points in terms of this RFP	Number of points allocated (80/20 system) (To be completed by the organ of state)	Evidence
Business owned by 51% or more - Women	10	<ul style="list-style-type: none"> • CSD, ID copy of owner/s of the business and shareholders' certificate.
Enterprises located within the City of Johannesburg Metropolitan Municipality	10	<ul style="list-style-type: none"> • CSD and proof of municipal account
Total Points	20	Failure to attach evidence will lead to scoring zero points

Having completed a technical evaluation, the procedure for the evaluation of technically qualifying tenders is Method 2 (Price and Preferences). The Preference Point System assigns a score to each tenderer based on the tender price and on the tenderer's empowerment goals. These scores are combined to determine an overall score for the tender. The tender with the highest score will be considered for acceptance.

7.4 Risk Tolerance

The JDA has adopted a Risk Tolerance Framework (RTF) which enjoins the JDA to consider its risk exposure to contractors / service providers in terms of the number of contracts awarded to a single contractor / service provider in a particular year.

In terms of the Risk Tolerance Framework, the JDA determines the risk exposure as excessive in instances where the value of the contracts for **individual** professional service providers (e.g. project managers / engineers / quantity surveyors / consultants) is either:

1. The greater of R8 million or four contracts / projects in the current financial year or
2. The greater of R12 million or six contracts / projects over two financial years (current year and previous financial year)

And in instances where the value of contracts for **multi-disciplinary** professional service provider (e.g. more than one discipline / service is provided by the same bidder) is either:

3. The greater of R12 million or six contracts / projects in the current financial year or
4. The greater of R20 million or nine contracts / projects over two financial years (current year and previous financial year)

A risk analysis shall be undertaken on the bidder with the highest number of points obtained, to determine whether the tenderer does not exceed the JDA's risk framework criteria as stated above. In other words, whether it falls within the ambit of the Risk Tolerance Framework as acceptable.

JDA reserves the right to award a contract to a bidder who has exceeded the threshold as stated above.

8. CLOSING DATE, TIME AND VENUE FOR SUBMISSIONS

The completed tender document shall be placed in a sealed envelope. The words:

“RFP - OFF-SITE RECORDS MANAGEMENT SERVICES FOR A PERIOD OF 36 months”

Must be written / typed clearly on the envelope.

TENDERERS ARE TO SUBMIT 2 COPIES OF THEIR PROPOSAL (1 ORIGINAL PLUS 1 COPY).

The envelope must be deposited in the tender box at the **Johannesburg Development Agency, Ground Floor, The Bus Factory, 3 Helen Joseph Street (Formerly President Street), Newtown** only between the hours of 08H00 and 17H00.

The Tender closes at 12h00 on Tuesday 26 September 2023.

Bids will be stamped on receipt. There will be a public opening of tenders from 12:00.

NO LATE / TELEPHONIC / FAXED / POSTAL TENDERS WILL BE ACCEPTED OR CONSIDERED.

The Johannesburg Development Agency's selection of qualifying tenders shall be in the Johannesburg Development Agency's sole discretion and shall be final. The Johannesburg Development Agency does not bind itself to accept any particular tender and no correspondence will be entered into.

Unsuccessful bidders will have the opportunity to query the award or decision within fourteen days(14) calendar days from the day of notification.

The tender offer validity period for this tender is 90 days.

Queries can be addressed in writing to:

Ms Christina Nkosi

E-mail: mnkosi@jda.org.za

ANNEXURE A: BUSINESS DECLARATION

Tender/RFP Number :

Tender/RFP Description :

Name of Company :

Contact Person :

Postal Address :

.....

Physical Address :

.....

Telephone Number :

Fax Number :

Cell Number :

E-mail Address :

Company/enterprise Income

Tax Reference Number :

(Insert personal income tax number if a one person business and personal income tax numbers of all partners if a partnership)

VAT Registration Number :

Company Registration Number :

1. Type of firm

- Partnership
- One person business/sole trader
- Close corporation
- Public company
- Private company

(Tick one box)

2. Principal business activities

.....
.....
.....

3. Total number of years company has been in business:

4. Detail all trade associations/professional bodies in which you have membership

.....
.....
.....

5. Did the firm exist under a previous name?

- Yes
- No

(Tick one box)

If yes, what was its previous name?

6. How many permanent staff members are employed by the firm:

Full Time :

Part Time :

7. In the case of a firm which renders services for different disciplines, how many permanent staff members are employed by the firm in the discipline for which you are tendering:

Full Time :

Part Time :

8. What is the enterprise's annual turnover for the last three years and what is the estimated turnover of current commitments from 1 July 2015 to 30 June 2016 (excl. VAT):

This authority may be cancelled by me/us giving **30 days'** notice in writing.

BANK :

BRANCH :

BRANCH CODE :

ACCOUNT NUMBER :

ACCOUNT HOLDER :

TYPE OF ACCOUNT :

CONTACT PERSON :

CONTACT NUMBER :

PLEASE INCLUDE ORIGINAL SIGNED AND STAMPED LETTER FROM THE BANK CONFIRMING THE COMPANY'S BANKING DETAILS, PHOTOSTAT COPIES AND LETTERS BEARING ELECTRONIC SIGNATURES WILL NOT BE ACCEPTABLE.

The undersigned, who warrants that he/she is duly authorised to do so on behalf of the company, affirms that the information furnished in response to this request for proposal is true and correct:

SIGNATURE :

NAME IN FULL :

CAPACITY :

DULY AUTHORIZED TO SIGN ON BEHALF OF:

DATE :

COMPANY STAMP

ANNEXURE B: DECLARATION OF INTEREST

- 1. No bid will be accepted from persons in the service of the state*.
- 2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.
- 3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.
 - 3.1 Full Name:
 - 3.2 Identity Number:
 - 3.3 Position occupied in the company (director, trustees, shareholder**)
 - 3.4 Company Registration Number:
 - 3.5 Tax Reference Number:
 - 3.6 VAT Registration Number:
 - 3.7 The names of all directors / trustees / shareholders / members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.
 - 3.8 Are you presently in the service of the state* **YES / NO**
 If yes, furnish particulars

 - 3.9 Have you been in the service of the state for the past twelve months? **YES / NO**
 If yes, furnish particulars

 - 3.10 Do you, have any relationship (family, friend, other) with persons in the service of the state and who may be

involved with the evaluation and or adjudication of this bid?
If yes, furnish particulars

YES / NO

.....
.....

3.11 Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

If yes, furnish particulars

.....
.....

3.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

If yes, furnish particulars

.....
.....

3.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

If yes, furnish particulars

.....
.....

3.14 Do you or any of the directors, trustees, managers, principle shareholders or stakeholders of this company have any interest in any other related companies or businesses whether or not they are bidding for this contract? **YES / NO**

If yes, furnish particulars

.....
.....

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

ANNEXURE C: DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities 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.
- 3 The bid of any bidder may be rejected if that bidder, or any of its directors have:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as a company or person 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 National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? (To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		

Item	Question	Yes	No
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.7.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Position

.....
Name of Bidder

.....
Date

ANNEXURE D: PARTICULARS OF CONTRACTS AWARDED BY AN ORGAN OF STATE* DURING THE LAST 5 YEARS cont.**

CLIENT	TECHNICAL MANAGER	NATURE OF WORK	VALUE OF WORK	YEAR COMPLETED

***** Organ of State means-**

- ◆ a) a national or provincial department;
- ◆ b) a municipality;
- ◆ c) a constitutional institution defined in the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- ◆ d) Parliament;
- ◆ e) a provincial legislature;
- ◆ f) any other institution or category of institutions included in the definition of “organ of state” in section 239 of the Constitution and recognised by the [Minister](#) by notice in the *Government Gazette* as an institution or category of institutions to which [this Act](#) applies

.....
Signature
(of person authorised to sign on behalf of the organisation)

.....
Position

.....
Name of Bidder

.....
Date

ANNEXURE E : CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

for
RFP - Off-Site records management services for a period of 36 months

in response to the invitation for the bid made by:

Johannesburg Development Agency

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)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. 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;
5. 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
6. 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 bidding.
7. In particular, without limiting the generality of paragraph 6 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 bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or

- (f) bidding with the intention not to win the bid.
- 8. 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.
- 9. 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.
- 10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No. 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No. 12 of 2004 or any other applicable legislation.

.....
 Signature Position

.....
 Name of Bidder Date

ANNEXURE F: DECLARATION ON STATE OF MUNICIPAL ACCOUNTS

A Any bid will be rejected if:
Any municipal rates and taxes or municipal service charges owed by the bidder or any of the directors to the municipality or a municipal entity, or to any other municipality or municipal entity, are in arrears for more than three months.

B Bid Information

i. Name of bidder:
.....

ii. Registration Number:
.....

iii. Municipality where business is situated
.....

iv. Municipal account number for rates:
.....

v. Municipal account number for water and electricity:
.....

vi. Names of all directors, their ID numbers and municipal account number.

1.
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2.
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3.
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5.
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6.
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7.
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C Documents to be attached.

- i. A copy of municipal account mentioned in B (iv) & (v) (Not older than 3 months)
- ii. A copy of municipal accounts of all directors mentioned in B(vi) (Not older than 3 months)
- iii. Proof of directors

I/We declare that the abovementioned information is true and correct and that the following documents are attached to this form:

.....

.....
.....

Signature

Date

ANNEXURE G: MBD 6.1: PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

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

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

1. GENERAL CONDITIONS

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

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

1.2 The applicable preference point system for this tender is the 80/20 preference point system.

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

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

1.4 The maximum points for this tender are allocated as follows:

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

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

6.1. POINTS AWARDED FOR PRICE

6.1.1. THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$P_s = 80 \left(1 - \frac{P - P_{min}}{P_{max} - P_{min}} \right)$$

Where

P_s = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

6.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 points is allocated for price on the following

basis: **80/20**

$$P5 = 80 \left(1 + \frac{Pt - Pmax}{Pmax} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

7. POINTS AWARDED FOR SPECIFIC GOALS

7.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

7.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both

the 90/10 and 80/20 preference point system.

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

THE SPECIFIC GOALS ALLOCATED POINTS IN TERMS OF THIS TENDER	MEANS OF VERIFICATION DOCUMENTS REQUIRED	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM)	NUMBER OF POINTS CLAIMED (80/20 SYSTEM) (TO BE COMPLETED BY THE TENDERER)
SPECIAL GOAL 1: HDI			
Business owned by 51% or more - Women	CSD, certified ID copy of owner/s of the business and shareholder's certificate.	10	
GOAL 2: PROMOTION OF LOCAL ECONOMY			
Enterprises located within the City of Johannesburg Metropolitan Municipality	CSD and proof of municipal account	10	

DECLARATION WITH REGARD TO COMPANY/FIRM

- 7.3. Name of company / firm
- 7.4. Company registration number:
- 7.5. TYPE OF COMPANY/ FIRM
- LI Partnership/Joint Venture / Consortium
 - LI One-person business/sole propriety
 - LI Close corporation
 - LI Public Company
 - LI Personal Liability Company
 - LI (Pty) Limited
 - LI Non-Profit Company
 - LI State Owned Company
- [TICK APPLICABLE BOX]

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

- a) The information furnished is true and correct;
- b) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- c) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- d) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favorable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

SIGNATURE(S) OF TENDERER(S)

<p>SURNAME AND NAME</p> <p>.....</p> <p>DATE.....</p> <p>ADDRESS.....</p>

ANNEXURE H: SCHEDULE OF COMPLETED PROJECTS (COMPANY EXPERIENCE)

The tenderer shall list below **projects completed** for this project i.e., Off-Site records management services.

CLIENT Company name and contact person's name, tel, cell & e-mail address	PROJECT Name and description	SERVICE RENDERED	PROJECT VALUE and FEE VALUE	START DATE	COMPLETION DATE

NOTE: Contactable references for the above listed projects must be provided. Said references MUST be on the client's letter head or on a document stamped and signed by client and must confirm the name of the project, description of the project, description of the service rendered, the value of the project, the completion date, and it must rate the service rendered.

.....
Signature

.....
Position

.....
Name of bidder

.....
Date