



INVITATION TO BID



YOU ARE HEREBY INVITED TO BID FOR PROFESSIONAL SERVICES

ADVERT DATE: **11 MARCH 2024**

COMPULSORY BRIEFING: **18 MARCH 2024**

BRIEFING TIME: **10H00**

CLOSING DATE: **15 APRIL 2024**

CLOSING TIME: **12H00**

BID NUMBER: **JDAMAIDBROKER/01/2024**

BID DESCRIPTION: **RFP – APPOINTMENT OF A MEDICAL AID BROKER SERVICE PROVIDER**

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: **Kgadi Mphela**
Tel: 011 688 7851

Fax: 011 688 7899

E-mail: kmphela@jda.org.za

ANY REQUIRIES REGARDING THE PROJECT MAY BE DIRECTED TO:

Department: Corporate Services
Contact Person: **Margaret Mazibuko**
Tel: 011 688 7800

Fax: 011 688 7899

E-mail: mmazibuko@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)**

NAMEOF 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:

Ms. Kgadi Mphela on 011 688 7813
Mr. Siyambonga Gcobo on 011 688 7811

To all our stakeholder

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

MEDICAL AID BROKER SERVICES

Project Implementation for three years

Tender advertisement: 11 March 2024

Compulsory Briefing: 18 March 2024

Closing date: 15 April 2024

BID NUMBER: JDAMAIDBROKER/01/2024

March 2024

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ANNEXURES

- A : Business Declaration
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- I : Schedule of completed projects

COPY OF ADVERT**TENDERING PROCEDURES****Tender Notice and Invitation to Tender****Bid Description: Medical aid broker services for 36 months****Bid Number: JDAMAIDBROKER/01/2024**

The JDA is requesting proposals from experienced companies and joint ventures to render Medical aid Broker services for a period of 36 months. Individual or Multi-disciplinary company's and Joint ventures are eligible to submit tenders provided that they satisfy criteria stated in the Tender Data.

Documents can be downloaded from the JDA website: www.jda.org.za and e-Tenders portal www.etenders.gov.za from the 16th 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 Claudia Mahlaule at tel: (011) 688 7851; fax (011) 688 7899; or e-mail: kmphela@jda.org.za.

Technical queries or queries relating to the project may be addressed to Ms Margaret Mazibuko at (011) 688 7866; fax: (011) 688 7899; or e-mail: mmazibuko@jda.org.za.

A compulsory Clarification Meeting with representatives of the Employer will take place at the Johannesburg Development Agency, The Bus Factory, 3 Helen Joseph Street, Newtown on 18 March 2024 starting at 10h00 to 11H00.

The closing time for receipt of tenders is 12:00pm on 15 April 2024. Telegraphic, telephonic, telex, facsimile, e-mail and late tenders will not be accepted.

Tenders must only be submitted on the tender documentation that is issued. The retyping of the tender document is not permitted.

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 002 587"

1. **INTRODUCTION**

The Johannesburg Development Agency (JDA) is requesting proposals from Medical Aid Brokers.

The appointment period envisaged is for three (3) years. 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**

Service providers who offer Medical Aid broker services and 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 who offer Medical Aid Broker 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 and placement in the panel of service providers.

Submissions from Service Providers

Service providers who offer Medical Aid Broker services 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 applied as and when required to. Acceptable professional registration of principal(s) / employed staff is a criteria for being appointed. Applications herein consent to any investigation the JDA deems necessary in validating any particulars presented in this request for proposal. If it is found that the consultants are not sufficiently capacitated to perform services within a specific category applied for, the consultant will not be appointed for that service category and will be informed of such decision.

The appointment of a Medical Aid Broker will be valid for a period of 36 months.

2.2 **Contract Objective**

The JDA wishes to appoint a Medical Aid Broker for a period of 36 months.

Service providers who offer Medical Aid Broker services must have at least 10 years' experience of offering medical aid broker services.

2. **SCOPE OF WORK**

The Scope of Work covered will comprise of the following:

- a. The provision of professional unbiased advice on behalf of the five (5) City of Johannesburg (CoJ) recognized medical aids to all CoJ employees to make informed decision when choosing medical aid scheme which will suit their healthcare requirements.
- b. Fulfilling a consulting service to the employees and pensioners.
- c. The provision of an advisory service to the company in the area of the utilization of benefits.

In addition to the above, the scope is also extended to cater for the following service to the Individual members;

- The broker will provide onsite service.
- Assistance with the completion of the application and amendments forms.
- Ensure that all new and amendment applications are correctly completed.
- Induct new employees via information session to be presented to explain the benefits and various medical schemes to the new members of the JDA
- Render member education to employees during year-end revision once schemes have launched new benefits and contributions for the forth coming year.
- Advice members on appropriate and suitable options within scheme of choice depending on affordability, member& health condition and level of benefits to establish which option will best meet the employees' needs.
- Render an effective support service.
- Establish claim and query collection holders at all work sites.
- Give feedback to members regarding the claim lodged with the medical aid.
- Query tracking: delivery membership cards together with records of the delivered cards.
- Membership tracking: Provide payroll with a copy of the application form on a control sheet

- Contact Centre: assist members with membership administration support

Service to Local Labour Forum

- Advisory and information service to be provided to JDA’s Labour Forum and departmental Management and Labour forums.
- Strategic consulting service.
- Advisory and information services to be provided to the JDA’s Executive Management Team.

Reports

No	Description	Frequency
1.	Schemes Health Profile	Quarterly
2.	Head Count Reports	Monthly
3.	Site visits schedules and Comprehensive Reports	Monthly
4.	Call Centre Statistics	Monthly
5.	Query Reports	Monthly
6.	Payment Reconciliations to the Medical Aid Schemes	Monthly
7.	Corporate Services — Field Services signs offs	Monthly
8.	Meetings	Monthly
9.	Pensioners Sign Off	Monthly

4. APPOINTMENT

The appointment of a Medical Aid Broker will be over a period of 36 Months .
The services required are outlined in item 2 above. This is followed by item 4.1 below which applicants are required to take note of.

4.1 Notes

- 4.1.1 Applicants are to ensure that they have adequate resources to undertake the work under stringent timeframes.
- 4.1.2 Disputes shall be settled in good faith between parties in an effort to resolve the dispute. If the dispute is not resolved at that meeting, the Parties will attempt to settle it by mediation.
- 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.

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- 4.1.4 Successful tenderers will be required to sign the JDA's Standard Form Agreement and appendices.
- 4.1.5 **Appointments for year 2 and year 3 will be dependent on satisfactory performance and budget availability.**
- 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 No tender will be awarded to a bidder whose tax matters are not in order with SARS.
- 4.1.8 No tender will be awarded to a bidder who is not registered on CSD.

5. PRICING

- 5.1.1 As per industry norm , the broker shall be paid by the Medical Aid schemes and not by the JDA.

6. PROPOSAL CONTENT

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:

- 6.1 **THE "OFFER" PAGE MUST BE COMPLETED IN FULL AND SIGNED.** Any bidder who fails to do so will be disqualified.
- 6.2 **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.
- 6.3 A 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.

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- 6.4 Company registration documents.
- 6.5 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.
- 6.6 Audited financial statements for the past three financial years.
- 6.7 Details of directors / partners / members and shareholders with certified copies of their identity
- 6.8 The bidding entity's certificated of professional membership/s to industry bodies
- 6.9 The forms A to J annexed, must be scrutinized, completed in full and submitted together with your tender.
- 6.10 A corporate brochure alternatively a brief summary of the entity's background.
- 6.11 Provide information on the individuals who will be assigned to **this project (NOT the entire company)**. The following **must** be addressed:
- Organogram
 - role/s and responsibility/ies on this project
 - relevant qualifications and attach proof hereof
 - number of years of relevant experience in the industry **and** in the proposed role
 - detailed CV's for each member of the team noting their specific relevant project experience **[project description, role and responsibilities, project value]**
 - individual memberships to professional associations and attach proof hereof
- 6.12 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.

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

- 6.13 **Submit proof that they are members of the Intergrated internet services Provider Association (ISPA)**

FAILURE TO COMPLY WITH THE REQUIREMENTS IN ITEM 6 ABOVE WILL RESULT IN TENDERERS BEING DISQUALIFIED FOR NON-COMPLIANCE OR NEGATIVELY SCORED IN THE 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.6.4 - 6.9, and 6.11 - 6.13)
- 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

The tender will be evaluated on the criteria below:

- Compliance
- Technical
- 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;
- **Bidders who do not provide proof of registration as a financial services provider**
- **Bidders who do not provide proof of accreditation with the medical aid schemes council**
- 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 and was terminated
- Bidders who did not complete, in full, the tender offer page (ie. 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 in the employment of the state.

7.2 Technical

The technical assessment is based on the criteria set-out below namely (i) key returnable documents, (ii) capability of the proposed key team members (i.e. experience, qualifications, and memberships to professional associations per Item 6.11 above) and (iii) the experience of the company and references 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.

The minimum points required for the **Medical aid broker Service Provider is 130,8 points which is 60% of 218 points.**

	Total Points	Criteria	Description of Criteria	Points
A Key Returnable Documents	18	Company registration documents	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
		Certified copies of directors / partners identity documents		N/A
		Forms A, B, C, D, E, F, G, H and I, cross check completed in full and signed		18

(i) KEY PERSONNEL	Total Points	Criteria	Description of Criteria	Points
B Capability of proposed key personnel per Item 6.11	100	Medical aid brokerage services Key Account Manager: The Medical aid brokerage services Account manager must have a minimum of 10 years of experience as Key Accounts Manager. 10+ years = 50 5-9 years = 30 1-5 years = 20	Points will only be allocated for experience on Medical aid brokerage services If <u>any</u> of the following information is not	50
B1	A total of 100 points is achievable for Capability of key personnel			

(i) KEY PERSONNEL	Total Points	Criteria	Description of Criteria	Points
<p>Detailed CVs indicating track record of the proposed key team members.</p>		<p>Brokers/Consultants Team : A team of at least 3 brokers .</p> <p>Each broker must have the following:</p> <ul style="list-style-type: none"> • A minimum 10 years experience as a broker • Must be accredited by the council for medical Schemes • Must have at least 5 years experience of working with municipalities • Must have and demonstrate at least 5 years experience in working with multiple medical aid schemes portfolio • Must be registered as a financial services provider 	<p>provided, zero points will be awarded:</p> <ul style="list-style-type: none"> • CVs provided must be as per the resources recorded on the organogram. • CV's must clearly show similar experience. • CV's must clearly show the role executed by the resource on the said projects. <p>Note that duplication of resources/personnel on the designations indicated in the criteria will result in zero points being awarded. Both CV and qualifications must be submitted, failure to do so zero points will be awarded.</p>	<p>50</p>

(ii) COMPANY EXPERIENCE	Total Points	Criteria	Description of criteria	Points
<p style="text-align: center;">C1</p> <p style="text-align: center;">Company Experience and Track record on Medical aid brokerage services as per 6.12</p>	<p>50</p>	<p>Company experience shall consist of the following ; Provide proof at least 5 projects completed with a portfolio of 5 or more medical aid schemes in the last 10 years with proof of placing clients in the local government space</p>	<p>Points will only be allocated for internet related projects as listed in the schedule requested in item 6.12. (Complete annexure I)</p> <p>Project information contained elsewhere in the tender submission will not be considered.</p>	<p>50</p>
		<p>Provide proof at least 3 projects completed with a portfolio of 5 or more medical aid schemes in the last 10 years with proof of placing clients in the local government space</p>		<p>25</p>
		<p>Provide proof at least 1 project completed with a portfolio of 5 or more medical aid schemes in the last 10 years with proof of placing clients in the local government space</p>		<p>10</p>
C2	50	Criteria	Description of criteria	Points
<p style="text-align: center;">Contactable reference (on client letter head) as per Medical aid broker services as per 6.12</p>		<p>Five or more satisfactory references</p>	<p>Points will only be allocated for references on similar projects as listed in the scheduled requested in Item 6.12</p> <p>References must be on the client's letterhead or on a document stamped by the client and must confirm the project description, services rendered in order to obtain the points.</p> <p>If any of the required information does not appear in the reference, zero points will be awarded.</p>	<p>50</p>
		<p>Only three to four satisfactory references</p>		<p>30</p>
		<p>Only one to two satisfactory references</p>		<p>10</p>

			*** If reference letters are not in line with projects provided in C1, zero points will be awarded.	
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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 – Black People	5	<ul style="list-style-type: none"> Valid BBEE certificate / Affidavit Sworn under oath Company Registration Certification Certified copy of ID of owners
Business owned by 51% or more - Women	10	<ul style="list-style-type: none"> Valid BBEE Certificate/ Affidavit Sworn under oath CSD report
SMMEs (An EME or QSE)	5	<ul style="list-style-type: none"> Valid BBEE Certificate/ Affidavit Sworn under oath CSD report
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.

8. CLOSING DATE, TIME AND VENUE FOR SUBMISSIONS

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

“Medical aid broker services ”

Must be written / typed clearly on the envelope.

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 15 April 2024.

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 (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:
Margaret Mazibuko
E-mail: mmazibuko@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):

R Year

R Year

R Year

R Year

9. List all contracts which your company is engaged in and have not yet completed:

CONTRACT DESCRIPTION	LOCATION	COMPANY/ EMPLOYER	PROJECT VALUE	ESTIMATED FEES	EXPECTED COMPLETION (MONTH & YEAR)

10. Banking details

I/We hereby request and authorize you to pay any amounts which may accrue to me/us to the credit of my/our account with the mentioned bank.

I/We understand that the credit transfers hereby authorized will be processed by computer through a system known as the “ACB Electronic Fund Transfer Service” and

I/We also understand that no additional advice of payment will be provided by my/our bank, but details of each payment will be printed on my/our bank statement or any accompanying voucher.

This 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 :

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 :

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? **YES / NO**

If yes, furnish particulars:

.....

.....

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, principal 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, principal 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, principal 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.

FULL NAME	IDENTITY NUMBER	STATE EMPLOYEE NUMBER

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

- * 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.

** "Stakeholder" means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.

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 – Provisioning of Medical aid brokerage 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.
 - 2.
 - 3.
 - 4.
 - 5.
 - 6.
 - 7.

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

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

Where

Ps = 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**

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

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 - Black People	CSD, Valid BBBEE	5	
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			
SMMEs (An EME OR QSE)	CSD and Valid BBBEE Certificate / Affidavit Sworn	5	

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 favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed nece

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

ANNEXURE H: ORGANOGRAM

The tenderer shall list below the key personnel proposed for this project in the discipline and designation being tendered for.

DESIGNATION	NAME AND SURNAME	SUMMARY OF QUALIFICATIONS & EXPERIENCE
<p>Key Account Manager 1 resource required</p>		
<p>Brokers/Consultants Team 3 resources required</p>		

NOTE: Detailed Curriculum Vitae (CV's) of the above proposed candidates must be provided. Said CV's MUST indicate the name and description of the project, role played in the project, project value, and the start and end dates of the project. In addition proof of relevant qualifications and of memberships to relevant professional associations must also be provided for the above proposed candidates.

.....
Signature

.....
Position

.....
Name of Bidder

.....
Date

ANNEXURE I: SCHEDULE OF COMPLETED PROJECTS

The tenderer shall list below a **maximum of 5 projects completed in the past 5 years of a similar nature and scale** to this project i.e., Medical aid brokerage services valued at a minimum of R 500 000.00.

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