



**DIRECTORATE: BUDGET & TREASURY OFFICE
SBU: REVENUE SERVICES**

QUOTATION DESCRIPTION	<u>APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF ACTUARIAL VALUATION SERVICES FOR POST-EMPLOYMENT MEDICAL AID BENEFITS, TWO-YEAR COMPARISONS ON PROVISION FOR LEAVE AND LONG SERVICE AWARDS AS 30 JUNE 2022</u>
QUOTATION NO.	Q80/2021/22
NAME OF THE SERVICE PROVIDER	
NAME OF COMPANY DIRECTOR	
PHYSICAL ADDRESS OF THE COMPANY	
TELEPHONE NO FACSIMILE NO. CELLPHONE NO	
EMAIL ADDRESS	
QUOTATION AMOUNT	
CLOSING DATE AND CLOSING TIME	FRIDAY, 27 MAY 2022 - 11H00
CSD NUMBER (Attach full, latest and valid CSD Report	

QUOTATION INVITATION

QUOTATION NO. Q80/2021/22 - APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF ACTUARIAL VALUATION SERVICES FOR POST-EMPLOYMENT MEDICAL AID BENEFITS, TWO-YEAR COMPARISONS ON PROVISION FOR LEAVE AND LONG SERVICE AWARDS AS 30 JUNE 2022

Quotations are hereby issued for **Appointment of a Service Provider for Provision of Actuarial Valuation Services for Post-Employment Medical Aid Benefits, Two-Year Comparisons on Provision for Leave and Long Service Awards as 30 June 2022.**

Quotation documents are available from the Office of the Supply Chain Management, 3rd Floor, Office 306, Civic Centre, Cnr. Landross Mare & Bodenstien Streets, City of Polokwane.

Complete quotation document, fully priced, signed and each page of the quotation document initialled must be sealed in an envelope marked; Quotation No. Q80/2021/22 - Appointment of a Service Provider for Provision of Actuarial Valuation Services for Post-Employment Medical Aid Benefits, Two-Year Comparisons on Provision for Leave and Long Service Awards as 30 June 2022. Closing date and time of the quotation is **Friday, 27 May 2022 at 11h00.**

Bidders must ensure that returnable quotation documents are deposited in the correct bid (tender) box which is opened 24 hours a day, 7 days a week at the above office. Bidders who submit bid documents which do not fit in the bid box, they should immediately inform the SCM (Tender Office) and security personnel for assistance. Couriered quotation documents should be addressed to Supply Chain Management (Tender Office) and highlight on the envelope as urgent to be deposited in the bid box. The Municipality will not in no uncertain terms accept and consider late submission of quotation documents due to failure by bidders to adhere to quotation terms and conditions and time schedules.

Council reserves the right to negotiate further terms, conditions and requirements of the quotation with the successful bidder.

This quotation will be subject to the Preferential Procurement Policy Framework Act, Preferential Procurement Regulations of 2011 as the bidder who scored the highest points on price and preference points will be appointed.

Polokwane Municipality shall adjudicate and award bids in accordance with B-BBEE Status Level of Contribution on 80/20 point system, 80 points for the price and 20 points for B-BBEE level status. Prospective bidders must accept that the bid will be adjudicated, according to the said legislation. Quotations will remain valid for a period of sixty (60) days.

General Conditions of the Contract (GCC) and, if applicable, any other special conditions of the contract will apply and any deviation from these conditions by the bidders will render their bid non-responsive and thus will be disqualified.

N.B: No quotation will be considered from persons in the service of the State(as defined in Regulation 1 of the Local Government: Municipal Supply Chain Management Regulations). Should it be found that the bidder has not disclosed his or her employment status with the State, the bidder's bid will be cancelled.

For specification enquiry, please liaise with **Ms. Vhutshilo J Tshikundamalema – 081 452 8105** Email: vhutshiloT@polokwane.gov.za.

IMPORTANT NOTICE

Polokwane Municipality would like to notify service providers that there is a scam going around where anonymous people call service providers to deposit money into their accounts with the promise of tenders. The Municipality would like to strongly distance itself and its officials from such scams.

All bidding information remains confidentiality during the evaluation and adjudication stage. No service providers are / will be allowed to access such information during that stage.

Successful service providers are always informed through appointment letters collected at the authorized municipal premises (specifically in the Office of the Manager: Supply Chain Management). No appointment letter, purchase order and Service Level Agreement (contract) will be collected outside the municipal premises.

Should service providers receive such calls, they should immediately visit the Municipality to verify the authenticity of the information and also open criminal cases at the nearest South African Police Services (SAPS) centre to conduct investigations.

The Municipality will not be held liable for service providers' financial loss should service providers receive such calls and deposit the requested monies into their accounts, The Municipality does not for whatever reason solicit monies from service providers in exchange of tenders. Service providers will only pay for purchase of bid documents.

Kind Regards

**MR. N.R. SELEPE
ACTING MUNICIPAL MANAGER
Cnr. Landross Mare & Bodenstein Street
Civic Centre, City of Polokwane**

RESPONSIVENESS AND EVALUATION CRITERIA

POLOKWANE MUNICIPALITY WILL NOT CONSIDER ANY BID UNLESS IT MEETS THE FOLLOWING RESPONSIVENESS CRITERIA

- The quotation must be properly received in a sealed envelope clearly indicating the description of the service and the bid number for which it is submitted.
- The quotation must be deposited in the relevant bid box as indicated on the notice of the bid on or before the closing date and time of submission of the bid
- An original and valid tax clearance certificate must be submitted with the quotation on or before the closing date and time and of the bid.
- Submission of copy of the company registration certificate attached to the quotation document on or before closing date and time of the quotation.
- Quotation document must be fully completed by using permanent ink pen with all pages of the quotation document initialed and assigned where it is required to do so. All alterations to the quotation document should be signed for by using permanent ink pen.
- Submission of original or certified copy of the company's B-BBEE Level Contribution Certificate attached to the bid document on or before closing date and time of the bid.
- Submission of the Joint Venture Agreement, where applicable, which has been properly signed by all parties to the agreement.
- Submission of relevant professional bodies certificates in the specific field as and when required.
- The bidder should submit the municipal rates and taxes statement of account which is not older than three (3) months and which is not in arrears of more than three (3) months. Lease agreement if renting offices or the lease should be valid and should be signed by both lessor and lessee or Lease agreement should be valid at the the time of the quotation request.
- The bidder shall submit a letter from the Tribal Authority if the offices are running in the rural area.
- Full compliance with the requirements of the bid and technical specifications
- Adherence to pricing schedules
- Compliance to the Preferential Procurement Policy Framework Act, PPPFA Regulations and other applicable legislations if required by this bid.
- The Council reserves the right to accept all, some, or none of the bids submitted, either wholly or in part and it is not obliged to accept the lowest bid.
- Completion of declaration of past SCM practices form, declaration of interest form and compulsory enterprise questionnaire.

By submitting this bid, the bidder authorises Council or its delegate(s) to carry out any investigation deemed necessary to verify the correctness of the statements and documents submitted and that such documents reasonably reflect the ability of the bidder to provide the goods and services required by Council.

Please Note:

The Municipal Manager may reject the bid or quote of any person if that person or any of its directors has:

- The person who committed a corrupt or fraudulent activity during the procurement process or in the execution of the contract
- An official or other role player committed any corrupt or fraudulent activity during the procurement process or in the execution of the contract that benefited that
- Failed to pay municipal rates and taxes or municipal service charges and such rates, taxes and charges that are in arrears with the bidder failing to make payments in terms of agreed payment arrangements.
- Failed during the last five (5) years to perform satisfactorily on a previous contract with the Polokwane Municipality or any other organ of the State after written notice was given to that bidder that performance was unsatisfactory.
- Abused the supply chain management system of the Municipality or have committed any improper conduct in relation to this system.
- Been convicted of fraud or corruption during the past five (5) years
- Willfully neglected, reneged on or failed to comply with any government municipal or other public sector contract during the past five (5) years; or
- 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) or has been listed on the National Treasury's database as a person prohibited from doing business with the State / organs of the state
- If the bidder has failed to complete the bid document in full. The bidder is not allowed to complete the bid document by using an erasable ink pen or reproducing the bid document electronically and type in the bidding information.
- If the bidder made alterations to the bid document by using an erasable ink pen and failing to sign for those alterations.

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I/We, the undersigned:

- a) Bid to supply and deliver to Polokwane Municipality all or any of the supplies and to render all the articles, goods, materials, services or the like described both in this and the other Schedules to this Contract;
- b) Agree that we will be bound by the specifications, prices, terms and conditions stipulated in those Schedules attached to this bid document, regarding delivery and execution;
- c) Further agree to be bound by those conditions, set out in Forms, MBD's, SBD's and the Annexures attached hereto, should this bid be accepted in whole or in part;
- d) Confirm that this bid may only be accepted by the Polokwane Municipality by way of a duly authorized Letter of Acceptance; and,
- e) Declare that, the relevant authorized person thereto will initial each page of the bid document and amendments.
- f) Declare that all information provided in respect of the bidder as well as the bid documents submitted are true and correct.
- g) Declare that documentary proof regarding aspects of the bid process or accidental thereto will, when required, be submitted to the satisfaction of the Municipality.

Signed aton this **Day of**

(Year).....

NAME OF THE BIDDER	
SIGNATURE OF THE BIDDER	
PROFESSIONAL BODY REGISTRATION NO.	
POSTAL ADDRESS	
DATE	
WITNESS 1 (Signature)	
WITNESS 2 (Signature)	

Details of Sole Proprietors and Partners in Partnerships

Name	Identity Number	Personal Income Tax Number

(Attach of identity Document, if bidder is a Sole Proprietor and/or partners in partnership)

State in cases where the bidder is a Company, Corporation of Firm by what authority the person signing does so, whether by Articles of Association, Resolution, Power of Attorney or otherwise.

I/We the undersigned am / are authorized to enter into this contract on behalf of.....

(Name of the bidder).....by virtue of being.....

(Portfolio).....dated.....attach a certified copy if which is attached to this bid.

NAME OF THE BIDDER	
SIGNATURE OF THE AUTHORIZED PERSON	
POSTAL ADDRESS	
DATE	
WITNESS 1 (Signature)	
WITNESS 2 (Signature)	

AUTHORITY FOR SIGNATORY

- Signatories for close corporation and companies shall confirm their authority by attaching to this form a duly signed and dated copy of the relevant resolution of their members or their board of directors, as the case may be.
- See an example of a resolution by members of close corporation or board of directors for information as shown below:

“By resolution of the board of directors passed on (Date: _____)

Mr/Ms. _____

Has been duly authorized to sign all documents in connection with the quotation for

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Signed on behalf of the company: _____

In his/her capacity as:

Date: _____

Signature of Signatories:

As Witness: 1. _____

2. _____

- Failure to submit the required agreement, the Municipality will not be responsible should there be any dispute between members of the company with regard to submission of this bid.

BIDDING INFORMATION

Details of Person(s) Responsible for Bidding

- The bidder is required and compelled to furnish full contact details to ensure that you are contactable during the bidding process if additional information is required during and after bidding process.
- Should there be changes to contact details; the bidder is allowed to approach the Municipality to submit amended contact information.

NAME OF THE BIDDING COMPANY	
NAME OF DIRECTORS / SHAREHOLDERS OF THE COMPANY	
POSTAL ADDRESS OF THE BIDDING COMPANY	
TELEPHONE & FAXSIMILE NUMBERS	
CELLULAR PHONE NUMBERS	
EMAIL ADDRESSES	
HAS VALID TAX CLEARANCE CERTIFICATE ATTACHED	
VAT REGISTRATION NO.	
HAS COMPANY REGISTRATION CERTIFICATE ATTACHED	
HAS COMPANY'S B-BBEE CERTIFICATE ATTACHED	
VAT REGISTRATION NO.	
NAME THE VERIFICATION COMPANY WHERE YOUR COMPANY OBTAINED THE B-BBEE LEVEL CERTIFICATE	

IS THE VERIFICATION AGENCY REGISTERED WITH SANAS	
WITNESS 1 (Signature)	
WITNESS 2 (Signature)	

- **The bidder is required to submit the B-BBEE Status Level Certificate to qualify for preferential procurement points. Failure to submit the B-BBEE Status Level Certificate, the bidder will not be allocated preference points.**

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QUOTATION SPECIFICATIONS

Polokwane Municipality provides Post-Retirement Medical Benefits, and Long Service Awards to qualifying employees and retired employees. Therefore, the Municipality will need to regularly make a determination of the costs involved and come up with future plans projections and cost-saving measures when dispensing such services. We are including the services for two-years comparisons on provision of leave.

The service provider is expected to look at the current practices of the benefits paid out and to come up with the best and sustainable practices that would be used by the Municipality in making proper analysis and assumptions about discount rates, expected rates of returns on assets, mortality rates and medical costs inflations.

Polokwane Municipality would like to appoint a service provider to provide Actuarial Valuation Services for Post-Employment Medical Aid Benefits, Two-Year Comparisons on Provision for Leave and Long Service Awards as 30 June 2022.

Interested service providers should liaise with the Project Manager to provide the information to be assessed in order to quote accordingly.

PRICING SCHEDULE - FIRM PRICES (PROFESSIONAL SERVICES)

Name of the Bidder	
Quotation Amount	
Closing Date	Friday, 27 May 2022
Closing Time	11H00

NO.	QUANTITY	DESCRIPTION	TOTAL PRICE
1		Actuarial Valuation Services	
Total (VAT Exclusive)			
VAT			
Total (VAT Inclusive)			

Please Note:

- **Bidders can attach a separate quotation in line with the items quoted in the document.**

OFFER TO BE VALID FOR NINETY (90) DAYS FROM THE CLOSING DATE OF QUOTATION

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The following evaluation process and criteria will be used to evaluate this bid:

1. Administrative Compliance – Phase One

1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions. Bids with obvious deviations from the requirements/conditions, will be eliminated from further evaluation.

1.2 **Critical Criteria:**

The following critical criteria have been identified for this quotations and any non compliance thereto will lead to the bidder being regarded as non-responsive and disqualified from further evaluation on functionality. Bidders will be required to submit the following documents and other administrative compliance requirements as follows:

- Valid proof of registration on the Central Supplier Database (CSD) by submitting a full CSD report which is tax compliant and which is valid. CSD number printed on the quotation document.
- Copy of the tax clearance certificate
- Copy of company registration
- Certified copy of the B-BBEE Certificate or certified copy of the B-BBEE sworn affidavit. All the certified copies should not be more than three (3) months of closing date of submission of the quotation
- Initialling of all pages of the quotation document
- Full completion of the quotation document and signing all the required sections including all the required witnesses
- Initialling of all pages of the quotation document
- Completion of the declaration of interest and signing thereof
- Municipal rates and taxes statement of account (original) or certified copy of the statement of account which is not more than three (3) months and which is not owing for more than three (3) months or. If you are tenant, a letter signed by yourself and the landlord must be prepared and signed and submitted
Lease agreement to be signed by both parties to the lease. The lease agreement should be valid. The lease agreement should be valid within the timeframe of quotation request or
Letter from tribal authority (kgosi) if the business is operating in the rural area. The letter should not be older than three (3) months

There will no evaluation on functionality, only price and preference points

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS OF 2011

This preference points form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution.

Before completing this form, bidders must study the general conditions, definitions and directives applicable in respect of B-BBEE as prescribed in the Preferential Procurement Regulations of 2011.

1 GENERAL CONDITIONS

1.1 The following preference points systems are applicable to all bids:

- **80/20** system for requirements with a Rand value from R30 000.00 to R50 000 000.00 (All applicable taxes included); and

1.2 **The value of this quotation is estimated not to exceed R200 000.00 (all applicable taxes included) and therefore the 80/20 preferential points system shall be applicable.**

1.3 Preference points for this bid shall be award for:

- (a) Price **(80)**, and
- (b) B-BBEE Status Level of Contribution **(20)**

The maximum points for this bid are allocated as follows:

Price	80
B-BBEE Status Level of Contribution	20
Total Points for Price and B-BBEE Status Level of Contribution is	100 Points

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 favoritism, 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 authorized representative declare their position in relation to the evaluating / adjudicating authority.
3. The Municipal Supply Chain Management Regulations regulates the status of persons who are in the service of the State but doing business with the State. The MSCM Regulations defines “in the service of the state” as follows:

<p>(a) a member of –</p> <ul style="list-style-type: none"> (i) any municipal council; (ii) any provincial legislature; or (iii) the national Assembly or the national Council of provinces; <p>(b) a member of the board of directors of any municipal entity;</p> <p>(c) an official of any municipality or municipal entity;</p> <p>(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);</p> <p>(e) a member of the accounting authority of any national or provincial public entity;</p> <p style="padding-left: 20px;">or</p> <p>(f) an employee of Parliament or a provincial legislature.</p> <p>² Shareholder” 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.</p>
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- 4 In order to give effect to the above, the following questionnaires must be completed and submitted with the bid:

Full Names of the Bidder or His Representatives	
Identity No.	
Position Occupied in the Company (Director, Trustee, Shareholder)	
Company Registration No.	

Tax Reference No.	
VAT Registration No.	
Name of all Directors / Trustees / Shareholders Members, identity numbers and state employee numbers must be indicated	
Are you presently in the service of the State? (Yes or No) . (If Yes, please furnish particulars	
Have You in the Service of the State in the Past Twelve (12) Months (Yes or No) . If Yes, please furnish details	
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 or No) . If Yes, Please furnish details	
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 or No) . If Yes, please furnish details	
Are any of the company's directors, trustees, managers, principal shareholders or stakeholders in service of the State? (Yes or No) . If yes, please furnish details	
Are any spouses, child or parent of the company's directors, trustees, managers, principal shareholders or stakeholders in service of the State? (Yes or No) . If Yes, please furnish details	

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 business whether or not they are bidding for this contract. Yes or No. If yes, please furnish details.	
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Please provide full names, identity numbers and personnel numbers of persons employed by the State as follows:

NO.	FULL NAMES & SURNAME	IDENTITY NO.	STATE EMPLOYEE NUMBER

SIGNATURE OF THE BIDDER

DATE

NAME OF THE BIDDER

POSITION