



WITZENBERG

Municipality • Munisipaliteit • UMasipala Wase

Reference/ Verwysing/ iRef: 08/2/20/37
Enquiries/ Navrae/ Imibuzo: S Mentor

04 November 2022

TO WHOM IT MAY CONCERN

Dear Sir/ Madam

REQUEST FOR FORMAL WRITTEN PRICE QUOTATIONS:

(Over R30 000.00 up to a transaction value of R200 000.00 VAT included)

Kindly furnish us with a written quotation for the supply of the following:

SERVICE PROVIDER FOR COMPILATION AND MAINTENANCE OF SUPPLEMENTARY VALUATION ROLL

This bid document must be placed in a sealed envelope. The following particulars must appear on the outside of the envelope: **"BID 08/2/20/37: SERVICE PROVIDER FOR COMPILATION AND MAINTENANCE OF SUPPLEMENTARY VALUATION ROLL, the name and address of the bidder and the closing date of this bid.** The sealed envelope must be put in the bid box located at the entrance of the Witzenberg Municipal Head Office, 50 Voortrekker Street, Ceres by no later than **Monday, 14 November 2022 at 10:00.** The bid box is generally open 24 hours a day, 7 days a week. Telephonic, facsimile, electronic/ e-mailed and late bids will not be accepted. Bids may only be submitted on the bid documentation as provided by the municipality.

The following conditions will apply

- Price(s) quoted must be valid for at least ninety (90) days from date of your offer.
- Price(s) quoted must be firm and must be inclusive of VAT.
- A firm delivery period must be indicated.
- This quotation will be evaluated in terms of the 80/20 preference point system.
- The bids are subject to the Preferential Procurement Regulations of 2017 that was promulgated by the Minister of Finance on 20 January 2017 in Government Gazette No 40553. These conditions are available on request.
- The successful provider will be the one scoring the highest points.
- Payments to the successful bidder in terms of this contract will be processed within 30 days after receipt of a valid tax invoice for goods and/or services rendered to the satisfaction of the municipality.
- The checklist at the back of the bid document must be completed and adhered to.

NB: No quotations 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 dated 30 May 2005)

Failure to comply with these conditions may invalidate your offer.

Yours faithfully

D NASSON
MUNICIPAL MANAGER

REQUEST FOR A FORMAL WRITTEN PRICE QUOTATION

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE WITZENBERG MUNICIPALITY

BID NUMBER: 08/2/20/37

CLOSING DATE: 14 November 2022

CLOSING TIME: 10:00

DESCRIPTION: SERVICE PROVIDER FOR COMPILATION AND MAINTENANCE OF SUPPLEMENTARY VALUATION ROLL

The following conditions to bid exist:

(Failure to comply may result in your bid being disqualified)

1. Bidders should ensure that bids are delivered timeously to the correct address as indicated below. If the bid is late, it will not be accepted for consideration. The bid box is generally open 24 hours a day, 7 days a week. **Telephonic, facsimile, electronic/mailed and late bids will not be accepted.**
2. All prices must **include VAT.**
3. Bids will be evaluated according to the 80/20 points system as stipulated in the Preferential Procurement Regulations of 2017 that was promulgated by the Minister of Finance on 20 January 2017 in Government Gazette No 40553.
4. An original or certified copy / copy of the bidder's Broad-Based Black Economic Empowerment (B-BBEE) certificate must be attached to this bid document in order to claim B-BBEE points.
5. Bid documents can be obtained during office hours from Monday to Thursday: 8h30 -13h00 and 13h45 - 15h30 and Fridays: 8h30 – 13h00 and 14h00 – 14h30 from the Witzenberg Municipality, Supply Chain Unit, Drommedaris Street, Ceres at a cost of **R 30.00** per set. The bid documents are also available on our website at <http://www.witzenberg.gov.za/resource-category/tenders?category=92>
6. The bids will be opened in the Council Chambers, Municipal Offices, 50 Voortrekker Street, Ceres in public immediately after the closing time at 10:00.
7. The bid must be properly received in a sealed envelope which must clearly indicate the description of the bid, the bid number and the name and postal address of the bidder on the outside of the sealed envelope. Unmarked bids will not be taken into consideration and will be returned.
8. The lowest or any bid shall not necessarily be accepted and the Municipality reserves the right to accept any part of the bid.
9. **Bidders must provide a valid Tax Verification Details (Tax reference number and valid third party verification pin) as issued by SARS in order to confirm their tax compliance status. Failure to provide such details may result in your bid being disqualified.**
10. Do not dismember this Bid Document (do not take it apart or put documents between its pages).
11. All other documents of the submission must be **attached behind** this bid document.
12. The bidder must complete the checklist at the back of this bid document.
13. **Please note that any suspicious collusive bidding behaviour and restrictive practices by bidders will be reported to the Competition Commission for investigation and possible imposition of administrative penalties.**

NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE AS DEFINED IN THE MUNICIPAL SUPPLY CHAIN MANAGEMENT REGULATIONS (GOVERNMENT GAZETTE NO 27636 DATED 30 MAY 2005)

SUBMISSION DETAILS

SUBMISSION OF BID DOCUMENTS:

TO BE DEPOSITED IN:

The bid box at the entrance of the Municipal Offices of Witzenberg Municipality
50 VOORTREKKER STREET, CERES

CONTACT DETAILS FOR ENQUIRIES:

Miss S Mentor Tel: (023) 312-1765: Email: supplychain@witzenberg.gov.za

D NASSON
MUNICIPAL MANAGER

WITZENBERG MUNICIPALITY
TERMS OF REFERENCE (TOR)

1. SCOPE

1.1 Purpose

The Witzenberg Municipality is calling for bids from experienced and suitably qualified valuers for the compilation and maintenance of the **Supplementary Valuation Roll** and related services in compliance with the Local Government: Municipal Property Rates Act, 2004 (Act No 6 OF 2004) AS amended, for the financial year 2022/2023 for the following areas within its area of jurisdiction:

- Ceres
- Prince Alfred's Hamlet
- Wolseley
- Tulbagh
- Op die Berg
- Rural areas including Ceres Karoo

The valuation process generates a substantial percentage of municipality's income and therefore the municipality could suffer significant detriment, if the valuation services provided are not accurate. There is also a significant customer service focus associated with the valuation process that impacts on the municipality's image.

The successful Bidder(s) must commit themselves to strict confidentiality both during and after their appointment.

Bidder(s) must ensure that no conflict of interest occurs during the valuation process and if any potential conflict arises, the Bidder must inform the municipality accordingly.

Municipality will provide the Bidder with certain data as detailed in **paragraph 15** of page 17 of the bid document.

Any further data or information required fulfilling the requirements of the Act and the specific requirements of the municipality shall be for the sole account and responsibility of the Bidder.

Current State:

The Municipality has appointed a service provider for the compilation of the valuation Roll and supplementary valuation ROLL as well as the maintenance until period ended 30 June 2019.

Four (4) supplementary valuations has been completed after the last general valuation.

1.2 Pre- qualification criteria

- 1.2.1 Bidder must be or have in their employment a registered Professional Valuer or Professional associate Valuer in terms of the Property Valuers Profession Act, 47 (Act No. 47 of 2000). (Proof of Registration must be submitted with the tender.)

1.3 Special conditions of contract:

- 1.3.1 Bidder shall submit proof of Professional Indemnity Insurance relating to the nominated person/s to a minimum value of R 1,000,000.00 and Public Liability Insurance held by the bidder for a minimum value of R 500,000.00. Proof must be submitted within 21 working days after the bid is awarded.

1.4 Functionality Criteria

The following functionality is applicable:

Evaluation Criteria		Maximum Points Allocated
Number of municipal projects completed	2 points for every project completed.	10
Number of municipalities	Number of municipalities where more than 15 000 Properties were valued: 2 points per Municipality	10
Number of Qualified Valuers	Number of Qualified Valuers permanently employed- 10 Points per valuer	20
Experience of Professional Valuer	See below criteria	20
TOTAL POINTS		60

Experience:

Bidders must attach a list of all projects that have been successfully completed or currently appointed for during the past six years. Bidders must clearly reference this attachment. Up to 20 tender evaluation points will be awarded for experience.

All relevant experience shall be scored in terms of years from registration date. Number of Years Points

Number of Years	Points
0-5 Years	5
6-10 Years	10
11-14 Years	15
More than 15+ Years	20

In addition, the comprehensive CV of the Professional Valuer must be attached to proof the experience in valuation services.

Bids must achieve a minimum number of 50 points for functionality. Bids that fail to achieve the minimum number of functionality points will be disqualified.

Failure on the part of the bidder to provide any of the documents or validate any claims made above will result in functionality points not being allotted.

2. EVALUATION CRITERIA

2.1 This bid will be evaluated according to the criteria and weight given in the table below:

Evaluation Criteria	Points
2.1 Price	80
2.2 B-BBEE in terms of Preferential Procurement Regulations of 2017 (form MBD 6.1)	20
Total points on offer	100

2 QUALIFICATION OF MUNICIPAL VALUER AND/OR ASSISTANT MUNICIPAL VALUER

In terms of Section 39 (1) (a) of the Local Government: Municipal Property Rates Act No. 6 of 2004 only a person registered as a Professional Valuer or Professional Associated Valuer in terms of the Property Valuers Profession Act, 47 (Act No. 47 of 2000) may be designated as the Municipal Valuer.

The Bidder must nominate the person to be designated as the Municipal Valuer by completing **Schedule 1**.

Where the municipality requires the services of a municipal valuer, the successful bidder shall be entitled to nominate an assistant municipal valuer under his control and authority. In such cases **Schedule 2** must be completed.

The municipality reserves the right to:

Fully investigate the qualifications, experience and performance of the Bidder(s) nominated person/s in terms of **Schedules 1 and 2** hereof by reference to, but not limited to:

- previous valuation board hearings;
- appeal board hearings;
- arbitration and supreme courts;
- general standing of the nominated persons within the valuation profession;
- Obtaining references from any professional body that the nominated person/s is associated with; and
- Reserve the right to interview the nominated person/s;

The Bidder(s) nominated person/s if appointed by the municipality as either the Municipal Valuer and/or Assistant Municipal Valuer may not cede or assign his appointment to any other valuer unless such cession and/or assignment has been approved in writing by the municipality. Should such person/s for any reason whatsoever no longer be associated or employed by the successful bidder, the municipality reserves the right to cancel this agreement, in addition to any other remedies, and hold the successful bidder and/or appointed Municipal Valuer liable for any damages it may suffer as a result thereof.

The municipality shall not be obliged to approve any request for cession and/or assignment.

The nominated and designated Municipal Valuer and/or Assistant Municipal Valuer will be responsible for the full compliance of the functions and duties of the valuer as set out in the Act as well as fulfilling all the requirements of this bid.

The Municipal Valuer and/or Assistant Municipal Valuer do by their signature of **Schedule 1 and 2** bind themselves jointly and severally to fulfil all terms and conditions of this bid together with all schedules.

The Municipal Valuer and/or Assistant Municipal Valuer will be required upon appointment, to comply with section 43 (1) (c) with the Code of Conduct set out in **Schedule 2** of the Municipal Systems Act 2000 (Act No. 32 of 2000)

3. SERVICES REQUIRED

Bids are invited from experienced and suitably qualified Bidder(s) to compile and maintain supplementary valuation ROLL.

Bidder(s) will be required to compile Supplementary Valuation ROLL with separate values for land and buildings, for the period from the date of contract until **30 June 2023**.

In addition to compiling the said valuation ROLL, the successful bidder's nominated person/s will be required to assist the municipality in:-

1. The preparation/review of the municipal rates policy in terms of the Act with regard to valuation matters.
2. Community Participation and Public Awareness relating to the valuation and objection process.
3. Attending to valuation enquiries on behalf of the municipality.
4. Assist with the reconciliation of General Valuation Roll, to the Deed Registry and Billing system as per Circular 93 MFMA Act 56 of 2003.

The successful bidder's nominated person/s will be required to undertake the following functions and/or services:-

- (1) Valuation of different categories of properties in terms of Section 8 of the Act.
- (2) Valuation of multiple purpose properties in terms of Section (9) of the Act and the review thereof, if so required by municipality.
- (3) Compile valuations in terms of Section 7 of the Act and subject to the provisions of Section 30(2) of the Act, where applicable.
- (4) Compliance with the provisions of Section 30 of the Act.
- (5) Compile the valuation ROLL as at date of valuation in terms of Section 31 of the Act.
- (6) Comply fully with Section 34 of the Act - Functions of Municipal Valuer.
- (7) Assume responsibility for the performance of Data Collectors appointed in terms of Section 36 of the Act.
- (8) Comply with Section 37 of the Act - Delegation where applicable and if necessary.
- (9) Comply with Section 39 of the Act - Qualifications of Municipal Valuers.
- (10) Comply with Section 40 of the Act - Prescribed Declarations.
- (11) Comply with Section 41 of the Act - Inspection of property within defined days and times.
- (12) Comply with Section 42 of the Act - Access to Information.
- (13) Comply with Section 43 of the Act - Conduct of Valuers.
- (14) Comply with Section 44 of the Act - Protection of Information.

- (15) Comply with Section 45 of the Act - Valuation methodology and Section 13 hereof.
- (16) Comply with Section 46 of the Act - General basis of valuation.
- (17) Comply with Section 47 - Sectional Title Schemes.
- (18) Comply with Section 48 of the Act - Content of valuation Roll including any additional information that the municipality may require in terms of this bid.
- (19) Comply with Section 51 of the Act - Processing of objections, if so required by municipality.
- (20) Comply with Section 52(1)(3) of the Act - Compulsory review.
- (21) Comply with Section 53 of the Act - Notification.
- (22) Comply with Section 69 of the Act - Decision of Valuation Appeal Board and Section 34(f).
- (23) Comply with Section 78 of the Act - Supplementary valuations including annual reviews of multiple properties in terms of Section 9 of the Act and properties affected in terms of Section 15 of the Act, if so required by municipality.
- (24) Comply with Section 81 & 82 of the Act. Bidder(s)/Nominated Person(s) shall provide and make available all data and valuations for purposes of internal monitoring by the municipality as well as monitoring by the MEC for local government in terms of Section 81(1) of the Act and the Minister in terms of Section 82(1) of the Act. Such data will be available in a format that is easy to read, understand and interpret.
- (25) Comply with Section 85- Copyright of valuation ROLL and other data.
All data belongs to the municipality and the municipal manager must ensure that such data is received Prior final payment to the service provider (valuer) and it is adequately protected.
The municipal valuer must submit all data including the valuation Roll in a format wherein the municipality can easily copy and or extract information from such datasets (for example Excel, Access and Word). The pdf version where required must also be submitted. This is to enable the municipality easy use of such information for other purposes. These include assisting in rates tariff modelling when comparing the change in valuations between the two valuation ROLL. These changes in valuations due to a new valuation Roll impacts on changes in rates payable by property owners in each property category.

4. DEFINITIONS

- (a) **Date of Valuation** shall mean the Date of Valuation as determined by municipality in terms of the Act;
- (b) **Date of Draft Submission** shall mean the date upon which the municipality if so required, requires the nominated person to submit data relevant to the valuation Roll to enable the municipality to use such data in the preparation of their rates policy and tariffs;
- (c) **Date of Final Submission** shall mean the date upon which the certified Roll/s are handed to the municipality by the nominated person(s);

(d) **Specialised Properties** shall mean all properties other than residential dwellings, agricultural farming units, and typical income producing properties and include inter alia the following type of properties:

- Shopping Centres eg. De Keur Centre, Ceres Square, etc.
- Hotels
- Conference Centres
- Quarries
- Mines
- Grain Depots
- Private Hospitals
- Provincial and/or State buildings such as Civic Centres, Prisons etc.
- Public service Infrastructure e.g. Railway lines, etc.

The successful bidder shall be required to assist the municipality to compile a register of Specialised Properties that will enable the municipality to easily refer to such properties.

The register will reflect the property description and method of valuation applied. Where generally recognised methods of valuation are not appropriate in the determination of value, for properties of this nature, the nominated person will be required to obtain the written approval from the municipality for the method of valuation or technique of valuation to be applied in the valuation of such properties;

(e) **Data and Information** includes valuations (land and Buildings separate), calculations, spread sheets, data bases, files, maps analysis and systems, whether electronic or hard copy, photographs, field sheets, aerial photographs and/or satellite imagery and/or copies thereof, GIS data, including cadastral and other spatial data, deeds records, sale and rental records and/or any other information that is obtained and used in the fulfilment of this bid;

(f) **Data Ownership** means all data obtained, collected and/or utilised in the compilation and maintenance of the valuation Roll and supplementary valuations ROLL will be the property of the municipality;

(g) **Data Transfer** means all data utilised and/or collected by the successful bidder including that of the data capturers, will be transferred by the to the municipality on a monthly basis and in a format mutually agreed upon. Wherever possible, all data should be collected and transferred in a recognised electronic format.

(h) **Property Master File** is defined as a property master file containing all property records of the municipality relating to the valuation Roll whether registered or not at date of valuation. The successful bidder will be required to record changes and maintain the property master file on an on-going basis after creation thereof. The total number of valuation entries contained in the master file may vary from the number of entries appearing in the valuation Roll. The Property Master File will include properties forming part of the township owner's interest account whether registered or not. The master file will also include the entries of agricultural holdings excised into farms, farms proclaimed into townships and even consolidated.

Upon proclamation of a township, the successful bidder will create the individual entries of all erven of that township in the master file. Bidder shall thereafter administer the township owner's interest account on an ongoing basis as and when entries comprising that township are registered. Unregistered subdivisions will be handled in the same manner as township owner interest accounts.

The purpose of the master file is to enable the public and officials of the municipality to have easy access to all properties registered or unregistered, forming part of either the master file and/or the valuation ROLL of the municipality. The master file and/or valuation ROLL will cross reference all entries that are no longer live deed office entries to their new counterparts appearing in the master file and/or valuation Roll.

Where such information appears in the current valuation Roll, it will be transferred to the new valuation Roll. It will not be necessary to obtain historic information relating to unregistered entries, other than those appearing on the current valuation Roll. All new unregistered entries are to be recorded on either the master file and/or the valuation ROLL. All consolidations, excisions, notarial ties, township proclamations etc which result in unregistered records being created will be recorded from date of commencement of this bid and shall continue for the full duration hereof.

Example: Erf 14 & 15 Dunswart consolidated into Erf 300. Under erven 14 + 15 they will be indicated as unregistered with a cross reference to Erf 300. Under Erf 300 it will be cross-referenced to indicate consolidation of Erf 14 & 15. Holding 16 Ravenswood Agricultural Holdings excised into Portion 315 of the Farm Klipfontein 83 I.R. Under Holding 16 it will be referred to as unregistered and under Portion 315 it will cross-refer as 'previously Holding 16 Ravenswood Agricultural Holding';

1. PROMOTION OF ACCESS TO INFORMATION ACT, ACT 2 OF 2000

The successful bidder will be required to fully comply with the requirements of the Promotion of Access to Information Act, Act 2 of 2000.

In terms of the Promotion of Access to Information Act, Act 2 of 2000, municipality is obliged and compelled to provide certain information to the general public.

Accordingly, successful bidder will be required to compile a manual as required in terms of Section 51 of the Promotion of Access to Information Act, Act 2 of 2000 and that such manual will be attached to the bid document.

The successful bidder will not be required to provide information obtained in terms of Section 42 of the Act that is of a confidential nature, unless required to do so in terms of Section 44 of the said Act.

This directive should if possible be incorporated in the manual submitted in terms of the Promotion of Access to Information Act, Act 2 of 2000.

The successful bidder will however be required to supply any information that is of a general nature appearing in the valuation ROLL and available to the public in the format prescribed by the municipality and against payment if so required.

Confidential Information is to be considered as information specific to a property and unique thereto where such information is not available to the general public. Examples include, but not limited to rentals, details of leases, purchase and sale of member's interest in a close corporation, sale of shares in a company owning property, turnover clauses etc.

Such information may only be disclosed in terms of Section 44 of the Act.

2. CONFIDENTIALITY

In the process of collecting data and information in terms of section 42 of the Act, the successful bidder will have access to sensitive and confidential information. All data accessed, obtained or collected by the successful bidder and/or data collectors must at all times be kept confidential and not be disclosed. The successful bidder will comply in full with the provisions of section 44 of the Act.

In addition, data may not be used for personal gain by the successful bidder or the bidder's business, any employee, sub-contractor or any agent of the successful bidder or any other person, body or organization receiving the information or data through the successful bidder, or any of their employees or agents.

Failure to observe these conditions will constitute a breach of contract, which could result in termination of this contract.

3. PENALTIES AND DEFAULTS

It is a specific condition of this bid that the successful bidder is required to perform his task to acceptable standards and shall be obliged to meet the deadlines determined by the municipality.

If the successful bidder does not conform to the standards as required by the municipality which are contained in this bid document, the successful bidder shall be given **30** days written notice to remedy such default failing which, the municipality will be allowed to cancel this contract in terms of the General Conditions of Contract (July 2010).

Serious default of this contract shall include but not be limited to:

- Non-compliance to submission dates;
- Breach of confidentiality and/or conflict of interest;
- Inadequate valuation performance in terms of sections 51 and 52 of the Act and/or the results of any Valuation Appeal Board arising from this bid;
- Inadequate valuation results measured against monitoring;
- Non-compliance with the Act and any other conditions referred to in this bid;
- Dishonesty;
- Corruption

The municipality shall in either situation of inadequate valuation performance being suspected by the municipality and/or inadequate valuation results arising from internal monitoring, provincial monitoring or national monitoring, have the right to appoint a registered professional valuer of not less than ten years registration to act as an adjudicator on behalf of the municipality to investigate their suspicion. Such person shall consider the merits of the allegations made by the municipality.

The Nominated Person as well as the Bidder shall be obliged to provide all documentation required by such adjudicator as well as attend all sessions of inquiry and interviews with the said adjudicator. The adjudicator shall, in his findings and deliberations declare whether in his opinion the inadequate performance by the nominated person is a serious default or not. The findings of the adjudicator will be handed to the municipality, the nominated person and Bidder. The municipality shall consider the findings of the adjudicator and shall thereafter take the necessary steps against the nominated person and/or the Bidder. The nominated person and/or Bidder shall have the right to reply in full to any questions, allegations or statements made by the adjudicator. The findings of the adjudicator shall be final and binding on both the Bidder and nominated person.

Should the municipality suffer any losses as a result of the default of Bidder and/or the nominated person/s, the municipality shall further be entitled to recover all costs or damages, resulting from such default as well as the cost of re-appointing alternative valuers and other financial losses suffered by the municipality, as a result of the default of Bidder and/or the nominated person/s.

The municipality shall in addition to any of its other rights to claim damages from the Bidder be entitled to enforce the following penalties:

5. PENALTIES

Should it be apparent to the municipality that after the successful bidder has been advised in writing by the municipality that the successful bidder is in default in complying with the deadlines and that the successful bidder has failed to rectify such default within the amended time limit set by municipality then in such event the municipality shall be entitled to cancel the contract and appoint a substitute bidder. In such event, the successful bidder will supply the municipality with all data collected in his possession and the municipality reserves the right to offset any payment due to the successful bidder against the cost of appointing another person to fulfil the requirements of this bid. If the cause of delay is due to the municipality not supplying the agreed data to the successful bidder, or other delays caused by the municipality themselves, then in such event, the municipality shall not be entitled to enforce this clause.

6. RETENTION N/A

7. INSURANCE

Bidder shall submit proof of Professional Indemnity Insurance relating to the nominated person/s to a minimum value of R 1,000,000.00 and Public Liability Insurance held by the bidder for a minimum value of R 500,000.00. Proof must be submitted within 21 working days after the bid is awarded.

8. VALUATION SUMMARY

The bid requires a valuation Roll to be compiled in terms of section 34 of the Act together and compile supplementary valuation ROLL in terms of the said act.

Please refer to **schedule 3** of the bid document for a summary of the number of entries appearing in the current Valuation Roll.

Bidder(s) shall base their bid on the estimated number of entries. Upon submission of the certified valuation Roll an adjustment based on the actual number of entries as reflected in the Property Master File will be made and compared to the above estimate. The bid price will then be adjusted pro rata on the difference of entries and the price will be calculated on the type of category relating to the entry under item A1 to A10 of **Schedule 3** hereof.

Where a property has been valued in terms of its multiple uses, each multiple use will count as a separate entry in the calculation of final entries and price.

The successful bidder shall provide municipality with documented proof of the total number of entries contained in the property master file and the municipality reserves the right to check, audit and verify such entries.

9. SUPPLEMENTARY VALUATIONS:

Supplementary valuation ROLL will be compiled on an annual basis for the following periods:

1 July 2022 to 30 June 2023

The municipality will require that the successful bidder maintains a register of all supplementary valuations in the course of being compiled by the successful bidder and such register will contain provision for monthly reporting on all outstanding supplementary valuations and the reasons thereof.

The successful bidder will be required to submit a certified supplementary valuation Roll by 01 February 2022 .

All terms, conditions and references applicable to the compilation of the valuation Roll shall be applicable to the compilation of supplementary valuation ROLL.

The cost of compiling supplementary valuation ROLL and the maintenance thereof shall be based on the fees as set out in **Schedule 3** hereof.

The successful bidder shall if required by the municipality as part of the maintenance of the valuation Roll, to annually re-inspect And review the valuations relating specifically to properties subjected to sections 9 & 15 of the Act.

10. OBJECTIONS

The successful bidder must comply with the provisions of sections 51, 52 & 53 of the Act. The cost of complying with the objection process is reflected in **Schedule 3**.

11. APPEALS

The successful bidder must attend all hearings of the valuation appeal board hearings. The costs of attending to the hearings are reflected in **Schedule 3**.

12. DATA COLLECTION AND DATA COLLECTION SYSTEMS

The successful bidder will be fully responsible for obtaining all data necessary for the successful bidder to compile the Valuation Roll and Supplementary Valuation ROLL.

The data collected by the successful bidder must be capable of being checked, audited, verified and monitored.

The municipality will establish or have established whether the standard of data collection is accurate and in accordance with generally accepted valuation standards suggested by either The South African Institute of Valuers, or The South African Council for the Property Valuers Profession and/or any other recognised South African bodies relating to the valuation profession.

If the findings of the municipality and/or the said described bodies indicate that the standard of data collection is not in accordance with the above standards, the municipality will give the successful bidder 30 day written notice setting out their findings and request Bidder to rectify such default, failing which municipality shall be entitled to exercise any remedies at its disposal.

The successful bidder will be given the opportunity to explain to the municipality the differences between the findings of the municipality relating to data randomly checked by them and data supplied to them by the successful bidder. All data collected by the successful bidder in no matter what format is the property of municipality.

The collection of data on behalf of the municipality is critical and vital in the determination of true and accurate municipal valuations.

Where the successful bidder has made use of aerial photography and/or satellite imagery at his discretion and/or supplied by him either voluntarily or on behalf of the municipality, such aerial photographs and/or satellite imagery will become the data of the municipality and the successful bidder shall have no lien thereon.

Notwithstanding Section 45(2) (a) of the Act, whereby inspections are optional, the successful bidder will be required to adhere to the following minimum data collection requirements:

The minimum data to be collected for each category of property is as follows:-

13.1 RESIDENTIAL ERVEN AND BUILDINGS

Extent of Erf

Physical address if available

Size of dwelling/s, outbuildings and other structures on the property

Number of storeys

Condition and rating

Quality

Age

Special features i.e. swimming pool, walling
Adverse features i.e. next to informal settlement, busy road, etc.
Topography/slope
View

13.2 SECTIONAL TITLE SCHEMES

Name of scheme
Registration no of scheme
Section number
Section use (residential, garage, store room, shop, office, industrial, etc.)
Door number
Exclusive use area
Erf no (cross referred)
Floor level
Unit type i.e. simplex, duplex, etc.
No of storeys in the scheme
Participation quota
Owner
Sales date
Sales price
Condition of section
Condition of scheme
View
Adverse features
Positive features

13.3 INCOME PRODUCING PROPERTIES

Size of Erf
Street address if available
Rentable or usable area
Gross building area/s
Description of units i.e. 12 x 1 bedroom flats 6 x ground floor shops
Rentals actual and/or estimates provided by agents, tenants, landlords etc.
Expense ratio to gross income
Town planning zoning
Actual use
Surplus developable land
Other income factors e.g. car bays
Turnover contribution if available
Condition rating
Quality of building rating
Owner
Sales date
Sales price
Sales capitalization rates and other information obtained from agents, brokers, purchasers etc.

13.4 SPECIALISED PROPERTIES

Street address if available
Schedule reflecting description and use of buildings.
Size of all buildings
Data relating to specific type of property e.g. number of beds in hospital etc.

13.5 PROPERTIES USED FOR AGRICULTURAL PURPOSES

Land Size

Analysis of land use e.g. Irrigation, dry land, grazing, homestead land etc.

Description of all buildings including use, condition and functionality.

Estimated schedule of building sizes

Investigation of land claims, land tenure etc.

Owner

Sales date

Sales price

13.6 AGRICULTURAL SMALL HOLDINGS

Where used as a farming unit 13.5 will apply

Where used for other purposes 13.1, 13.3 or 13.4 may have to be followed.

13.7 URBAN VACANT LAND

Size

Address (if available)

Topography/slope

Soil conditions

Services

View

Adverse features

Positive features

Owner

Date of sale

Sale price

14. GENERAL

Sales are to be comprehensively inspected and analysed during the compilation and maintenance phase of this tender.

Such analysis is to be fully documented and made available for internal and external monitoring purposes.

In the case of all properties other than agricultural farming units, where aerial photography and/or satellite imagery is not being used a digitised site plan must be submitted.

This requirement will apply to the compilation of the valuation Roll as well as the supplementary valuation ROLL.

Records relating to rentals, vacancies, expense ratios, capitalization rates, construction costs and any other data that will have a bearing on the influence of market value are to be documented, recorded and analysed on an ongoing basis during the duration of this tender.

Sales are to be recorded and distinguished between vacant and improved sales as well as unusable sales.

If building plans are used, they are to be verified and checked against actual buildings erected on the property and the data collected must reflect an "as is" situation found on the site.

Categories of properties as well as multiple purpose properties are to be reflected.

Actual use and town planning zonings are to be reflected. This includes illegal uses.

All data collected will be internally monitored, verified and checked by the Municipality on an ongoing basis.

The municipality does not guarantee the accuracy or correctness of any data supplied to Bidder and it is the responsibility of Bidder to check and correct any such data supplied.

Bidders must satisfy themselves in regard to the number of entries both registered and unregistered forming part of the existing Municipal records.

15. INFORMATION AND SERVICES TO BE PROVIDED BY THE MUNICIPALITY AND/OR BIDDER

15.1 UPON APPOINTMENT, THE MUNICIPALITY WILL PROVIDE THE SUCCESSFUL BIDDER WITH THE FOLLOWING DATA:

- a. Current Valuation Roll;
- b. Copies of all Supplementary Valuation ROLL; and
- c. Other available data (an extract of the municipality's billing system)

15.2. DATA RELATING TO COMPILATION OF THE GENERAL AND SUPPLEMENTARY VALUATION ROLL FUNCTION

	FUNCTION	MUNICIPALITY TO PROVIDE	BIDDER TO PROVIDE / OBTAIN (IF NECESSARY)
1.	Aerial photographs/satellite imagery		X
2.	Building plans where valuation records not available	X	
3.	Valuation records, including site plan with improvements, where not available or completed		X
4.	Bulk deeds download at commencement date		X
5.	Cadastre		X
6.	Development Plan		X
7.	Geographic information system		X
8.	Monthly clearance certificates	X	
9.	Monthly Deeds downloads		X
10.	Monuments and Heritage buildings declared from time to time		X
11.	Occupation Certificates where available	X	
12.	Reports on properties that are adversely affected by adverse soil conditions or prohibition on development i.e. land subject to dolomite etc.		X(If applicable)
13.	Town planning scheme		X

The Municipality will not provide aerial photography and/or satellite imagery and will not refund any costs that a tenderer might incur by obtaining these aids.

The cost of aerial photography and/or satellite imagery must be included in the total tender amount should the bidder choose to make use of such aids.

16. PRINTING AND BINDING OF ROLL

The successful bidder shall be responsible for providing 4 copies of the valuation Roll, one of which will be certified by the successful bidder. The valuation ROLL shall be printed in A3 or A4 format, not back to back, and shall be appropriately indexed.

The valuation Roll shall be spirally bound and each volume shall be numbered and contain a cover and back page. All pages of the valuation Roll shall be consecutively numbered. The printing and binding of the valuation Roll shall be for the account of the successful bidder. In addition, the successful bidder shall provide the municipality with an electronic copy of the valuation Roll and supplementary ROLL in a printable format. Additional copies of the valuation Roll and/or supplementary valuation ROLL will be as indicated in Schedule 3 hereof.

The Successful Bidder shall be responsible for the cost printing and postage of ALL Notices.

17. VALUATION SYSTEM

The successful bidder shall satisfy municipality that its valuation system will adequately be capable of not only producing the valuation ROLL, but also storing historic data necessary in terms of the Promotion of Access to Information Act, Act 2 of 2000. The minimum, requirements of the Valuation System must be as follows:-

If a mass valuation system is used by Bidder, the system must be compatible with the valuation system of the municipality.

The valuation system must be compatible with the management systems that are affected by the valuation process.

The valuation system must be capable to seamlessly integrate with the current financial system of the municipality as per the requirements of mSCOA, as well as future developments to the financial system. The information must be provided in a format that can be imported to the billing system of SAMRAS DB4 as used by the municipality.

The valuation system must have an audit trail and the system must be able to verify all data that has an influence on value-

It must have adequate securities and controls to ensure that critical valuation data cannot be manipulated or corrupted.

In the case of property data

The valuation system must be able to store changes relating to inter alia land use, zonings, size, sub divisions, consolidations, excisions, notarial ties etc.

- Current and previous owners
- Date of sale and transfer
- Sales price
- Title deed numbers
- Servitudes
- Caveats
- Type of sale i.e. vacant or improved

In the case of Valuations

- All current and future valuations Land and Buildings separate
- All changes to valuations to be historically reflected
- Ability to produce monthly supplementary ROLL for auditing and checking purposes

Objections

The valuation system must be capable of recording objections and appeals and must reflect

- Name of objector
- Name of owner
- Objection number
- Reason for objection
- Entry required by objector

- Decision of valuer
- Reasons of valuer
- Decision of appeal board
- Existing valuations and valuations reflected in the valuation Roll
- Adjustments made by the appeal board
- Historic records of all objections lodged in terms of the Act against the property from date of commencement and for the full duration hereof.

Reports

- Sectional Title Scheme register (including related units)
- Coupling properties where more than one property is processed as one.
- Part A and B as required by MPRA.
- Notices and letters to owners, objectors and appellants.
- Valuation, Objection and Appeal ROLL.
- Other MPRA required lists for example the “more than 10%” reviews adjusted.

Other

The valuation System must be capable of storing inter alia:-

Building plan data where used in the valuation process, site plans, aerial photographs and all other pertinent data on a historic basis. Such data must be capable of being linked to each erf in a way that a full history of all data from date of appointment in terms of this bid, pertaining to that erf can be extracted by reference to that erf.

The valuation system must be capable of extracting all properties that are subject to multiple entries, rebates, reductions or exemptions.

Record of Municipal properties to ensure mSCOA compliance.

The valuation system must be able to extract properties on a specific owner type i.e. municipal properties, state owned properties as well as categories of properties in terms of the rates policy of the municipality.

The valuation system must also be able to extract vacant properties and other information that the municipality may require for statistical purposes.

The valuation system must be able to download data directly from the deeds offices as well as recording and linking properties from various databases with the property key number of the Surveyor General.

18. DATA BACK UP AND DISASTER RECOVERY PLAN

All data collected by Bidder is the property of the municipality.

Bidder will be required at all times to fully protect such data against theft, data corruption, data espionage and data loss.

The maintenance and protection of data on behalf of municipality is critical and vital.

Bidder will ensure that all data protected and backed up is capable of being restored and reinstalled into the valuation system of either municipality or Bidder in less than seven working days from date of data disaster.

Where Bidder utilizes data collection methods such as aerial photographs, electronic measurements, GIS etc. such data will also have to be fully protected and capable of restoration in the event of a data disaster. All such data will be made available to municipality in a format specified by municipality.

Municipality reserves the right to appoint either its own officials to assess the data protection and disaster recovery procedure or appoint independent specialists to evaluate and consider the merits and adequacy of the plan as set out below.

18.1 Bidder will comply with the following minimum requirements for data protection and data recovery:

ITEM	DESCRIPTION	COMPLY	
			NO
18.1.1	Bidder will ensure that all data collected manually on paper be scanned into PDF document 'read only' format.		
18.1.2	Bidder shall keep an original copy of the document in conjunction with the document in electronic PDF format stored on magnetic based media		
18.1.3	Bidder shall enforce all other static documents - formats are set as read only and set the relative permissions on GIs and all third party data.		
18.1.4	All data stored on any magnetic based media shall be hosted by an operating system capable of setting security permissions down to the individual file level.		
18.1.5	Bidder will ensure that all scanned documents attributes stored on magnetic based media are filled in accurately and to the requirements requested by the municipality.		
18.1.6	Bidder will ensure that all servers hosting the documents referred to in this paragraph and schedule be protected and accessed at server level by the Bidder(s) appointed network administrator/s only		
18.1.7	Bidder will ensure strong password protection at the administrator level on the servers referred to in this section.		
18.1.8	Bidder(s) will ensure that data which is available to the public and not of a confidential nature is in 'read only format' and the original data or documents cannot be altered in any form whatsoever, whilst hosted on the Bidder's infrastructure or appointed third party service providers infrastructure.		
18.1.9	Bidder will ensure that all metadata stored in custom designed relational database systems, cannot be altered once entered into the database and must be protected by the maximum levels of protection recommended by the manufacturers and as set out in this schedule		
18.1.10	Bidder may make use of approved 'open source' software products available on the market, to build proprietary systems, provided prior approval is obtained from the municipality in writing. All data output from a relational database system will be provided and made available in an approved format to municipality		
18.1.11	Bidder will ensure that all data is backed up on a daily basis and verified.		
18.1.12	Bidder will ensure that 2 sets of media be created and used for backup purposes each set will be used and alternated on a separate weekly basis.		
18.1.13	Bidder will create a fortnightly backup independent of the weekly backups, to be stored off site from the next business day when the backup is completed.		
18.1.14	Bidder will ensure that a monthly backup be enforced on the last business day of the month, this backup set will be removed the next business day and stored off site in a secure facility.		
18.1.15	Bidder will ensure that this backup cycle be enforced for the duration of the bid. bidder will adhere to and implement the backup software vendors 'best practice' specifications		
18.1.16	Bidder will adhere to and comply with the backup hardware manufacturers specifications.		
18.1.17	Bidder will ensure that all backup hardware is serviced regularly; service intervals shall not exceed a period of 120 days between intervals		

Municipality may review and amend this requirement at any time to keep pace with changes in technology and equipment. Should municipality require that a revised basis of back-up be implemented that is substantially different from that contained herein, they will consider a contribution towards the cost of Bidder, implementing such changes.

Municipality reserves the right to authorise and appoint a third party consultant, to check and monitor the data protection methods of Bidder during the duration of this bid.

Bidder shall ensure that the data protection policy implemented by Bidder is within the specifications and requirements of the municipality for the full period of this bid.

In the absence of a data protection policy, annexed to this bidder the following minimum data collection specifications will apply to the appointed Bidder/s.

19. DATA TRANSFER

Bulk data transfer shall be made available to municipality in a format specified by municipality.

Bidder will ensure that a minimum of LTO 2 Tape Backup technology or equivalent is utilised on a daily basis.

Municipality may request these tapes/media from time to time to verify and ensure data integrity.

Bidder may utilise optical based media technology for archiving purposes.

Bidder may utilise optical based media technology for data presentation.

Bidder will ensure that all optical based media be 'read only'.

Bidder will ensure secure site protocols are enforced for all website/internet available data.

Bidder will ensure that all data collected be transferred to municipality on a minimum of a fortnightly basis.

Bidder will ensure that he fully acquaints himself with the amount of data to be stored and what data needs to be protected and satisfies the municipality or its duly appointed consultant that the Bidder has an adequate Computer System to fully comply with the needs of paragraph 19 hereof as well as any other computer needs of the Bidder.

20. SPECIFICATIONS OF AERIAL PHOTOGRAPHY REQUIRED FOR DATA COLLECTION

DESCRIPTION	SPECIFICATION	
	URBAN	RURAL
Colour	Panchromatic will be sufficient.	Panchromatic will be sufficient.
Scale of negatives	1:10 000	n.a
Off-nadir angle	0°-15°	
Digital format	Tiff or Mr Sid with applicable word file (*.tffw or *.sidw)	
Protection	Transverse Mercator 29° East	
Datum	WGS84	
Accuracy	<=1m	5m to 15m
Resolution	<=0.25m	0.50m to 1.25m
Ground Control	Yes	No
Ortho rectification	Yes	Yes
Mosaicing	Yes	Yes
Geo-referencing	Yes	Yes
Collection method	Aerial photography	Aerial photography or satellite imagery
Application	Suitable for capturing footprints of buildings and structures as well as broad land use	Suitable for capturing broad land uses and identify position and approximate size of buildings and structures
Cloud Cover	5%	

SCHEDULE 1 (A)

AFFIDAVIT, NOMINATION AND DECLARATION OF MUNICIPAL VALUER

The Bidder hereby nominates the following person to be designated by the municipality in terms of section 33 (1) as the municipal valuer

FULL NAMES

I.D. NUMBER

PROFESSIONAL QUALIFICATIONS

PROFESSIONAL REGISTRATION NO
(Attach certified copy of certificate)

Have you ever been disqualified as a valuer? If yes, full details and reasons to be supplied.

.....

.....

Have you been summoned to appear at any disciplinary hearing of either the South African Institute of Valuers and/or South African Council for the Property Valuers Profession or other recognised professional bodies relating to the valuation profession? If yes, full details including date of hearing, presiding officer and outcome.

WORK EXPERIENCE IN COMPILING MASS MUNICIPAL VALUATIONS:

NAME OF MUNICIPALITY	PERIOD OF VALUATION ROLL	NO. OF PROPERTIES ON ROLL	REFERENCE	CONTACT NUMBER

List properties included in any of the valuation ROLL compiled by you of a special nature/requiring specific skills, i.e. airport, mines, quarries, etc.

DESCRIPTION OF PROPERTY	TYPE OF PROPERTY	METHOD OF VALUATION	MUNICIPALITY

Have you compiled any valuation ROLL utilizing GIS and/or Aerial Photography? If yes, provide full details:

NAME OF MUNICIPALITY	DATE OF VALUATION ROLL	CONTACT PERSON	PHONE NO

Have you had any experience in reconciling cadastre data with deeds data and thereafter with the municipal valuation Roll? If yes, provide full details.

Have you had any experience in reconciling cadastre data with deed data and thereafter with the municipal valuation Roll? If yes, provide full details.

NAME OF MUNICIPALITY	DATE OF VALUATION ROLL	CONTACT PERSON	PHONE NO

VALUATION BOARD HEARING EXPERIENCE

Have you appeared in front of any valuation boards in terms of previous legislation?

If yes:

NAME OF MUNICIPALITY	NAME OF CHAIRPERSON	NAME OF SECRETARY	DATE OF HEARING

VALUATION APPEAL BOARD HEARINGS

Have you appeared in front of a Valuation Appeal Board in terms of previous legislation or the Act?

If yes:

NAME OF MUNICIPALITY	NAME OF CHAIRPERSON	NAME OF SECRETARY	DATE OF HEARING	No of appeals	No of appeals upheld by the board	What was the % reduction awarded by the board compared to the valuations compiled by you?

I, The undersigned _____

do hereby make oath and say that :

The questionnaire has been completed by me in full.

I have not withheld any information in regards the completion of this questionnaire and that all information supplied by me is true and correct.

I do further declare that I have read all the bid requirements including all schedules, forms and other information set out and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

I further undertake by my signature hereof (if I am not the Bidder) to bind myself jointly and severally with Bidder to fulfil all obligations and requirements of this bid.

Signed by me at _____ this _____ day 20 _____

SIGNATURE: NOMINATED PERSON AS
MUNICIPAL VALUER

JUSTICE OF PEACE/COMMISSIONER OF OATHS

I hereby certify that the deponent has acknowledged that he/she knows and understands the contents of this affidavit and that it was signed and sworn to before me at _____ on theday of 20_____

Justice of Peace/Commissioner of Oaths

TO BE STAMPED BY JUSTICE OF
PEACE/COMMISSIONER OF OATHS

SCHEDULE 1 (B)

**AFFIDAVIT, NOMINATION AND DECLARATION OF
SUBSTITUTE MUNICIPAL VALUER**

In the event of the nominated person as municipal valuer, not being able to carry out his functions and/or duties in terms of this bid due to accident, death, ill health or insolvency, the person nominated as the substitute municipal valuer shall continue with the functions of the Municipal valuer and shall assume all responsibilities in terms hereof as if he were the Municipal valuer.

FULL NAMES

I.D. NUMBER

PROFESSIONAL QUALIFICATIONS

**PROFESSIONAL REGISTRATION NO
(Attach certified copy of certificate)**

Have you ever been disqualified as a valuer? If yes, full details and reasons to be supplied.

.....

.....

Have you been summoned to appear at any disciplinary hearing of either the South African Institute of Valuers and/or South African Council for the Property Valuers Profession or other recognised professional bodies relating to the valuation profession? If yes, full details including date of hearing, presiding officer and outcome.

.....

.....

WORK EXPERIENCE IN COMPILING MASS MUNICIPAL VALUATIONS:

NAME OF MUNICIPALITY	PERIOD OF VALUATION ROLL	NO. OF PROPERTIES ON ROLL	REFERENCE	CONTACT NUMBER

List properties included in any of the valuation ROLL compiled by you of a special nature/requiring specific skills, i.e. airport, mines, quarries, etc.

DESCRIPTION OF PROPERTY	TYPE OF PROPERTY	METHOD OF VALUATION	MUNICIPALITY

Have you compiled any valuation ROLL utilizing GIS and/or Aerial Photography? If yes, provide full details:

NAME OF MUNICIPALITY	DATE OF VALUATION ROLL	CONTACT PERSON	PHONE NO

Have you had any experience in reconciling cadastre data with deeds data and thereafter with the municipal valuation Roll? If yes, provide full details.

NAME OF MUNICIPALITY	DATE OF VALUATION ROLL	CONTACT PERSON	PHONE NO

VALUATION BOARD HEARING EXPERIENCE

Have you appeared in front of any valuation boards in terms of previous legislation?

If yes:

NAME OF MUNICIPALITY	NAME OF CHAIRPERSON	NAME OF SECRETARY	DATE OF HEARING

VALUATION APPEAL BOARD HEARINGS

Have you appeared in front of a Valuation Appeal Board in terms of previous legislation or the Act?

If yes:

NAME OF MUNICIPALITY	NAME OF CHAIRPERSON	NAME OF SECRETARY	DATE OF HEARING	No of appeals	No of appeals upheld by the board	What was the % reduction awarded by the board compared to the valuations compiled by you?

I, The undersigned _____

do hereby make oath and say that :

The questionnaire has been completed by me in full.

I have not withheld any information in regards the completion of this questionnaire and that all information supplied by me is true and correct.

I do further declare that I have read all the bid requirements including all schedules, forms and other information set out and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

I further undertake by my signature hereof that in the event of the nominated Municipal valuer in terms of **Schedule 1(A)** hereof not being able to carry out his duties as a result of accident, death, ill health or insolvency, I hereby bind myself jointly and severally with Bidder and/or the Municipal valuer to fulfil all obligations and requirements of this bid. I do further declare that I have read all the bid requirements including all schedules, forms and other information set out and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

Signed by me at _____ this _____ day _____ 20____

SIGNATURE: NOMINATED PERSON AS
SUBSTITUTE MUNICIPAL VALUER

JUSTICE OF PEACE/COMMISSIONER OF OATHS

I hereby certify that the deponent has acknowledged that he/she knows and understands the contents of this affidavit and that it was signed and sworn to before me at on theday of20_____

Justice of Peace/Commissioner of Oaths

TO BE STAMPED BY JUSTICE OF
PEACE/COMMISSIONER OF OATHS

SCHEDULE 2

AFFIDAVIT, NOMINATION AND DECLARATION OF ASSISTANT MUNICIPAL VALUER

In the case of nomination for assistant municipal valuer a minimum of two persons must be nominated. This is necessary to provide for succession in the event of one of the nominated assistant municipal valuers not being able to perform his duties as a result of accident, death, ill health or insolvency provided that they accept the appointment jointly and severally.

FULL NAMES

I.D. NUMBER

PROFESSIONAL QUALIFICATIONS

PROFESSIONAL REGISTRATION NO

(Attach certified copy of certificate

Have you ever been disqualified as a valuer? If yes, full details and reasons to be supplied.

.....

.....

Have you been summoned to appear at any disciplinary hearing of either the South African Institute of Valuers and/or South African Council for the Property Valuers Profession or other recognised professional bodies relating to the valuation profession? If yes, full details including date of hearing, presiding officer and outcome.

.....

.....

WORK EXPERIENCE IN COMPILING MASS MUNICIPAL VALUATIONS:

NAME OF MUNICIPALITY	PERIOD OF VALUATION ROLL	NO. OF PROPERTIES ON ROLL	REFERENCE	CONTACT NUMBER

Have you had any experience in reconciling cadastre data with deeds data and thereafter with the municipal valuation Roll? If yes, provide full details.

NAME OF MUNICIPALITY	DATE OF VALUATION ROLL	CONTACT PERSON	PHONE NO

VALUATION BOARD HEARING EXPERIENCE

Have you appeared in front of any valuation boards in terms of previous legislation?

If yes:

NAME OF MUNICIPALITY	NAME OF CHAIRPERSON	NAME OF SECRETARY	DATE OF HEARING

VALUATION APPEAL BOARD HEARINGS

Have you appeared in fort of a Valuation Appeal Board in terms of previous legislation or the Act?

If yes:

NAME OF MUNICIPALITY	NAME OF CHAIRPERSON	NAME OF SECRETARY	DATE OF HEARING	No of appeals	No of appeals upheld by the board	What was the % Reduction awarded by the board compared to the valuations compiled by you?

I, The undersigned _____

do hereby make oath and say that :

The questionnaire has been completed by me in full.

I have not withheld any information in regards the completion of this questionnaire and that all information supplied by me is true and correct.

I do further declare that I have read all the bid requirements including all schedules, forms and other information set out and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

I further undertake by my signature hereof (if I am not the Bidder) to bind myself jointly and severally with Bidder to fulfil all obligations and requirements of this bid.

Signed by me at _____ this _____ day _____ 20 _____

SIGNATURE: NOMINATED PERSON AS
MUNICIPAL VALUER NO 1

JUSTICE OF PEACE/COMMISSIONER OF OATHS

I hereby certify that the deponent has acknowledged that he/she knows and understands the contents of this affidavit and that it was signed and sworn to before me at on theday of20_____

Justice of Peace/Commissioner of Oaths

TO BE STAMPED BY JUSTICE OF
PEACE/COMMISSIONER OF OATHS

SCHEDULE 4

DATA BACK UP AND DISASTER RECOVERY PLAN

All data collected by Bidder is the property of the municipality.

Bidder will be required at all times to fully protect such data against theft, data corruption, data espionage and data loss.

The maintenance and protection of data on behalf of municipality is critical and vital.

Bidder will ensure that all data protected and backed up is capable of being restored and reinstalled into the supplementary valuation system of either municipality or Bidder in less than seven working days from date of data disaster.

Where Bidder utilizes data collection methods such as aerial photographs, electronic measurements, GIS etc. such data will also have to be fully protected and capable of restoration in the event of a data disaster. All such data will be made available to municipality in a format specified by municipality.

Municipality reserves the right to appoint either its own officials to assess the data protection and disaster recovery procedure or appoint independent specialists to evaluate and consider the merits and adequacy of the plan as set out below.

ITEM	DESCRIPTION	COMPLY	
		YES	NO
1.	Bidder will ensure that all data collected manually on paper be scanned into PDF document 'read only' format.		
2.	Bidder shall keep an original copy of the document in conjunction with the document in electronic PDF format stored on magnetic based media		
3.	Bidder shall enforce all other static documents - formats are set as read only and set the relative permissions on GIs and all third party data.		
4.	All data stored on any magnetic based media shall be hosted by an operating system capable of setting security permissions down to the individual file level.		
5.	Bidder will ensure that all scanned documents attributes stored on magnetic based media are filled in accurately and to the requirements requested by the municipality.		
6.	Bidder will ensure that all servers hosting the documents referred to in this paragraph and schedule be protected and accessed at server level by the Bidder(s) appointed network administrator/s only		
7.	Bidder will ensure strong password protection at the administrator level on the servers referred to in this section.		
8.	Bidder(s) will ensure that data which is available to the public and not of a confidential nature is in 'read only format' and the original data or documents cannot be altered in any form whatsoever, whilst hosted on the Bidder's infrastructure or appointed third party service providers infrastructure.		
9.	Bidder will ensure that all metadata stored in custom designed relational database systems, cannot be altered once entered into the database and must be protected by the maximum levels of protection recommended by the manufacturers and as set out in this schedule		
10.	Bidder may make use of approved 'open source' software products available on the market, to build proprietary systems, provided prior approval is obtained from the municipality in writing. All data output from a relational database system will be provided and made available in an approved format to municipality		
11.	Bidder will ensure that all data is backed up on a daily basis and verified.		
12.	Bidder will ensure that 2 sets of media be created and used for backup purposes each set will be used and alternated on a separate weekly basis.		
13.	Bidder will create a fortnightly backup independent of the weekly backups, to be stored off site from the next business day when the backup is completed.		
14.	Bidder will ensure that a monthly backup be enforced on the last business day of the month, this backup set will be removed the next business day and stored off site in a secure facility.		
ITEM	DESCRIPTION	COMPLY	
		YES	NO
15.	Bidder will ensure that this backup cycle be enforced for the duration of the bid. bidder will adhere to and implement the backup software vendors 'best practice' specifications		
16.	Bidder will adhere to and comply with the backup hardware manufacturers specifications.		
17.	Bidder will ensure that all backup hardware is serviced regularly; service intervals shall not exceed a period of 120 days between intervals		

SCHEDULE 5

PROJECT WORK PLAN

Attach as a comprehensive work plan reflecting inter-alia:-

- Work definition
- Work flow
- Timelines
- Deadlines

Note the above schedule will become the basis upon which the municipality will monitor the Tenderer(s) progress and the municipality shall be entitled to take action against the Tenderer if the above time limits and project plan are not adhered to. Municipality reserves the right to review the time frames indicated by the Tenderer and enforce such time frames or deadlines.

Tenderer to include hereunder a work flow diagram or chart illustrating his understanding of the entire valuation process necessary to compile the valuations referred to in this tender

The Bidder hereby confirms that the information given above is true and correct and certifies that all of the above is understood.

.....
(Name in Print)

.....
(Signature)

.....
(Capacity)

.....
(Date)

SCHEDULE 6

PROOF OF INSURANCE COMPLIANCE

Attached as **Schedule 6** proof in terms of paragraph 7.

SCHEDULE 7

PROMOTION OF ACCESS TO INFORMATION ACT, ACT 2 OF 2000

Attach an original or certified copy of the manual submitted in terms of the above Act here:-

**SCHEDULE 8
COMPUTER SYSTEM**

The Tenderer must complete the table below by answering yes/no and having the nominated person initial in the applicable columns, next to the statements, indicating that the statements will be adhered to.

The Tenderer must also attach a detailed inventory of the current computer equipment owned by him as well as future computer needs necessary to comply with this tender.

The Tenderer may appoint a specialist to assist him to meet the computer and IT requirements to comply with this tender.

	Statement	Yes/No	Initial
1.	The Valuation System is compatible with the financial management system of the Municipality(SAMRAS- DB4-)		
2.	The Valuation system has and Audit Trail and is able to verify all data that has an influence on values.		
3.	The Valuation System has adequate securities and controls to ensure that critical valuation data cannot be manipulated or corrupted.		
4.	The Valuation System is capable of recording objections and appeals. The Valuation System is able to reflect:		
4.1	Name of the objector.		
4.2	Name of the owner.		
4.3	Objection number.		
4.4	Entry required by objector.		
4.5	Decision of valuer.		
4.6	Reasons of valuer.		
4.7	Decision of Valuation Appeal Board.		
4.8	Historic records of all objections lodged in terms of the Act against the property from date of commencement and for the full duration thereof.		
4.9	Historic record of valuation values.		
5.	The Valuation System is able to store building plan data linked to each erf and can show a full history of this stored data from contract date.		
6.	The Valuation System must be able to extract reports on property data e.g. all the vacant properties.		

SCHEDULE 9

HUMAN RESOURCES

Tenderer and/or nominated person/s to complete the following schedule:

Schedule 8 must be accompanied by a human resources organogram of Tenderer and nominated person/s

NAME OF PERSON	EXPERIENCE	YEARS OF EXPERIENCE	FULL TIME OR PART TIME ON PROJECT	PROFESSIONAL QUALIFICATIONS

SCHEDULE 10

DOCUMENTS OF REGISTRATION AS A PROFESSIONAL VALUER OR PROFESSIONAL ASSOCIATED VALUER

The Bidder must attach to this application a **certified** copy of the registration as a Professional Valuer or Professional Associated Valuer in terms of the Property Valuers Profession Act, 47 (Act No. 47 of 2000

DETAILS OF BIDDER (THE FOLLOWING PARTICULARS MUST BE FURNISHED. FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)

Name of firm / entity / enterprise	
Trading as (if different from above)	
Postal address of enterprise	Line 1 : _____ Line 2: _____ Town/city _____ Postal code: _____
Physical address of enterprise	Line 1 : _____ Line 2: _____ Town/city _____ Postal code: _____
Contact details of the person signing the bid, being duly authorised to do so:	Name: _____ Telephone: _____ Fax: _____ Cellular telephone: _____ E-mail address: _____
Contact details of the senior manager responsible for overseeing contract performance:	Name: _____ Telephone: _____ Fax: _____ Cellular telephone: _____ E-mail address: _____
Contact Details of the Bidder's proposed Project Manager who will represent the Bidder in the implementation processes:	Name: _____ Telephone: _____ Fax: _____ Cellular telephone: _____ E-mail address: _____
Company income tax number	
Tax Compliance Status System PIN (issued by SARS)	
VAT registration number	
Company registration number	
Any other Registration applicable to this Industry	
Banking details	Name of account holder: _____ Name of bank: _____ Account number: _____ Branch code: _____

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE WITZENBERG MUNICIPALITY					
BID NUMBER:	08/2/20/37	CLOSING DATE:	14 November 2022	CLOSING TIME:	10:00
DESCRIPTION	SERVICE PROVIDER FOR COMPILATION AND MAINTENANCE OF SUPPLEMENTARY VALUATION ROLL				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).					

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes <input type="checkbox"/> No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3]	
TOTAL NUMBER OF ITEMS OFFERED			TOTAL BID PRICE	R	
SIGNATURE OF BIDDER		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL INFORMATION MAY BE DIRECTED TO:		
DEPARTMENT	Supply Chain		CONTACT PERSON	Ms C Stevens	
CONTACT PERSON	Ms Shayle Mentor		TELEPHONE NUMBER	023 316 1854	
TELEPHONE NUMBER	023 312 1761 / 5		FACSIMILE NUMBER	023 316 1877	
FACSIMILE NUMBER	023 312 1934		E-MAIL ADDRESS	carmen@witzenberg.gov.za	
E-MAIL ADDRESS	supplychain@witzenberg.gov.za				

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE</p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3.</p> <p>2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS
<p>3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.</p>

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.
NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.**

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

DATE:

**PRICING SCHEDULE – FIRM
PRICES (PURCHASES)**

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON- FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

Name of Bidder:	Bid Number: 08/2/20/37
Closing Time: 10:00	Closing Date: 14 November 2022

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

SUPPLEMENTARY VALUATION			
DESCRIPTION	Quantities for evaluation purposes	Rate per entry incl. VAT (R) B	Total (Inc. VAT) (R) C = A x B
	A		C = A x B
Residential	250		
Business, industrial etc	10		
Municipal Properties	5		
State Properties	1		
Vacant	15		
Farms used for farming purpose	10		
Farms used for purposes other than farming	10		
Section 51 Compliance (Price per objection)	10		
Section 53 Compliance (Price Per Notification)	10		
Attendance of Professional Valuer at Appeal Board hearing (Price per day)	2		
Total Supplementary Valuation:			R

Note: Bidders must quote on all items in the pricing schedule. The quantities as indicated in the pricing schedule are only estimated quantities which will be used in order to evaluate the bid although the actual number is not limited to the estimated number of units but rather for the contract period. Bid prices must be fixed for the contract period. Bidders MUST tender for every item in each line and column of the pricing schedule. Should any tenderer fail to tender as stated above, your tender will be disqualified. This tender will be awarded to one bidder.

All valuations must have a valid geo-referenced photo attached. The costs hereof must be included in the pricing schedules. Total bid price must include travelling and incidental expenses for the contract period.

- Required by: Ms C Stevens
- At: 50 Voortrekker Street, Ceres
- Does offer comply with specification? *YES/ NO
- If not to specification, indicate deviation(s)

- *Delivery: Firm
- Period required for delivery

Note: All delivery costs must be included in the bid price and delivered to the prescribed destination.

VALUE ADDED TAX

The following forms part of the General Conditions of Contract (July 2010):

Where the value of an intended contract will exceed R1 000 000.00 (R1 million) it is the bidder's responsibility to be registered with the South African Revenue Service (SARS) for VAT purposes in order to be able to issue tax invoices.

It is a requirement of this contract that the amount of value-added tax (VAT) must be shown clearly on each invoice.

The amended Value- Added Tax Act requires that a Tax Invoice for supplies in excess of R3 000.00 should, in addition to the other required information, also disclose the VAT registration number of the recipient, with effect from 1 March 2005.

The VAT registration number of the Witzenberg Municipality is **4000-846-206**

DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state¹.
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 of bidder or his or her representative:.....

3.2 Identity Number:

3.3 Position occupied in the Company (director, trustee, shareholder²):.....

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**

3.8.1 If yes, furnish particulars.

.....

3.9 Have you been in the service of the state for the past twelve months? **YES** / **NO**

3.9.1 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**

3.10.1 If yes, furnish particulars.

.....

¹MSCM 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.

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.

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**

3.11.1 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**

3.12.1 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**

3.13.1 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 business whether or not they are bidding for this contract. **YES** / **NO**

3.14.1 If yes, furnish particulars:

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

Full Name	Identity Number	Personal income tax reference number	State Employee Number

.....
Signature

.....
Date

.....
Capacity

.....
Name of Bidder

RESPONSIVENESS AND EVALUATION CRITERIA

NB: Witzenberg Municipality may verify any information submitted in terms of this proposal and any information that is incorrect may result in that Bid being automatically disqualified and not considered further.

RESPONSIVENESS CRITERIA

No bid will be considered by Witzenberg Municipality unless it meets the following responsiveness criteria (for the bid to be considered responsive, the bid **must** meet the following requirements):

- a) The bid must be properly received in a sealed envelope which must clearly indicate the description of the service and the bid number on the outside of the sealed envelope for which the bid is submitted.
- b) The bid 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 the bid. **Telephonic, facsimile, electronic/mailed and late bids will not be accepted.**
- c) Bidders must provide a valid Tax Verification Details (Tax reference number and valid third party verification pin) as issued by SARS in order to confirm their tax compliance status. Failure to provide such details may result in your bid being disqualified.
- d) An original or certified copy of the bidder's Broad-Based Black Economic Empowerment (B-BBEE) certificate must be attached to this bid document in order to claim B-BBEE points.
- e) The official bid document must be fully completed in indelible ink. Where information requested does not apply to the bidder and the space is left blank, it will be deemed to be not applicable.
- f) All requested relevant and/or additional documentation such as Compliance Certificates, professional registration, artisan qualification, etc, must be submitted with the bid document.
- g) Bidders must submit a certified statement signed by the bidder declaring that the bidder has no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is overdue for more than 30 days (Annexure A).
- h) The bidder must be in good standing to do business with the public sector in terms of Regulation 38 of the Supply Chain Management Regulations (Government Gazette 27636 of 30 May 2005).
- i) **Please note that any suspicious collusive bidding behaviour and restrictive practices by bidders will be reported to the Competition Commission for investigation and possible imposition of administrative penalties.**
- j) If the entity submitting a bid is a Joint Venture or Consortium or Partnership, each party to that formation must submit all the above information.
- k) The bidder must adhere to the Pricing Instructions. **Delivery costs must be included in the bid price and delivered to the prescribed destination.** Bidders are required to bid for all items in the pricing schedule. Failure to do so will deem the bid to be non-responsive. The quantities as indicated above in the pricing schedule are only estimated quantities, based on historical data, and will be used in order to evaluate the bid. This does not in any way guarantee the quantities required.

I) **Arithmetical Errors, Omissions and Discrepancies**

1. Check responsive tenders for discrepancies between amounts in words and amounts in figures. Where there is a discrepancy between the amounts in figures and the amount in words, the amount in words shall govern
2. Check the highest ranked tender or tenderer with the highest number of tender evaluation points after the evaluation of tender offers
 - a) the gross misplacement of the decimal point in any unit rate;
 - b) omissions made in completing the pricing schedule or bills of quantities; or
 - c) arithmetic errors in:
 - (i) line item totals resulting from the product of a unit rate and a quantity in bills of quantities or schedules of prices; or
 - (ii) the summation of the prices.
3. Notify the tenderer of all errors or omissions that are identified in the tender offer and either confirm the tender offer as tendered or accept the corrected total of prices.
4. Where the tenderer elects to confirm the tender offer as tendered, correct the errors as follows:
 - (a) If bills of quantities or pricing schedules apply and there is an error in the line item total resulting from the product of the unit rate and the quantity, the line item total shall govern and the rate shall be corrected. Where there is an obviously gross misplacement of the decimal point in the unit rate, the line item total as quoted shall govern, and the unit rate shall be corrected.
 - (b) Where there is an error in the total of the prices either as a result of other corrections required by this checking process or in the tenderer's addition of prices, the total of the prices shall govern and the tenderer will be asked to revise selected item prices (and their rates if bills of quantities apply) to achieve the tendered total of the prices.

The tender offer will be rejected if the tenderer does not correct or accept the correction of the arithmetical error in the manner described above.

- m) The Bidder's details must be provided.
- n) The necessary document authorising the Representative to sign and submit the bid on the bidder's behalf must be completed and signed.
- o) The Declaration of Interests by the bidder must be completed and signed.
- p) The bid must comply with all the minimum technical specifications.
- q) The MBD 9 (prohibition of restrictive practices) must be completed and signed.
- r) Checklist at the back of the bid document must be completed and adhered to.

EVALUATION OF BIDS

- a) All bids received shall be evaluated in terms of the Witzenberg Municipality SCM Policy, Supply Chain Management Regulation, the Preferential Procurement Policy Framework Act no 5 of 2000 and the Preferential Procurement Regulations of 2017 that was promulgated by the Minister of Finance on 20 January 2017 in Government Gazette No 40553.
- b) The Council reserves the right to accept all, some, or none of the bids submitted — either wholly or in part — and it is not obligated to accept the lowest bid.
- c) The municipality may accept any offer notwithstanding the fact that the offer does not comply with the bid invitation in respect of which the offer has been made subject to the following:

AREAS TO BE INCLUDED IN EVALUATION PROCESS:

Evaluation of Preference Points

The point's allocation for this bid will be as follows:

Price	80 points
B- BBEE Status Level of Contribution	<u>20 points</u>
Total	<u>100 points</u>

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference 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

NB: 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, 2017.

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to all bids:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
 - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

- a) The value of this bid is estimated to **not exceed** R50 000 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable; or
- b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

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

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

5. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

5.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

6. BID DECLARATION

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

7. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

7.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

8. SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

8.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		

Any EME		
Any QSE		

9. DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm:.....

9.2 VAT registration number:.....

9.3 Company registration number:.....

9.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One person business/sole propriety
- Close corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

9.6 COMPANY CLASSIFICATION

- Manufacturer
- Supplier
- Professional service provider
- Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

9.7 MUNICIPAL INFORMATION

Municipality where business is situated:

Registered Account Number:

Stand Number:.....

9.8 Total number of years the company/firm has been in business:.....

9.9 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding 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 bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>
--

<p>.....</p> <p>SIGNATURE(S) OF BIDDERS(S)</p> <p>DATE:</p> <p>ADDRESS</p> <p>.....</p>

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	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>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)?</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	<p>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?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

4.3.1	If so, furnish particulars:		
Item	Question	Yes	No
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 MONTHSs?	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"/>
4.5.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME).....CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM 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

.....
Date

.....
Position

.....
Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Municipal Bidding Document (MBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
 - a. take all reasonable steps to prevent such abuse;
 - b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
 - c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.
- 4 This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and/ or services for purchasers who wish to acquire goods and/ or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid: **BID NO 08/2/20/37: SERVICE PROVIDER FOR COMPILATION AND MAINTENANCE OF SUPPLEMENTARY VALUATION ROLL** invitation for the bid made by: **WITZENBERG MUNICIPALITY** does 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 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.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.
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

.....
Date

.....
Position

.....
Name of Bidder



BID NO 08/2/20/37: SERVICE PROVIDER FOR COMPILATION AND MAINTENANCE OF SUPPLEMENTARY VALUATION ROLL

Authorisation to deduct outstanding amounts

To: Municipal Manager, Witzenberg Municipality

From: _____
(Name of Bidder or Consortium)

AUTHORISATION FOR THE DEDUCTION OF OUTSTANDING AMOUNTS OWED TO COUNCIL

I, THE UNDERSIGNED,

(FULL NAME IN BLOCK LETTERS)

Hereby authorise the Witzenberg Municipality to deduct the full amount outstanding by the business organization / Director, shareholder, partner, etc from any payment due to us / me.

.....
Signature

THUS DONE AND SIGNED for and on behalf on the Bidder / Contractor

at on the day of 20.....
(Place) (Date) (Month) (Year)

in the presence of the subscribing witnesses.

AS WITNESSES:

1..... Name in Block Letters:
(SIGNATURE)

2..... Name in Block Letters:
(SIGNATURE)

To: Municipal Manager, Witzenberg Municipality

CERTIFICATE FOR MUNICIPAL SERVICES AND PAYMENTS TO SERVICE PROVIDER

BID NO 08/2/20/37: SERVICE PROVIDER FOR COMPILATION AND MAINTENANCE OF SUPPLEMENTARY VALUATION ROLL

NAME OF THE BIDDER:

FURTHER DETAILS OF THE BIDDER(S); Proprietor/ Director(s)/ Partner(s), etc:

Physical business address of Bidder	Municipal Account numbers

If there is not enough space for all the names, please attach the additional details to the Bid Document

Name of Director/Member/Partner	Identity number	Physical residential address of Director/Member/Partner	Municipal Account numbers

I, _____, the undersigned,
(full name in block letters)

certify that the information furnished on this declaration form is correct and that I/ we have no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is overdue for more than 90 days. Bidder must attach copy of their municipal account.

Signature

THUS DONE AND SIGNED for and on behalf on the Bidder/ Contractor

at on the Day of 20.....
(PLACE) (DATE) (MONTH) (YEAR)

Please Note:
Even if the requested information is not applicable to the Bidder, the table above should be endorsed and **THIS DECLARATION MUST STILL BE SIGNED.**



CHECK LIST FOR COMPLETENESS OF BID DOCUMENT

The bidder must ensure that the following checklist is completed, that the necessary documentation is attached to this bid document and that all declarations are signed:

**Mark with "X" where applicable*

Items to be checked	Yes	No	Comments
1. Completed page containing the details of bidder			
2. Bidders must provide a valid Tax Verification Details (Tax reference number and valid third party verification pin) as issued by SARS in order to confirm their tax compliance status. Failure to provide such details may result in your bid being disqualified.			
3. An original or certified copy / copy of the bidder's Broad-Based Black Economic Empowerment (B-BBEE) certificate must be attached to this bid document in order to claim B-BBEE points.			
4. Adhered to the pricing instructions (MBD 3.1)			
5. Completed and signed declaration of interest (MBD 4)			
6. Preference points claimed and signed declarations (MBD 6.1)			
7. Signed declaration of bidder's past supply chain management practices (MBD 8)			
8. Prohibition of Restrictive Practices (MBD9) be completed and signed.			
9. Comply with full specifications.			
10. Bidder must initial every page of this bid document.			
11. Bidder must attach full specifications if it deviates from the said specification			
12. Latest municipal account of the bidder and its directors must be attached a. If the bidder is not responsible for the payment of municipal rates and/ services, details in support of this must be attached to this bid document e.g. letter from landlord			

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)
CERTIFY THAT THE INFORMATION FURNISHED ON THIS CHECK LIST IS TRUE AND CORRECT.

.....

Signature

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Date

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Position

.....

Name