

**PART A  
INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE COMMUNITY SCHEMES OMBUD SERVICE</b>					
BID NUMBER:	RFQ07-2026/27	CLOSING DATE:	21 May 2026	CLOSING TIME:	12:00 PM
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS AND COMMITTEE PERFORMANCE EVALUATION.				
<b>BID RESPONSE DOCUMENTS MAY BE EMAILED TO THE BELOW (EMAIL ADDRESS)</b>					
<a href="mailto:quotations2@csos.org.za">quotations2@csos.org.za</a>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Nonkululeko Mthethwa		CONTACT PERSON	Klinsman Dube	
TELEPHONE NUMBER	(010) 593 0533		TELEPHONE NUMBER	(010) 593 0533	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	<a href="mailto:quotations2@csos.org.za">quotations2@csos.org.za</a>		E-MAIL ADDRESS	<a href="mailto:klinsman.dube@csos.org.za">klinsman.dube@csos.org.za</a>	
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>[A DETIALED CSD REPORT REFLECTING EME OR QSE 51% OR MORE BLACK OWNERSHIP FOR AT LEAST ONE OF THE DESIGNATED GROUPS MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR SPECIFIC GOALS]</b>					

<p>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</p>	<p><input type="checkbox"/>Yes <input type="checkbox"/>No [IF YES ENCLOSE PROOF]</p>	<p>ARE YOU A FOREIGN BASED SUPPLIER FOR THE <b>GOODS /SERVICES /WORKS OFFERED?</b></p>	<p><input type="checkbox"/>Yes <input type="checkbox"/>No [IF YES, ANSWER PART B:3]</p>
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**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?   
 YES  NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA?   
 YES  NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  
 YES  NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  
 YES  NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?   
 YES  NO

**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 BELOW.**

**PART B  
TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
<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. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b></p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022 THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b></p>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
<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 VERIFY THE TAXPAYER’S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> <p>2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE.”</p>

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....  
(Proof of authority must be submitted e.g., company resolution)

DATE: .....

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.



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**REQUEST FOR QUOTATIONS (RFQ)**

**APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS AND COMMITTEE PERFORMANCE EVALUATION.**

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**MAY 2026**

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

## 1. TERMS AND CONDITIONS

**This Request for Quotation (RFQ) has been compiled by the CSOS and is made available to Bidders subject to the following terms and conditions, which Bidders are deemed to acknowledge and accept:**

- 1.1. A quotation submitted in response to this RFQ will constitute a binding offer that will remain binding and irrevocable for a period of ninety (90) days from the date of submission to the CSOS.
- 1.2. Unless and until a binding contract is concluded between the CSOS and the successful Bidder, the offer constituted by the quotation shall not be deemed to have been accepted, and no agreement shall be deemed to be concluded with any Bidder.
- 1.3. The CSOS reserves the right to amend, modify, withdraw, or terminate this RFQ or any of the requirements set out herein at any time (and from time to time), without prior notice and without liability to compensate or reimburse any Bidder or person.
- 1.4. Should this RFQ be amended, the CSOS will publish the amendment and/or provide each Bidder with written notice of the amended RFQ. No oral amendment by either the Bidder or the CSOS shall be valid.
- 1.5. It is mandatory for a Bidder submitting a quotation to be registered on the National Treasury's Central Supplier Database ("**the CSD**") and to remain so registered for the duration of the contract, if appointed.
- 1.6. The Bidder must ensure that it is tax compliant at the time of submitting its quotation and remains tax compliant for the duration of the contract, if appointed, and undertakes to provide supporting documentation issued by the South African Revenue Services ("**SARS**") confirming it is tax compliant upon request by the CSOS.
- 1.7. The CSOS reserves the right to conduct site inspections and request supporting documentation in order to verify any information provided by a Bidder in its quotation.

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

- 1.8. This RFQ is not intended to form the basis of a decision to enter into any transaction with the CSOS and does not constitute an offer or recommendation to enter into such transaction, or an intention to enter into any legal relationship with any person.
- 1.9. Neither the CSOS nor any of its directors, officers, employees, agents, representatives, or advisors shall be liable for any costs or expenses incurred by any person in preparing or submitting a quotation in response to this RFQ.
- 1.10. No entity or associated entities may be involved, whether directly or indirectly, in more than one quotation in response to this RFQ. Failure to comply with this requirement may, at the sole discretion of the CSOS, result in the disqualification of both entities.
- 1.11. Any material change in the control, ownership, or composition of a Bidder, or any core member of a Bidder, after submission of a quotation, must be disclosed in writing to the CSOS Supply Chain Management (“**SCM**”) Section without delay. The CSOS shall be the sole arbiter as to what constitutes a material change in the control and/or composition of any Bidder and may in its sole discretion disqualify the Bidder from any further participation in the bid process.
- 1.12. Any requirement set out in this RFQ that stipulates the form and/or content of any aspect of a quotation is stipulated for the sole benefit of the CSOS, and unless the contrary is expressed, may be waived by the CSOS in its sole discretion at any stage in the quotation process.
- 1.13. The CSOS and its advisors shall be entitled to rely on the information and proposals contained in each quotation as being true, accurate and complete in all material aspects.
- 1.14. All quotations submitted to the CSOS shall become the property of the CSOS and will not be returned to the Bidders. The CSOS will use reasonable endeavours to keep proprietary information contained in quotations confidential, subject to applicable law.

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

- 1.15. A quotation may be regarded as non-responsive if it contains material omissions, qualifications, deviations, or irregularities. The CSOS reserves the right to waive immaterial non-responsiveness, where permissible and applied consistently to all Bidders.
- 1.16. The CSOS reserves the right to accept or reject any quotation, in whole or in part, subject to applicable law and procurement prescripts
- 1.17. The CSOS reserves the right to require a Bidder to make a formal presentation of its quotation at a date and time determined by the CSOS. The CSOS shall provide adequate instructions and clarification regarding the purpose and scope of the presentation. All expenses shall be borne by the Bidder.
- 1.18. In this RFQ, the terms "**Bidder**", "**service provider**", and "**supplier**" are used interchangeably, unless the context indicates otherwise.
- 1.19. All costs associated with the preparation and submission of the quotation shall remain for the account of the Bidder and shall not be recoverable from the CSOS. The costs shall not be chargeable to the CSOS by the successful or unsuccessful Bidder.
- 1.20. All quotations must be prepared and submitted in accordance with the requirements of this RFQ.
- 1.21. Quotations received after the stipulated closing date and time shall not be considered.
- 1.22. The CSOS is not obliged to appoint the bidder offering the lowest price, and may appoint another responsive and acceptable Bidder were justified in terms of functionality, capacity, risk, and overall value for money, subject to applicable procurement legislation.
- 1.23. In such circumstances, the CSOS may appoint another responsive Bidder, provided that the reasons for such decision are properly recorded and justifiable in terms of applicable procurement requirements

# APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

## 2. INTRODUCTION

- 2.1. The Community Schemes Ombud Service (“**CSOS**”) is established in terms of the Community Schemes Ombud Service Act, 2011 (Act 9 of 2011), to regulate the conduct of parties within community schemes and to promote good governance within community schemes. To deliver on its mandate, the key priorities of the organisation include:
  - 2.1.1. Regulation of all community schemes.
  - 2.1.2. Provision of dispute resolution services.
  - 2.1.3. Quality assurance of, and custodianship over, schemes governance documentation.
  - 2.1.4. Providing members with access to schemes governance documentation.
  - 2.1.5. Promoting and ensuring good governance within community schemes

## 3. Project Background

- 3.1. Principle 1 of the King V Code on Corporate Governance for South Africa, 2025 (“**King V**”) provides that the governing body should ensure that the evaluation of its own performance, and that of its committees, chairperson and individual members, supports continued improvement in its effectiveness and promotes accountability.
- 3.2. Section 4.6.1 of the 2023/24 Shareholder Compact Agreement concluded between the Minister of Human Settlements (Executive Authority) and the Board (Governing Body) of the CSOS provides that the Board undertakes to conduct annual Board and Committee performance evaluations, and that the evaluation reports shall be submitted to the Minister by 30 October each year for noting and action.
- 3.3. The envisaged evaluation will cover the Board, its committees, and individual directors, as contemplated in this RFQ.
- 3.4. The current Board comprises of seven (7) Non-Executive Directors and two (2) Executive Directors, namely the Chief Ombud and the Chief Financial Officer.
- 3.5. There are six sub-committees of the Board, namely: the Audit and Risk Committee, the Human Resources and Remuneration Committee (HR REMCO), the Social and Ethics Committee, the Legislation, Adjudication and Transformation Committee (LATCOM), the Finance Committee (FINCOM), and the Governance Committee.

# APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

## 4. SCOPE OF WORK

- 4.1. The CSOS requires the services of an external service provider to evaluate the effectiveness of the governing body and its sub-committees in the discharge of their respective mandates.
- 4.2. The evaluation should be aligned to the achievement of governance outcomes as contemplated in King V, including ethical culture, performance and value creation, conformance and prudent control, and legitimacy.
- 4.3. The appointed service provider shall be required to deliver, at a minimum, the following services and outputs:
  - Develop an Inception Report with a comprehensive methodology for the full Board evaluation process.
  - Assessment of the performance and effectiveness of the governing body as a whole.
  - Evaluate the six (6) Board committees to determine their contribution and effectiveness in fulfilling their respective mandates.
  - Evaluate individual Board members in order to assess their competence, preparedness, participation, contribution, and level of engagement.
  - The evaluation must be conducted with reference to accepted corporate governance principles and practices, including the applicable Shareholder Compact, King V, relevant legislation, and other applicable governance prescripts.
  - Provide a report setting out the results of the individual Board member assessments. The report must identify strengths, satisfactory areas of performance, development areas, and recommended remedial actions, including an action plan where improvement is required.
  - A report containing the results of the governing body self-evaluation, committee evaluations and the peer review undertaken by individual directors.
  - Provide a skills-gap analysis for the Board and individual directors, together with recommendations for a continuous professional development plan for each director and, where appropriate, for the Board collectively.
  - Present a Close-Out report of the evaluation findings and recommendations to the Board at a date to be determined by the CSOS.

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

- Develop and submit a Board Development Framework and Action Plan for the ensuing financial year, informed by the outcomes of the Board evaluation, committee evaluations, self-evaluation, peer review, and skills-gap analysis.
- Provide expert facilitation, methodological guidance, and administrative support necessary to conduct the evaluation process efficiently and confidentially.
- Identify any material governance, capability, or process issues arising from the evaluation that should be brought to the attention of the CSOS.

**5. SUPPLY CHAIN MANAGEMENT COMPLIANCE REQUIREMENTS**

DOCUMENTS	COMPLY /NOT COMPLY
Valid B-BBEE certificate issued by a SANAS-accredited verification agency, or a sworn affidavit signed by the authorised EME/QSE representative and commissioned by a Commissioner of Oaths, or a B-BBEE certificate issued by the Companies and Intellectual Property Commission (CIPC), where applicable.	
Proof of registration on the National Treasury Central Supplier Database (submit a CSD supplier report.	
Fully completed Standard Bidding Documents (SBD 1, SBD 3.3, SBD 4, and SBD 6.1).	

**6. MANDATORY REQUIREMENT**

6.1. Bidders must submit the following documents and non-compliance with the mandatory requirements below will result in disqualification, and such quotations will not be evaluated further for price and specific goals.

MANDATORY REQUIREMENT
<p>Attach a detailed CV of the proposed key resource responsible for leading the assignment, demonstrating (3) three relevant experience in governance advisory services, Board evaluations, committee assessments, or related assignments.</p> <p>The proposed key resource <b>MUST</b> be registered with a recognised professional body relevant to corporate governance, company secretariat, legal, compliance, or board evaluation practice, such as the Chartered Governance Institute of Southern Africa (CGISA) or the</p>

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

Institute of Directors South Africa (IoDSA) or the Legal Practice Council or the Compliance Institute Southern Africa **and the proof of membership/registration must be attached.**

Attach three (3) reference letters on the client's official letterhead, signed and containing contactable references demonstrating **the bidder's** experience in conducting Board and/or committee performance evaluations for public entities or state-owned entities, or comparable institutions within the past five (5) years.

**N.B Five (5) years will be calculated as at the closing date of the RFQ.**

**7. PRICING INSTRUCTION**

- 7.1. In order to facilitate a transparent selection process that affords equal opportunity to all bidders. Proposals will be evaluated using 80/20 formulae for price and specific goals as per 2022 PPPFA Regulations.
- 7.2. All pricing must be in South-African Rand (ZAR) and must be inclusive of all applicable taxes.

THE SPECIFIC GOALS ALLOCATED POINTS IN TERMS OF THIS TENDER.	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM) TO BE COMPLETED BY THE ORGAN OF STATE.	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM) TO BE COMPLETED BY THE TENDERER.
EME or QSE owned by 51% or more black person women; EME or QSE owned by 51% or more black person youth; EME or QSE owned by 51% or more black persons living with a disability; EME or QSE owned by 51% or more black person who is military veteran.	17	

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

EME or QSE owned by 51% or more black people living in rural or underdeveloped areas or townships.	1	
EME or QSE Co-operative owned by 51% or more black people	1	
EME or QSE is owned by 51% or more black people in general, with a focus in order of priority on Africans, Indians, and Coloureds.	1	
Total Points for Price and Specific Goals		

**8. PRICING SCHEDULE**

	Description	Unit	Price per person/Unit price	Total Price
1	Administration, planning, and scheduling and evaluation process (Board committee, individual director performance).	9		
2	Compilation of findings, preparation of reports, and presentation of the Board evaluation and peer review results to the Board Committees and the Board.	1 report		
3	Final consolidated report, including recommendations and Board Development Framework.	1 report		
	<b>Vat (If applicable)</b>			
	<b>Total including VAT</b>			

## APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

### **9. TIMELINE OF THE QUOTATION PROCESS**

- 9.1. The validity period of tenders and the withdrawal of offers, after the closing date and time is 90 days.

### **10. DURATION OF THE CONTRACT**

- 10.1. The appointment shall be for a fixed term ending upon completion of the project and acceptance by the CSOS of all agreed deliverables.
- 10.2. The bidder must demonstrate that it has the personnel, capacity, and availability to complete the assignment within the timeframe specified by the CSOS.

### **11. PROJECT MANAGEMENT RESPONSIBILITY**

- 11.1. The CSOS Project Manager's responsibilities will include:
- 11.2. Providing the service provider with all relevant information and documentation necessary for the successful execution of the assignment, and facilitating access, where required, to Board members, committee chairs, executives, management, and governance records.

### **12. SERVICE PROVIDER RESPONSIBILITIES**

- 12.1. The bidder must include a detailed line-item budget with its quotation. The appointed service provider may be required to refine the budget during contracting.
- 12.2. The successful bidder will be required to enter into a Service Level Agreement incorporating confidentiality, data protection, intellectual property, and conflict-of-interest provisions.
- 12.3. The service provider shall comply with the CSOS's applicable policies, procedures, and Code of Conduct while performing services on behalf of CSOS.

### **13. SUPPLIER DUE DILIGENCE**

- 13.1. CSOS reserves the right to conduct supplier due diligence prior to the final award or at any time during the contract period. This may include site visits, confirmation of financial stability and requests for additional information.

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

**14. RESPONSE FORMAT (SUBMISSION OF PROPOSAL)**

- 14.1. Quotations must be submitted in the prescribed format and must include all returnable schedules, standard bidding documents, supporting evidence, and pricing information required by this RFQ.
- 14.2. All attached standard bidding documents must be fully completed and signed where applicable.

**15. LATE QUOTATIONS**

- 15.1. Quotations received after the closing date and time at the designated email address stated in this RFQ will not be considered

**16. FRONTING**

- 16.1. Government supports the spirit of Broad Based Black Economic Empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent, and legally compliant manner. Against this background the Government condemns any form of fronting.
- 16.2. The Government, in ensuring that bidders conduct themselves in an honest manner will, as part of the quotation evaluation processes, conduct, or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in quotation documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry / investigation, the onus will be on the Bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the quotation/contract and may also result in the restriction of the Bidder /contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies CSOS may have against the Bidder / contractor concerned.

**17. CONTACT DETAILS FOR INFORMATION**

- 17.1. Further information regarding technical matters may be directed by email to [klinsman.dube@csos.org.za](mailto:klinsman.dube@csos.org.za) or Tel at 010 593 0533 /073 790 2603.

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS, BOARD COMMITTEE, AND INDIVIDUAL DIRECTOR PERFORMANCE EVALUATION.

- 17.2. Further information regarding supply chain management matters may be directed by email to [nonkululeko.mthethwa@csos.org.za](mailto:nonkululeko.mthethwa@csos.org.za) or at Tel: 010 593 0533.
- 17.3. A duly delegated official of the CSOS may communicate with Bidder(s) for purposes of seeking clarity on any aspect of a quotation
- 17.4. Any communication by a Bidder with an official of the CSOS, or any person acting in an advisory capacity to the CSOS, in relation to this quotation between the closing date and the award of the quotation is prohibited, unless initiated by the CSOS in writing
- 17.5. All communication between the Bidder(s) and CSOS must be in writing.
- 17.6. Whilst all due care has been taken in connection with the preparation of this quotation, CSOS makes no representations or warranties that the content of the quotation or any information communicated to or provided to Bidder(s) during the bidding process is, or will be, accurate, current, or complete. CSOS and its employees and advisors will not be liable with respect to any information communicated which may not be accurate, current, or complete.
- 17.7. If a Bidder finds, or reasonably believes that it has identified, any discrepancy, ambiguity, error, or inconsistency in this RFQ or in any other information provided by the CSOS, the Bidder must promptly notify the CSOS in writing.
- 17.8. Any actual discrepancy, ambiguity, error, or inconsistency identified in the RFQ or in any information provided by the CSOS will, where appropriate, be corrected and communicated to all Bidders without attribution.
- 17.9. All persons, including Bidder(s) obtaining or receiving this RFQ and any related information in connection with the quotation or tendering process, must keep the contents of this RFQ and such related information confidential and must not disclose or use such information except for the purpose of preparing a quotation in response to this RFQ.

## 18. SUBMISSION OF PROPOSALS

- 18.1. Quotation documents must be submitted by email to [quotations2@csos.org.za](mailto:quotations2@csos.org.za) on or before 21 May 2026 at 12h00 pm. Late submissions will not be accepted.

**PRICING SCHEDULE**  
**(Professional Services)**

**NAME OF BIDDER:** .....

**BIDNO: RFQ07-2026/27: THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE CSOS BOARD OF DIRECTORS AND COMMITTEE PERFORMANCE EVALUATION.**

**CLOSING TIME 12:00PM ON 21 MAY 2026.**

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

ITEM NO <u>TAX</u>	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <u>VALUE ADDED</u>
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1. Services must be quoted in accordance with the attached terms of reference.  
Total cost of the assignment (R inclusive VAT)

R.....

**PRICING SCHEDULE**

	Description	Unit	Price per person/Unit price	Total Price
1	Administration, planning, and scheduling and evaluation process (Board committee, individual director performance).	9		
2	Compilation of findings, preparation of reports, and presentation of the Board evaluation and peer review results to the Board Committees and the Board.	1 report		
3	Final consolidated report, including recommendations and Board Development Framework.	1 report		
	<b>Vat (If applicable)</b>			
	<b>Total including VAT</b>			

\_\_\_\_\_  
**Signature (Bidder)**

\_\_\_\_\_  
**Date**

The financial proposal for this assignment should cover for all assignment activities as per terms of reference

2. Period required for commencement with project after acceptance of bid \_\_\_\_\_
3. Are the rates quoted firm for the full period? Yes/No
4. If not firm for the full period, provide details of the basis on which Adjustments will be applied for, for example consumer price index.

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**Technical enquiries regarding bidding procedures may be directed to:**

Klinsman Dube

Tell: (010) 593 0533

E-mail address: [klinsman.dube@csos.org.za](mailto:klinsman.dube@csos.org.za)

**Supply Chain queries may be directed to:**

Nonkululeko Mthethwa

Tell: (010) 593 0533

Email: [quotations2@csos.org.za](mailto:quotations2@csos.org.za)

**PLEASE REFER TO THE ATTACHED TERMS OF REFERENCE FOR MORE INFORMATION.**

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....  
.....

**2.3** Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....  
.....

**3 DECLARATION**

I, \_\_\_\_\_ the \_\_\_\_\_ undersigned,  
(name).....in  
submitting the accompanying bid, do hereby make the following  
statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 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.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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<sup>2</sup> 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.

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

- 3.6 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	.....
Signature	Date
.....	.....
Position	Name of bidder

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

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

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

**1. GENERAL CONDITIONS**

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) Either the **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

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

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	<b>POINTS</b>
<b>PRICE</b>	80
<b>SPECIFIC GOALS</b>	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2. DEFINITIONS

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

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

#### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left( 1 - \frac{Pt - Pmin}{Pmin} \right) \quad \text{or} \quad Ps = 90 \left( 1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

- Ps = Points scored for price of tender under consideration  
 Pt = Price of tender under consideration  
 Pmin = Price of lowest acceptable tender

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

#### 3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right) \text{ or } Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

- Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration  
Pmax = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

***(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.***

***Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)***

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
1. EME or QSE owned by 51 % or more black woman; or more black person who are youth; or more black person living with disabilities; or more black person who is a military veteran	17	
2. EME or QSE owned by 51 % black people living in rural or underdeveloped areas or township	1	
3. EME or QSE Co-operative owned by 51% or more black people	1	
4. EME or QSE owned by 51% or more black people in general, with focus in order of priority on africans, Indians and coloureds.	1	

**DECLARATION WITH REGARD TO COMPANY/FIRM**

4.3. Name of company/firm.....

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

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

- 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 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
<b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....