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Treasury House, 145 Chief Albert Luthuli Street, Pietermaritzburg
Tel: 033 897 4440 Fax: 033 341 0986
Ref No. Bid 1261/2025-F

**MINUTES OF THE COMPULSORY BRIEFING SESSION FOR BID 1261/2025-F:
APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO ASSIST THE KWAZULU-
NATAL PROVINCIAL TREASURY TO PROVIDE SUPPORT TO DEPARTMENTS,
PUBLIC ENTITIES, MUNICIPALITIES, AND MUNICIPAL ENTITIES, TO ENSURE
IMPROVED SERVICE DELIVERY AND TURNAROUND TIMES IN SUPPLY CHAIN
MANAGEMENT ON AN “AS AND WHEN REQUIRED” BASIS FOR A PERIOD OF
THIRTY-SIX MONTHS.**

DEPARTMENT OF TREASURY OFFICIALS PRESENT:

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| Ms. T. Makhathini | Supply Chain Management | Chairperson |
| Mr. T. Cele | Provincial Supply Chain Management | Technical Presenter |
| Ms. A. Zondo | Supply Chain Management | Director SCM |
| Mr. N. Nxumalo | Supply Chain Management | Secretariat |
| Mr. N. Manyoni | Supply Chain Management | Secretariat |

Date: 18 November 2025
Time: 10:00 am
Venue: MS Team (Virtual).

1. OPENING AND WELCOME

Ms. T. Makhathini opened the meeting and welcomed all present to the meeting. All Departmental attendees were introduced.

2. ATTENDANCE

The attendees were requested to sign the attendance register (by completing the form that appears prior to signing in on MS Teams), and it was noted that it would serve as proof that the service providers attended the compulsory briefing session, and completing the compulsory certificate is not applicable as the meeting was conducted virtually.

3. PRESENTATION OUTLINE

- Opening and welcome
- Attendance
- Standard Bidding Documents
- Terms of Reference
- Questions and Answers
- Closure



| NO. | OVERVIEW OF THE BID DOCUMENT |
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| 1. | PAGES 1 – 5 OF THE BID DOCUMENTS |
| | <p>The Chairperson explained that the KwaZulu-Natal Provincial Treasury has published an invitation for prospective bidders to submit offers for inclusion in the Professional Service Providers Panel to provide support to Departments, Public Entities, Municipalities, and Municipal Entities, to ensure improved service delivery and turnaround times in supply chain management for a period of thirty-six months, and the following was noted.</p> <p>(a) The bid would be evaluated on the two following phases:</p> <ul style="list-style-type: none">- Phase 1 – Supply Chain Administrative Compliance.- Phase 2: Functionality Scoring <p>(b) Preference Point System</p> <ul style="list-style-type: none">- It was noted that the 80/20 Preference Point System would be applied in accordance with the Preferential Procurement Regulations (PPR), 2022, when proposals or curriculum vitae (CVs) are invited from the Panel. Under this system, 80 points will be allocated for price and 20 points for specific goals.- It was highlighted that the hourly rate to be paid per project, inclusive of disbursements and VAT, will be communicated to all companies, and the allocation of the 80 points will depend on the level of experience and expertise required for the specific assignment. The Department further reserves the right to determine which specific goals will be applicable when CVs are invited.- The specific goals that may be considered include Black-Owned Enterprises, Women-Owned Enterprises, Enterprises Owned by Persons with Disabilities, Reconstruction and Development Programme (RDP), Enterprises within KwaZulu-Natal, and Youth-Owned Enterprises. These goals will be selected by the Department on a project-by-project basis.- To claim points for specific goals, bidders will be required to submit supporting evidence such as an identity document, B-BBEE certificate or sworn affidavit, medical certificate confirming disability, proof of address, and CIPC registration documents to substantiate the points claimed.- Additionally, service providers will be required to complete SBD 6.1 in full and clearly indicate the points they intend to claim. All claims will be verified, and points will be awarded accordingly. <p>(c) In relation to communication, closing and submission of the proposal, the following was emphasised:</p> <ul style="list-style-type: none">- All enquiries may be emailed acquisition@kzntreasury.gov.za or directly call Mr. N Nxumalo or Thandeka Makhathini for SCM queries; and Mr. T Cele for technical inquiries on the contact numbers provided in the bid document.- The closing date for the bid will be 02 December 2025 at 11:00 am. Any bid received later than the stipulated date and time shall not be accepted. |



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| | <p>- The bid document must be deposited in the bid box located on the ground floor Treasury House, KZN Provincial Treasury, 145 Chief Albert Luthuli Street, Pietermaritzburg, 3200. Telegraphic, telephonic, telex, facsimile, e-mail, and late tender proposals shall not be accepted.</p> <p>(d) The bidders were requested to familiarise themselves with the definitions contained in the bid document to ensure a clear understanding of how the terminology used throughout the document should be interpreted.</p> |
| 2. | STANDARD BIDDING DOCUMENTS – PAGES 6 TO 41 |
| | <p>The Chairperson presented the requirements pertaining to the Standard Bidding Documents, and the following points were noted:</p> <p>2.1 SBD 1- Part A: Invitation to bid: The Chairperson emphasised that the supplier information must be duly completed.</p> <p>2.2 SBD 1 – Part B: Terms and Conditions for bidding: Bidders must read to understand the T&Cs outlined, and it must be signed by an authorized person.</p> <p>2.3 Section A – Special Instruction and notice to bidders regarding the completion of bidding forms: The Chairperson emphasised the following:</p> <ul style="list-style-type: none">(a) Under no circumstances whatsoever may the bid forms be retyped or redrafted(b) No bid sent through the post will be considered if it is received after the closing date and time stipulated in the bid documentation, and proof of posting will not be accepted as proof of delivery(c) Any alteration made by the bidder must be initialled, and the use of correcting fluid was prohibited.(d) The Bidders must initial each page of the bid document. <p>2.4 Section B - Registration on the Central Suppliers Database (CSD): Service providers must be registered on CSD, and if the supplier is not registered at the closing time of the bid, the supplier will be disqualified from the bid evaluation process.</p> <p>2.5 Section C: Declaration that information on CSD is correct and up to date: was for the declaration that the information on the CSD was correct and up to date. The Chairperson emphasised the following:</p> <ul style="list-style-type: none">(a) The bidders were advised to review the clauses under Section C, which state that the bidder confirms awareness of the information contained on the Central Supplier Database (CSD) pertaining to their details and registration information, and further confirms that such information is correct and up to date as at the date of submitting the bid.(b) The section further stipulates that the bidder should acknowledges that any incorrect or outdated information may result in the disqualification of the bid from the bidding process and/or the possible cancellation of any contract awarded on the basis of the submitted bid. |



2.6 Section D – Official Briefing Session/Site Inspection Certificate was not applicable to Bid 1261/2025-F. Attendance at the compulsory virtual briefing session will be confirmed solely through the attendance register, which serves as the only valid proof that the service provider participated in the meeting.

2.7 Section E- SBD 3.1, Pricing Schedule (Firm Prices) did not apply to Bid 1261/2025-F.

2.8 Section F – SBD 4, Bidders Disclosures: The Chairperson emphasised that bidders must complete and declare the information truthfully by indicating yes or no and furnish particulars where applicable, and the following was emphasized:

- (a) Paragraph 2.3 of SBD 4, bidders must declare by indicating yes or no and furnish (if applicable) whether their 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.
- (b) In cases where the bidder is involved in other enterprises, they are required to disclose those enterprises under paragraph 2.3.1. If the space provided is insufficient, a separate list of all associated companies must be submitted. Bidders were further advised that the CSD system verifies each director of an enterprise using their ID number; therefore, all information provided must be accurate and truthful in every respect.
- (c) Bidders were cautioned to clearly indicate the name of the signatory in paragraph 3 and on SDB 4 clause 3.2 stipulate “I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.”
- (d) SBD 4 also emphasis that “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.”

2.9 Section - The National Industrial Participation Programme did not apply to Bid 1261/2025-F.

2.10 Section H – SBD 6.1, Preference points claim form in terms of the preferential procurement regulations 2022: The 80/20 preference point system shall be applicable on a project basis.

2.11 Section I - Authority to Sign a Bid: It was emphasised that bidders must complete and sign the form with all the required information, and the following points were noted:

- (a) It must be completed by the signatory who has been duly authorised by the directors, members, or other relevant authority within the firm.
- (b) If the space provided is insufficient, service providers were instructed to list all directors in the attached resolution letter.



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| | <p>2.12 Section J -General Conditions of Contract: Bidders were requested to read the general conditions and familiarize themselves with the contents thereof.</p> <p>2.13 Section K - Special Conditions of Contract: Bidders must ensure that they read through all the special conditions, and the following were highlighted:</p> <ul style="list-style-type: none">(a) The successful bidders would be appointed for a period of thirty-six months, and the Department reserves the right to terminate the contract should the awarded entity fail to fulfil its contractual obligation in terms of this contract.(b) False Declaration or misrepresentation shall lead to disqualification.(c) The Provincial Supply Chain Management will stipulate the rates to be paid per hour. (inclusive of disbursements and VAT) per consultant. Invoices must indicate the order number or the invoice number and VAT number (where applicable)(d) Payment will only be processed upon receipt, verification of invoices, and confirmation by the appropriately authorized officials of actual services rendered.(e) The Department will verify the tax compliance status of a bidder through CSD or SARS, and bidders must ensure that their tax status is compliant on CSD or SARS.(f) Bids are late if they are received at the address indicated in the tender documents after the closing date and time, and late bids will not be considered.(g) The validity (binding) period for the bid must be 180 Days from the close of tender.(h) The publication of an award will be advertised in the same media as the invitation to bid.(i) The successful bidder shall be required to enter into a Consultancy Panel Agreement (CPA) with the Department(j) Bid Appeal Tribunal (BAT) procedure for lodging appeals was also highlighted, that the bidder must, within five working days of receipt of the notification of an award, deliver a written notification of an intention to appeal. |
| <p>3.</p> | <p>TERMS OF REFERENCE- PAGE 42 TO 53</p> |
| | <p>Mr. T. Cele presented that the KwaZulu-Natal Provincial Treasury intends to appoint a panel of service providers to assist Provincial Departments, Public Entities, Municipalities, and Municipal Entities in improving service delivery and turnaround times in Supply Chain Management (SCM). The panel will provide support on a project-by-project basis to address capacity gaps and strengthen SCM processes.</p> <p>(a) Background</p> <ul style="list-style-type: none">- It was highlighted that the Provincial SCM Unit is mandated to monitor and provide support to client institutions to ensure effective SCM and contract management, including internal controls and financial risk management. It was explained that many institutions face challenges due to limited resources, insufficient capacity, or inadequate systems, while some institutions may require SCM expert support periodically. |



- It was emphasized that, given the high volume and extent of interventions required, the Provincial SCM Unit seeks a panel of experienced and competent service providers to deliver timely assistance.

(b) Objective

- It was noted that the objective of this appointment is to secure service providers with expertise across all SCM components, including demand management, acquisitions, logistics, disposals, risk and performance management, and contract management. It was highlighted that service providers must demonstrate proven experience, innovative solutions, and the ability to transfer skills to client SCM staff.
- It was emphasized that services will include implementation and compliance with applicable legislation and frameworks such as the PFMA, MFMA, PPPFA, CIDB, and the Public Procurement Act, as well as relevant Treasury circulars, instructions, and public sector contract management guidelines.

(c) Scope of Work

- It was explained that the detailed scope of work will be project-specific and issued as needs arise. It was further stated that service providers will be required to assist the Provincial SCM Unit across all client institutions and that the following areas are of primary focus:

(i) SCM Support and Interventions

- It was highlighted that service providers may be required to provide hands-on support where client institutions lack adequate personnel. It was noted that the Provincial SCM Unit may request service providers to oversee SCM units under administration or intervention, including redesigning operating models, establishing new frameworks, enhancing efficiency, and ensuring compliance with legislation and strategic objectives.

(ii) SCM Performance Assessments

- It was explained that service providers may be requested to conduct structured assessments of SCM systems to determine compliance, identify gaps, and recommend mitigation strategies. It was emphasised that these assessments aim to improve the overall performance of client SCM functions.

(iii) Training and Capacity Building

- It was noted that capacity-building initiatives will be undertaken on an ongoing basis. Service providers may be required to conduct skills audits, deliver on-the-job training, facilitate workshops, develop training materials, and provide accredited training to client SCM staff.



(iv) Policy Development

- It was highlighted that service providers may be requested to assist in researching and drafting SCM policies and documents, ensuring alignment with applicable prescripts and addressing policy gaps in KwaZulu-Natal.

(v) Project Coordination and Administration

- It was noted that for larger projects, service providers may be required to coordinate project activities, develop project plans, manage client communications, introduce deployed teams, oversee deliverables, verify invoices, and produce reports.

(vi) Monitoring and Quality Assurance

- It was emphasised that service providers may be required to monitor the performance of deployed resources, assess compliance with SCM frameworks, verify expertise, implement quality control measures, and ensure effective project coordination.

(vii) SCM Contract Management

- It was highlighted that service providers may be requested to assist in developing and implementing contract management policies and procedures, re-engineering business processes, improving contract information reliability, ensuring compliance, and maintaining accurate records of contracts.

(viii) Infrastructure Procurement

- It was noted that service providers may be requested to advise and support clients on infrastructure-related projects, ensuring compliance with FIDPM and CIDB requirements.
- It was emphasised that the panel of service providers will be deployed on an as-and-when required basis, and the detailed requirements for each assignment will be provided in project-specific terms of reference.

(d) Expected Outcomes and Deliverables

- It was noted that the outputs for each project will be specified in the relevant Terms of Reference and will be directly aligned with the scope of work outlined in paragraph 3. It was emphasised that for each project, service providers are required to compile a monthly progress report, supported by weekly timesheets and a project close-out report.



(e) Communication and Reporting

- It was highlighted that service providers will report directly to the Provincial SCM Unit. It was noted that the Provincial SCM Unit would need to be kept informed of progress and any challenges encountered during the course of each project, and that sign-off must be obtained for each deliverable.
- It was emphasised that all communication and reporting plans, procedures, and protocols must be submitted to the Provincial SCM Unit for review and approval prior to implementation. Any amendments or revisions to approved communication plans must also be approved before taking effect. Skills transfer to client SCM staff will be confirmed in line with the agreed skills transfer plan, where applicable.

(f) Competency/Expertise Required

It was noted that service providers and their resources must possess such as the following minimum competencies and expertise:

- (i) Knowledge and expertise in implementing best practice SCM methodologies suitable for the public sector.
- (ii) Understanding of and experience with applicable legislation, including PFMA, MFMA, PPPFA, and the B-BBEE Act, as well as associated regulations and SCM-related prescripts.
- (iii) Experience in government systems such as BAS, Vulindlela, Logis, and the Central Supplier Database.
- (iv) Clear understanding of public sector dynamics across Provincial Departments, Public Entities, Municipalities, and Municipal Entities.
- (v) Ability to transfer skills and expertise to client SCM staff.
- (vi) Strong project management and interpersonal skills.

(g) Evaluation Guide

It was highlighted that the selection of service providers for placement on the panel will be subject to the evaluation criteria specified in the bid document. The evaluation will be conducted on the following basis:

- (i) Company Experience
 - It was emphasised that bidders must submit a minimum of three (3) contactable reference letters from clients, detailing SCM projects undertaken. It was noted that the veracity of each reference must be substantiated using the client-completed and stamped Annexure A. Failure to submit a duly completed Annexure A will result in zero points for the respective reference. Only projects with a minimum duration of 12 months will be considered, and references must relate to projects completed within the last five years. It was highlighted that the KZN Provincial Treasury reserves the right to contact any client listed to verify authenticity.



- It was further noted that experience in auditing, budgeting, accounting & reporting, and legal representation in SCM matters will not be considered as SCM support experience.

(ii) Resources

- It was emphasised that firms must submit CVs of only three (3) specialists with extensive public sector SCM experience, using the prescribed format in Annexure B. It was highlighted that each CV must include duration of service, contactable references, certified qualifications, and start and end dates of each contract/assignment/project. CVs not submitted in the prescribed format will be deemed non-responsive and rejected.
- It was noted that each CV submitted must be unique to the bidder and not included in other proposals. Any duplication of CVs across bidders will result in those CVs being disregarded for both bidders during evaluation.

It was emphasised that all service providers who score less than 65% for functionality will not be considered for placement on the panel.

4. **QUESTIONS AND ANSWERS**

(a) There is a challenge in obtaining reference letters from certain institutions. Will appointment letters be accepted as proof of completed work?

- *It was stated that appointment letters will not be accepted, as they only confirm the award or authorisation to commence work. They do not verify that the work was completed, nor do they reflect the performance of the work executed.*
- *Bidders who may be experiencing difficulties in obtaining reference letters for work completed for any of the KZN Public Institutions may contact the Department. The Department will assist in engaging the relevant institutions to facilitate the issuance of completed reference letters.*

(b) Since the briefing session was compulsory and conducted virtually, how will the briefing certificate be completed, signed, and stamped?

- *It was noted that a briefing certificate is not applicable for this tender.*
- *The attendance register completed by bidders who participated in the compulsory virtual briefing session will serve as proof of attendance.*

(c) The scope includes project and contract management. How will legal matters be addressed, and does this mean there will be a separate process for legal and technical requirements?

- *It was stated that the panel is strictly for SCM expertise, which includes contract management as an SCM element.*



- *In addition, it was highlighted that the Department already has an existing panel for various disciplines, including legal services under the Corporate Services Unit. The Department will continue to source procurement law specific support from the Legal services panel.*
- (d) Bidders indicated challenges with the customized reference letter templates, especially where they already possess reference letters from previous clients.
- *It was noted that there are challenges pertaining the completion of the customized templates, however, standard reference letters often do not sufficiently address the aspects that the Provincial Treasury would like to assess in confirming the competence of the service provider.*
- *Thus, the customized template has been introduced to ensure bidders provide complete and responsive information aligned with the Terms of Reference.*
- (e) Will the Department accept reference letters issued by the KZN Provincial Treasury itself, or only those from other institutions?
- *It was noted that there is no restriction regarding the issuing institution, thus, all reference letters are acceptable, including those issued by the KZN Provincial Treasury*
- (f) Since the qualification requirements focus on SCM-related fields, will qualifications such as Financial Management or Chartered Accountancy receive zero points?
- *It was stated that only qualifications in Supply Chain Management, Logistics, Operations Management, Purchasing, Law, or Public Management/Administration will be considered, as stipulated in the Terms of Reference.*
- *It was also emphasized that this is a specialized SCM tender, therefore non-SCM-related qualifications will not earn points under the qualification criteria.*
- (g) What happens if the Project Manager who supervised the bidder's work has left the institution and cannot complete the reference letter?
- *It was stated that it remains the bidder's responsibility to engage the institution and they may escalate the request to the Accounting Officer or Head of Department.*
- *It was also highlighted that the SCM units of the institutions maintain project records and should be able to assist by completing the reference letter based on available project information.*
- (h) The minimum experience required is 12 months per project, but many projects last 3 to 6 months. Will this result in disqualification?
- *It was stated that only those projects with a minimum duration of 12 months would be considered as they are the most reliable basis for evaluating the bidder's capability. It was further emphasized that company experience does not account for a great portion of the functionality criteria, in such a way that even if a bidder does not score points in this criterion, they may still proceed if they attain maximum points in the other criterion.*



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| | <p>➤ <i>Therefore, it should be noted that the strength of individual experience of resources may result in a bidder being placed on the panel even if project durations are less than 12 months.</i></p> <p>(i) How many copies of the proposal must be submitted?</p> <p>➤ <i>It was noted that only one (1) proposal is required.</i></p> <p>(j) Is there a maximum number of pages allowed for the CVs?</p> <p>➤ <i>It was noted that there is no page limit for CV submissions.</i></p> <p>(k) Will the Department accept reference letters that are signed and emailed by the issuing institution?</p> <p>➤ <i>It was noted that the duly completed and signed reference letters submitted electronically will be accepted.</i></p> <p>(l) Is a company profile required for this tender?</p> <p>➤ <i>It was noted that a company profile is not required and only reference letters are required to assess company experience.</i></p> <p>(m) Are bidders required to submit three reference letters per client/institution, or three reference letters per project?</p> <p>➤ <i>It was noted that the requirement was per project and bidders may submit three project reference letters from the same institution.</i></p> |
| 5 | <p>Deliberations</p> <p>It was noted that the CV format template will be revised to incorporate the provision of student numbers and contactable references. The amended CV templates and the briefing session minutes will be circulated to all bidders who attended the compulsory session.</p> |
| 6 | <p>Meeting Closure:</p> <p>The Chairperson thanked all present for their robust participation throughout the meeting.</p> |