

# MINUTES OF THE BRIEFING SESSION BUDGET AND TAX

Time and Date: Friday, 24 January 2020 at 10:00

Venue: Fasset Ingonyama Boardroom



## PRESENT:

### Fasset Members

Mathapelo Makomene	Procurement Officer
Sello Malatsi	Projects Specialist

### Individuals from various companies.

## 1. WELCOME

MM opened the meeting by welcoming everyone. The attendance register was circulated and signed by all service providers present.

## 2. APOLOGIES:

No apologies were noted.

## 3. COMPLIANCE

MM reported that:

- The briefing session was compulsory. Bids will not be accepted from providers who did not attend the session.
- The tender was advertised on 17 January 2020 on the Fasset website, etender Portal and Government tender bulletin.
- The tender closes on 07 February 2020 at 11:00. Late submissions will not be accepted.
- Bid received late will be sent back to the bidders unopened
- Questions will also be taken via email. Respond to be provided in three days time.
- Presentation and Minutes of the briefing session as well as Questions and Answers will be published on the Fasset website.
- Bid submission must clearly reflect the correct tender reference number.
- An original document plus three hard copies must be submitted. Failure will result in elimination.

### Compliance Documents

Fasset is a Government Entity and governed by relevant legislation as a result bidders need to fully complete and sign the following compliance documents stipulated in page 64 & 65 of the bid document:

- 1 Original and 3 copies of bid documents to be submitted.
- POPI Act Consent Form to enable Fasset to publish all submissions on the website.
- Declaration of interest document (SBD4) – fully completed and signed. Details of directors must be listed i.e. Names, ID numbers as well as Tax reference numbers as per the table provided.
- Declaration of bidders past SCM practices (SBD 8).
- Certificate of Independent bid determination (SBD 9).
- Preference points claim form completed and signed (SBD 6.1). Bidders should indicate whether they are sub-contracting or not. Fasset would like to conduct business with bidders who are at least 51% Black owned. Bidders who do not meet this criteria should sub-contract a minimum of 30% of the value of the contract to company that is at least 51% Black owned.

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- Valid BEE certificate, or certified copy issued by a Sanas accredited verification agency or a Sworn Affidavit or an affidavit issued by CIPC. A combined BEE certificate in the case of a Trust or consortium/Joint Venture.
- Invitation to bid to be completed in full and signed. Please include the Total Bid Price (SBD 1)
- Contract Form – Rendering of service will be completed by the successful bidder
- Latest audited Financial Statement not older than three years.
- Tax Compliance (CSD or SARS pin) It should be noted that SARS has terminated issuing of TCC after 25 October 2019 hence bidders are encouraged to submit a Tax Compliance Status PIN
- CSD Summary report need to be provided.
- Business registration documents.
- VAT registration documents.

**4. Evaluation Process**

MM reported that:

- The tender was advertised on the Government Gazette, E-tender portal and Fasset website.
- Bid document can be downloaded from the Fasset website or requested via email
- The tender closes on 07 February 2020
- Bids will be evaluated on the 80/20 principle
- Compliance check will be done after tender closure to confirm compliance.
- Compliant providers will be evaluation by the Bid Evaluation Committee.
- Provider needs to score 70% and above for functionality during evaluation in order to make it through to the next phase.
- The next stage of evaluation will be to look at the Pricing and BBEE. Providers who have 100% black ownership obtain 20 points.
- Recommendation report will then be forwarded to the Bid Adjudication Committee.
- Envisaged date of award is 06 March 2020
- Successful bidder will be informed via email.
- Unsuccessful bidders will also be informed via email.
- The name of the successful bidder will be published on the Fasset website.

**5. Technical**

SM gave a brief presentation on the technical aspect of the tender:

- Budget and Tax update is part of the free training (Lifelong Learning) offered by Fasset which assists its members remain upskilled in a range of subject areas.
- Budget and Tax update fall under financial and legislative courses
- Budget and Tax update is one of the prominent trainings to Fasset
- Highest recorded attendance of 7286 for the Budget and Tax update training was in the 2017/2018 financial year

**Summary of Event Spec**

Requirements	Details
Target audience	Employees working for firms registered with Fasset

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	Skills level	High
	Trainers required	3 trainers and 2 additional backups
	Dry-Run	Yes
	<ul style="list-style-type: none"><li>• Bidders must meet a minimum score of 70% for the functionality evaluation</li><li>• Bidders who obtain a minimum score of 70% and above will be further evaluated for Price &amp; BBBEE</li><li>• Use the pricing sheet uploaded on the Fasset website</li><li>• Ensure that the tender document is presentable for the evaluation committee</li><li>• Do not compromise on the quality of the CV's for the proposed speakers</li><li>• Bidders are encouraged to read the tender document thoroughly</li></ul>	
<b>6. QUESTIONS &amp; ANSWERS</b>	<b>Question</b>	<b>Answer</b>
	Is it necessary to initial the tender document?	No, it is not an eliminating factor however it will assist the bidder in ensuring that each page is completed in full
	Who carries the event management costs? Flights and venues?	Fasset.
	When are the events expected to start	March 2020
<b>7. GENERAL</b>	<ul style="list-style-type: none"><li>➤ All other question to be sent via email. Telephone queries will not be accepted.</li><li>➤ The tender closes on 07 February 2020 at 11:00. Late submissions will not be accepted.</li></ul>	
<b>8. MEETING CLOSURE</b>	The meeting closed at 10:40	