



Reference: 20190731-7421
File no.: 5/1/P
Enquiries: JT Solomons

Procurement Management Minute: 0002/2019

To: Deputy Directors-General, Chief Directors, Directors (Head Office and district offices), Deputy Directors and SCM practitioners and SCM Champions at Head Office and District offices

Subject: Revision of the official procurement templates (Addendums) to the Accounting Officer System (AOS)

1. The recent findings of the Auditor General (AG) have necessitated the revision of the official procurement templates for the purchases of goods and services (Addendums 5 & 6) to the Accounting Officer System (AOS) to ensure segregation of duties.
2. The procurement thresholds have also been revised to mitigate the findings of the AG.
3. The revised procurement templates must be implemented in the supply chain with immediate effect.
4. It is of utmost importance that the relevant procurement templates are used in terms of the applicable delegation to the AOS.
5. Kindly bring the contents of this minute to the attention of all relevant personnel.
6. Your cooperation in this regard will be appreciated.

SIGNED: BK SCHREUDER
HEAD: EDUCATION
DATE: 2019-09-06

Directorate: Procurement Management

The Chairperson
Head Office Quotation Committee

OFFICIAL PROCUREMENT TEMPLATE FOR PURCHASES BETWEEN R1 AND R200 000

SECTION A: USER INFORMATION

A1. Description of goods/services.								
A2. Is the need repetitive and is it envisaged that the annual need will exceed R500 000?				NO		YES		If YES, consider competitive bidding process
A3. Quantity of goods required?				A4. Estimated total cost (Incl. VAT)				
A5. Is the request in line with budget?		YES		NO	If NO, motivate the source of funds to be used.			
A6. Identify the SCOA Codes (LOGIS Users Only).		Fund	Responsibility	Objective	Project	Item	Regional Identifier	Assets
A6. Identify the Stock Code/ICN Number, where applicable.								

SECTION B: QUOTATION INFORMATION

B1. How have the quotes been obtained?		Written Quotes		Electronic Quotes (Tradeworld)		Other (Specify)
B2. If less than 3 quotes have been obtained, provide reasons why?						
B3. Pricing and Preferential Procurement Information (If required, attach separate sheet).						

SUPPLIER	PRICE	POINTS FOR PRICE	B-BBEE POINTS	TOTAL POINTS
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SECTION C : BIDDER RECOMMENDED FOR ACCEPTANCE

C1. _____ is the recommended supplier with the highest total points of _____ at a total price of _____ (Incl. VAT).		
C2. Another ___ offers were received with price ranges of: R _____ - to R _____ - (Incl. VAT) but do not provide any value for the Department.		
C3. Are there any offers received and passed over? YES <input type="checkbox"/> NO <input type="checkbox"/> If YES, give details below.		
SUPPLIERS	PRICE	REASONS FOR PASSING OVER
1		
2		
3		

SECTION D: SCM COMPLIANCE

D1. I hereby confirm that: |

- specifications for the product/service were developed in accordance with the departmental prescripts.
- that all quotations obtained have been verified and that no supplier has been prejudiced.

I hereby also declare/confirm that I have no interest in any bid under consideration.

D2. The recommended bidder is registered on the Western Cape Supplier Database/Central Supplier Database.

D3. The recommended bidder's tax matters are in order.

D4. The recommended bidder is not on the list of tender defaulters or restricted suppliers.

D5. I have ensured that the successful bidder has completed the WCBD4 form.

D6. The end user has confirmed that the product/service is acceptable.

Compiled by:		Rank:	
Signature:		Date:	

SECTION E: CONSIDERATION/RECOMMENDATION BY HEAD OFFICE QUOTATION COMMITTEE

(Tick the application)				DECLARATION OF INTEREST BY QUOTATION COMMITTEE MEMBERS	
	YES	NO	N/A	Name	Signature
E1. Is all necessary documentation attached?					
E2. Is the request well motivated?					
E3. Disqualifications are justified and that valid and accountable reasons/ motivations were furnished for passing over of bids.					
E4. Scoring has been fair, consistent and correctly calculated and applied.					
E5. The ability of the vendor to execute the contract from a technical and financial view was verified.					
E6. Is the bid to specification in terms of quality, design, functionality, dimensions, support, guarantee, etc.					
E7. Is the offer value for money?					
E8. Has the previous success or failure of contracts been considered?					

If any of the above answers is NO, motivate and / or give reasons.

SECTION F: APPROVAL BY CHAIRPERSON OF THE HEAD OFFICE QUOTATION COMMITTEE

Comments:

Contract award is hereby APPROVED / NOT APPROVED (delete inapplicable) according to delegation no. 2/31 (delete inapplicable) of the Accounting Officer's System.

Authorised by:		Rank:	
Signature:		Date:	

Directorate: Procurement Management

The Deputy Director: SCM Operations

OFFICIAL PROCUREMENT TEMPLATE FOR PURCHASES BETWEEN R200 000.01 AND R500 000

SECTION A: USER INFORMATION							
A1. Description of goods/services.							
A2. Is the need repetitive and is it envisaged that the annual need will exceed R500 000?				NO		YES	
				If YES, consider competitive bidding process			
A3. Quantity of goods required?				A4. Estimated total cost (Incl. VAT)			
A5. Is the request in line with budget?		YES		NO			
		If NO, motivate the source of funds to be used.					
A6. Identify the SCOA Codes (LOGIS Users Only).		Fund	Responsibility	Objective	Project	Item	Regional Identifier
							Assets
A6. Identify the Stock Code/ICN Number (where applicable).							
SECTION B: QUOTATION INFORMATION							
B1. How have the quotes been obtained?		Written Quotes		Electronic Quotes (Tradeworld)		Other (Specify)	
B2. If less than 3 quotes have been obtained, provide reasons why?							
B3. Pricing and Preferential Procurement Information (If required, attach separate sheet).							
SUPPLIER		PRICE	POINTS FOR PRICE	B-BBEE POINTS	TOTAL POINTS		
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SECTION C : BIDDER RECOMMENDED FOR ACCEPTANCE							
C1. _____ is the recommended supplier with the highest total points of _____ at a total price of _____ (Incl. VAT).							
C2. Another ___ offers were received with price ranges of: R _____ - to R _____ - (Incl. VAT) but do not provide any value for the Department.							
C3. Are there any offers received and passed over?				YES		NO	
				If YES, give details below.			
SUPPLIERS		PRICE	REASONS FOR PASSING OVER				
1							
2							
3							

SECTION D: SCM COMPLIANCE

D1. I Hereby confirm that: |
 • specifications for the product/service were developed in accordance with the departmental prescripts.
 • that all quotations obtained have been verified and that no supplier has been prejudiced.
I hereby also declare/confirm that I have no interest in any bid under consideration.

D2. The recommended bidder is registered on the Western Cape Supplier Database/Central Supplier Database.

D3. The recommended bidder's tax matters are in order.

D4. The recommended bidder is not on the list of tender defaulters or restricted suppliers.

D5. I have ensured that the successful bidder has completed the WCBD4 form.

D6. The end user has confirmed that the product/service is acceptable.

Compiled by: _____ Rank: _____

Signature: _____ Date: _____

SECTION E: CONSIDERATION/RECOMMENDATION BY HEAD OFFICE QUOTATION COMMITTEE

(Tick the application)				DECLARATION OF INTEREST BY QUOTATION COMMITTEE MEMBERS	
	YES	NO	N/A	Name	Signature
E1. Is all necessary documentation attached?					
E2. Is the request well motivated?					
E3. Disqualifications are justified and that valid and accountable reasons/ motivations were furnished for passing over of bids.					
E4. Scoring has been fair, consistent and correctly calculated and applied.					
E5. The ability of the vendor to execute the contract from a technical and financial view was verified.					
E6. Is the bid to specification in terms of quality, design, functionality, dimensions, support, guarantee, etc.					
E7. Is the offer value for money?					
E8. Has the previous success or failure of contracts been considered?					

If any of the above answers is NO, motivate and / or give reasons.

SECTION F: APPROVAL BY DEPUTY DIRECTOR: SCM OPERATIONS

Comments:

Contract award is hereby APPROVED / NOT APPROVED (delete inapplicable) according to delegation no. 2 of the Accounting Officer's System.

Authorised by: _____ Rank: _____

Signature: _____ Date: _____

Directorate: Institutional Resource Support

The Chairperson
LTSM Quotation Committee

OFFICIAL PROCUREMENT TEMPLATE FOR PURCHASES BETWEEN R1 AND R500 000										
SECTION A: USER INFORMATION										
A1. Description of goods/services.										
A2. Is the need repetitive and is it envisaged that the annual need will exceed R500 000?					NO		YES		If YES, consider competitive bidding process	
A3. Quantity of goods required?						A4. Estimated total cost (Incl. VAT)				
A5. Is the request in line with budget?		YES		NO		If NO, motivate the source of funds to be used.				
A6. Identify the SCOA Codes (LOGIS Users Only).		Fund	Responsibility	Objective	Project	Item	Regional Identifier	Assets		
A6. Identify the Stock Code/ICN Number(where applicable).										
SECTION B: QUOTATION INFORMATION										
B1. How have the quotes been obtained?			Written Quotes		Electronic Quotes (Tradeworld)		Other (Specify)			
B2. If less than 3 quotes have been obtained, provide reasons why?										
B3. Pricing and Preferential Procurement Information (If required, attach separate sheet).										
SUPPLIER		PRICE		POINTS FOR PRICE		B-BBEE POINTS		TOTAL POINTS		
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SECTION C : BIDDER RECOMMENDED FOR ACCEPTANCE										
C1. _____ is the recommended supplier with the highest total points of _____ at a total price of _____ (Incl. VAT).										
C2. Another ___ offers were received with price ranges of: R _____ - to R _____ - (Incl. VAT) but do not provide any value for the Department.										
C3. Are there any offers received and passed over?					YES		NO		If YES, give details below.	
SUPPLIERS		PRICE		REASONS FOR PASSING OVER						
1										
2										
3										

SECTION D: SCM COMPLIANCE

D1. I hereby confirm that: |

- specifications for the product/service were developed in accordance with the departmental prescripts.
- that all quotations obtained have been verified and that no supplier has been prejudiced.

I hereby also declare/confirm that I have no interest in any bid under consideration.

D2. The recommended bidder is registered on the Western Cape Supplier Database/Central Supplier Database.

D3. The recommended bidder's tax matters are in order.

D4. The recommended bidder is not on the list of tender defaulters or restricted suppliers.

D5. I have ensured that the successful bidder has completed the WCBD4 form.

D6. The end user has confirmed that the product/service is acceptable.

Compiled by:		Rank:	
Signature:		Date:	

SECTION E: CONSIDERATION/RECOMMENDATION BY LTSM QUOTATION COMMITTEE

(Tick the application)				DECLARATION OF INTEREST BY QUOTATION COMMITTEE MEMBERS	
	YES	NO	N/A	Name	Signature
E1. Is all necessary documentation attached?					
E2. Is the request well motivated?					
E3. Disqualifications are justified and that valid and accountable reasons/ motivations were furnished for passing over of bids.					
E4. Scoring has been fair, consistent and correctly calculated and applied.					
E5. The ability of the vendor to execute the contract from a technical and financial view was verified.					
E6. Is the bid to specification in terms of quality, design, functionality, dimensions, support, guarantee, etc.					
E7. Is the offer value for money?					
E8. Has the previous success or failure of contracts been considered?					

If any of the above answers is NO, motivate and / or give reasons.

SECTION F: APPROVAL BY CHAIRPERSON OF THE LTSM QUOTATION COMMITTEE

Comments:

Contract award is hereby APPROVED / NOT APPROVED (delete inapplicable) according to delegation no. 2 of the Accounting Officer's System.

Authorised by:		Rank:	
Signature:		Date:	

Directorate: Procurement Management

The Deputy Director-General:Corporate Services

OFFICIAL PROCUREMENT TEMPLATE FOR PURCHASES FROM R200 000.01										
SECTION A: USER INFORMATION										
A1. Description of goods/services.										
A2. Is the need repetitive and is it envisaged that the annual need will exceed R500 000?					NO		YES		If YES, consider competitive bidding process	
A3. Quantity of goods required?						A4. Estimated total cost (Incl. VAT)				
A5. Is the request in line with budget?		YES		NO		If NO, motivate the source of funds to be used.				
A6. Identify the SCOA Codes (LOGIS Users Only).		Fund	Responsibility	Objective	Project	Item	Regional Identifier	Assets		
A6. Identify the Stock Code/ICN Number(where applicable).										
SECTION B: QUOTATION INFORMATION										
B1. How have the quotes been obtained?			Written Quotes		Electronic Quotes (Tradeworld)		Other (Specify)			
B2. If less than 3 quotes have been obtained, provide reasons why.										
B3. Pricing and Preferential Procurement Information (If required, attach separate sheet).										
SUPPLIER			PRICE		POINTS FOR PRICE		B-BBEE POINTS		TOTAL POINTS	
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SECTION C : BIDDER RECOMMENDED FOR ACCEPTANCE										
C1. _____ is the recommended supplier with the highest total points of _____ at a total price of _____ (Incl. VAT).										
C2. Another ___ offers were received with price ranges of: R _____ - to R _____ - (Incl. VAT) but do not provide any value for the Department.										
C3. Are there any offers received and passed over?					YES		NO		If YES, give details below.	
SUPPLIERS			PRICE		REASONS FOR PASSING OVER					
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SECTION D: SCM COMPLIANCE

D1. I Hereby confirm that: |
 • specifications for the product/service were developed in accordance with the departmental prescripts.
 • that all quotations obtained have been verified and that no supplier has been prejudiced.
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D4. The recommended bidder is not on the list of tender defaulters or restricted suppliers.

D5. I have ensured that the successful bidder has completed the WCBD4 form.

D6. The end user has confirmed that the product/service is acceptable.

Compiled by: _____ Rank: _____

Signature: _____ Date: _____

SECTION E: CONSIDERATION/RECOMMENDATION BY HEAD OFFICE QUOTATION COMMITTEE

(Tick the application)				DECLARATION OF INTEREST BY QUOTATION COMMITTEE MEMBERS	
	YES	NO	N/A	Name	Signature
E1. Is all necessary documentation attached?					
E2. Is the request well motivated?					
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E5. The ability of the vendor to execute the contract from a technical and financial view was verified.					
E6. Is the bid to specification in terms of quality, design, functionality, dimensions, support, guarantee, etc.					
E7. Is the offer value for money?					
E8. Has the previous success or failure of contracts been considered?					

If any of the above answers is NO, motivate and /or give reasons.

SECTION F: APPROVAL BY DEPUTY DIRECTOR-GENERAL: CORPORATE SERVICES

Comments:

Contract award is hereby APPROVED / NOT APPROVED (delete inapplicable) according to delegation no. 31 of the Accounting Officer's System.

Authorised by: _____ Rank: _____

Signature: _____ Date: _____

District Office: xxx

The Chairperson

Education District Office Quotation Committee

OFFICIAL PROCUREMENT TEMPLATE FOR PURCHASES BETWEEN R1 AND R100 000										
SECTION A: USER INFORMATION										
A1. Description of goods/services.										
A2. Is the need repetitive and is it envisaged that the annual need will exceed R500 000?					NO		YES		If YES, consider competitive bidding process.	
A3. Quantity of goods required?						A4. Estimated total cost (Incl. VAT)				
A5. Is the request in line with budget?		YES		NO		If NO, motivate the source of funds to be used.				
A6. Identify the SCOA Codes (LOGIS Users Only).		Fund	Responsibility	Objective	Project	Item	Regional Identifier	Assets		
A6. Identify the Stock Code/ICN Number(where applicable).										
SECTION B: QUOTATION INFORMATION										
B1. How have the quotes been obtained?		Written Quotes				Electronic Quotes (Tradeworld)		Other (Specify):		
B2. If less than 3 quotes have been obtained, provide reasons why.										
B3. Pricing and Preferential Procurement Information (If required, attach separate sheet).										
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SECTION C : BIDDER RECOMMENDED FOR ACCEPTANCE										
C1. _____ is the recommended supplier with the highest total points of _____ at a total price of _____ (Incl. VAT).										
C2. Another ____ offers were received with price ranges of: R _____ - to R _____ - (Incl. VAT) but do not provide any value for the Department.										
C3. Are there any offers received and passed over?					YES		NO		If YES, give details below.	
SUPPLIERS		PRICE			REASONS FOR PASSING OVER					
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2										
3										

SECTION D: SCM COMPLIANCE

D1. I hereby confirm that: |

- specifications for the product/service were developed in accordance with the departmental prescripts.
- that all quotations obtained have been verified and that no supplier has been prejudiced.

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D3. The recommended bidder's tax matters are in order.

D4. The recommended bidder is not on the list of tender defaulters or restricted suppliers.

D5. I have ensured that the successful bidder has completed the WCBD4 form.

D6. The end user has confirmed that the product / service is acceptable.

Compiled by:		Rank:	
Signature:		Date:	

SECTION E: CONSIDERATION/RECOMMENDATION BY EDUCATION DISTRICT OFFICE QUOTATION COMMITTEE

(Tick the application)				DECLARATION OF INTEREST BY EDO QUOTATION COMMITTEE MEMBERS	
	YES	NO	N/A	Name	Signature
E1. Is all necessary documentation attached?					
E2. Is the request well motivated?					
E3. Disqualifications are justified and that valid and accountable reasons/ motivations were furnished for passing over of bids.					
E4. Scoring has been fair, consistent and correctly calculated and applied.					
E5. The ability of the vendor to execute the contract from a technical and financial view was verified.					
E6. Is the bid to specification in terms of quality, design, functionality, dimensions, support, guarantee, etc.					
E7. Is the offer value for money?					
E8. Has the previous success or failure of contracts been considered?					

If any of the above answers is NO, motivate and/or give reasons.

SECTION F: APPROVAL BY CHAIRPERSON OF THE EDUCATION DISTRICT OFFICE QUOTATION COMMITTEE

Comments:

Contract award is hereby APPROVED / NOT APPROVED (delete inapplicable) according to delegation no. 2/31 (delete inapplicable) of the Accounting Officer's System.

Authorised by:		Rank:	
Signature:		Date:	