

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE INGONYAMA TRUST BOARD					
BID NUMBER:	ITB/14/10/2026	CLOSING DATE:	30/10/2026	CLOSING TIME:	15h00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO SUPPORT INGONYAMA TRUST IN BUDGET REFORM AND IMPLEMENTATION OF SCOA.				
BID RESPONSE MUST BE EMAILED TO					
melody.ngubo@ingonyamatrust.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms. M Ngubo		CONTACT PERSON	Mr S Mkhize	
TELEPHONE NUMBER	033 846 9958/ 071 882 9592		TELEPHONE NUMBER	033 846 9961/ 069 007 4747	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	melody.ngubo@ingonyamatrust.org.za		E-MAIL ADDRESS	sanele.mkhize@ingonyamatrust.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ Yes ☐ No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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****1. BID SUBMISSION:**

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 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.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 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."

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:

.....

PRICING SCHEDULE

NAME OF BIDDER:

BID NO.: ITB/14/10/2026

CLOSING DATE: 30/10/2026

CLOSING TIME: 15H00 PM

OFFER TO BE VALID FOR **60 DAYS** FROM THE CLOSING DATE OF BID.**DESCRIPTION & PRICE DETAILS OF SERVICE REQUIRED**

DESCRIPTION	TOTAL
Appointment of a Service Provider to Support Ingonyama Trust in Budget Reform and Implementation of the Standard Chart of Accounts (Complete Budget Reform Assignment). <i>(as per specification)</i>	
SUB-TOTAL	
VAT @ 15%	
TOTAL	

Amount in words. _____

I (full name) _____, in my capacity as _____, the duly authorized representative of _____ (business name) hereby declares that the offer is in accordance with the attached specification, notes to suppliers & accepts all conditions/clauses contained in the said documents.

Signature of duly authorised representative

Date:

NB: failure to sign this price page will invalidate the bid/quote.

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

- 1.1 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, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.
- 1.2 If a person is 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. DECLARATION ON EMPLOYMENT BY ORGAN OF STATE

- 2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution?
YES/NO
- 2.2 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	Identity Number	Name of organ of state

- 2.3 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**
- 2.3.1 If so, furnish particulars:

.....

.....

.....

- 2.4 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**

2.4.1 If so, indicate all companies registered in the CSD in the table below:

Supplier registration number (MAAA)	Status (active/inactive/deleted)

Failure to disclose all CSD-registered active companies linked to all Directors will lead to disqualification.

3 GENERAL DECLARATION

I,, the undersigned, 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 to be false.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.
- 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.
- 3.5 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.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring 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.
- 3.7 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, 1998 (Act No. 89 of 1998) and or may

be referred to law enforcement agencies for criminal investigation and or may be restricted from conducting business with the state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004) or any other applicable legislation.

I CERTIFY THAT THE ABOVE IS CORRECT.

I ACCEPT THAT THE PROCURING INSTITUTION MAY REJECT THE BID OR TAKE APPROPRIATE ACTION AGAINST ME IF THIS DECLARATION IS FALSE.

.....

Signature

.....

Date

.....

Designation

.....

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**
- a) The applicable preference point system for this tender is the 80/20 preference point system.
- 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:
- | | POINTS |
|--|------------|
| PRICE | 80 |
| SPECIFIC GOALS | 20 |
| Total points for Price and SPECIFIC GOALS | 100 |
- 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 regarding 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:

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest 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)
100% black ownership.	20	

REQUIRED PROOF.

1. CSD report not older than two (2) month showing ownership details.
2. Company Registration document
3. ID copy of director(s)

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.

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	

CONTRACT FORM - PURCHASE OF GOODS/WORKS

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SUCCESSFUL BIDDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SUCCESSFUL BIDDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE BIDDER)

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to (name of institution)..... in accordance with the requirements and specifications stipulated in bid number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.

2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Proof of tax compliance status;
 - Pricing schedule(s);
 - Technical Specification(s);
 - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
 - Bidder's Disclosure form;
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)

3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.

5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.

6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE



INGONYAMA TRUST BOARD HEREBY INVITES INTERESTED SERVICE PROVIDERS TO QUOTE FOR THE SUPPORT OF INGONYAMA TRUST IN BUDGET REFORM AND IMPLEMENTATION OF SCOA:

BID NUMBER: ITB/14/10/2026

CLOSING DATE: 30/10/2026 @15:00PM

TERMS OF REFERENCE

1. BACKGROUND

- 1.1 Ingonyama Trust intends to undertake a comprehensive reform of its budgeting process and system, building on the Standard Chart of Accounts (SCOA) training and implementation support undertaken in September 2026.
- 1.2 The September 2026 ITCOA.01 Architecture Closeout Report records a two-day practical intervention covering the SCOA framework, review of the existing Chart of Accounts, identification of gaps, account mapping, transaction allocation, budget and reporting alignment, and implementation planning. The work established ITCOA.01 as the initial financial information architecture, supported by mapping, Trial Balance allocation, Account Pool documentation and implementation and governance material.
- 1.3 The closeout report identifies ITCOA.01 as a working architectural baseline requiring subsequent business-process testing, budget testing and refinement before formal approval of the operational Chart of Accounts. The budget reform is therefore required to translate the September training and initial architecture into an integrated, practical budgeting process that aligns strategy and resource allocation with transaction classification, the General Ledger (GL), financial reporting and performance accountability.
- 1.4 A key issue is that there is currently no sufficiently direct relationship between the budget and the GL. The reform should enable the budget to serve as both a financial plan and an effective management and accountability instrument.
- 1.5 The reform will consider four dimensions of financial information: Responsibility, Objective, Funding and Item.
- 1.6 Ingonyama Trust has internal capacity to undertake elements of technical development. The

appointed service provider will therefore work collaboratively with Trust officials through the complete reform process, using the September 2026 training outputs and ITCoA.01 as the starting point.

2. OBJECTIVES OF THE ASSIGNMENT

2.1 Support Ingonyama Trust in undergoing a complete budget reform that improves:

- strategic alignment of the budget
- financial planning and resource allocation
- linkage between the budget and accounting records
- budget execution and monitoring
- management decision-making
- financial accountability
- demonstration of how entrusted resources are used to achieve Ingonyama Trust objective

2.2 The assignment must result in an operationally improved budgeting process and system, supported by the necessary policies, structures, classifications, tools and reporting arrangements.

3. SCOPE OF WORK

3.1 Current Budget Assessment

Assess the current budgeting process and its relationship with strategy, financial management, GL, financial reporting, cash flow and performance management. Use the September 2026 SCOA training outputs and ITCoA.01 Architecture Closeout Report as the diagnostic baseline.

3.2 Budget Reform Design

Work with Ingonyama Trust to define the required future-state budget process, architecture, roles, controls and information requirements.

3.3 Strategic and Financial Planning

Strengthen the connection between the Trust's strategic priorities, programmes, responsibilities and resource allocation.

3.4 Revenue, Expenditure, Capital and Funding

Support reform of the processes through which Ingonyama Trust develops and manages revenue, operating expenditure, capital investment, funding and cash flow.

3.5 Budget Classification and Financial Information

Review and refine the four-dimensional structure – Responsibility, Objective, Funding, Item - and its relationship with the Chart of Accounts, GL and AFS. Build on the initial ITCoA.01

architecture and validate the proposed classifications against budget and reporting needs.

3.6 Budget Development and Monitoring

Strengthen preparation, consolidation, approval, monitoring, budget-versus-actual analysis and variance management.

3.7 Budgeting Tools and Templates

Work with Ingonyama Trust to refine or develop the tools, templates and supporting processes required to implement the reformed budget.

3.8 Budget-to-GL-to-AFS Integration

Establish a practical relationship between budget classifications and accounting information to improve traceability and financial reporting.

3.9 Accountability and Performance

Ensure the reformed budget provides meaningful information on what Ingonyama Trust plans to do, resources allocated, what is spent vs what is achieved.

3.10 Annual Budget

Support Ingonyama Trust in translating the reformed process into a concise annual budget communicating priorities, resource allocation, expenditure, investment, funding and financial position.

3.11 Testing and Refinement

Apply the reformed approach using actual Ingonyama Trust information, identify weaknesses and refine the process with Ingonyama Trust officials. Incorporate the business process and budget testing envisaged in the September closeout report, documenting refinements and approval requirements.

3.12 Handover and Institutionalization

Support Ingonyama Trust in embedding the reformed approach within its normal budgeting cycle, including documentation, roles, procedures and implementation arrangements.

4. EXPECTED OUTCOMES

4.1 The assignment should leave Ingonyama Trust with:

- a reformed and integrated budget process
- a clear relationship between strategy, budget, accounting and financial reporting
- improved budget preparation, resource allocation, monitoring and variance management
- an appropriate budget classification structure and improved budget-to-GL linkage
- practical budgeting tools and templates
- improved financial and management information

- clearer accountability for resources
- an annual budget understandable to management and oversight stakeholders

4.2 The assignment should not result merely in a conceptual report. The reform must be undertaken collaboratively with Ingonyama Trust and translated into practical, usable arrangements.

5. DURATION

5.1 Four (4) consecutive weeks / twenty (20) working days. The period will comprise an intensive collaborative reform process involving the appointed service provider and designated Ingonyama Trust officials.

6. REQUIRED CAPABILITIES

6.1 Relevant experience in budget reform, financial management, organisational performance and accountability, including:

- public-sector or institutional budgeting
- financial information architecture and Chart of Accounts
- General Ledger and financial reporting
- budget-to-actual monitoring
- financial planning and modelling
- budget process redesign
- financial management systems and tools

6.2 Experience in end-to-end budget reform, rather than only budget preparation or training, will be relevant.

7. COMPLETE CRITICAL REQUIREMENT

7.1 Ingonyama Trust is seeking a partner to work with its internal team in undertaking a complete budget reform aimed at improving performance, financial management and accountability. The assignment is not intended to outsource the Trust's budgeting function or merely produce reports. The appointed service provider must work collaboratively with Ingonyama Trust officials to assess the current system, facilitate and support the reform, implement agreed improvements, test their effectiveness and support institutionalization of the reformed budget process within the twenty-working-day period.

EVALUATION CRITERIA

COMPLIANCE ASSESSMENT- EVALUATION CRITERIA

1.Phase one: Compulsory returnable documents

- a. Duly completed SBD document
- b. Company Profile
- c. Three (3) contactable references where the company has performed the same of similar assignments.
- d. Proposed reform methodology
- e. Four-week work plan
- f. Proposed team with their CV's (experience 3-5 years and above)
- g. Key outputs/outcomes
- h. Assumptions and Ingonyama Trust dependencies
- i. Financial Proposal
- j. CSD document not older than two (2) months from the closing date of quotation
- k. Valid Tax Compliant Status Pin issued by the South African Revenue Service.
- l. Company Registration Documents

Failure to comply with the above requirements will result in disqualification, and the quotation will not be considered for further evaluation.

2.Phase two: Pricing and specific goals (80/20 point system)

During this process the service provider will be evaluated on the 80/20 Preference Point system:

Price Points	Specific Goals (20)	Total Points
	100% Black ownership	
80	20	100

SUBMITTING OF QUOTATION:

- Prospective suppliers must be registered on Central Supplier Database.
- Quotation must be emailed to melody.ngubo@ingonyamatrust.org.za
- No late quotation after closing date and time will be accepted.