

UMSOBOMVU

MUNISIPALITEIT

MUNICIPALITY



BID 2/5/2013

**GENERAL VALUATION FOR
2014/15 – 2017/18
AND
VALUATION ROLL
MAINTENANCE
FOR
2015/16 TO 2017/18**

UMSOBOMVU MUNICIPALITY

Bid 2/5/2013

Compilation of Valuation Roll 2014 to 2017 and Valuation Roll Maintenance 2014/15 to 2017/18

1. Bids are herewith invited from suitably qualified Service Providers for the abovementioned bids.
2. Sealed bids, endorsed with the corresponding bid description and number: “**BID No. 3/5/2013: GENERAL VALUATION FOR 2014/15 – 2017/18 AND VALUATION ROLL MAINTENANCE FOR 2015/16 TO 2017/18**” must be placed in the Bid Box at the offices of Umsobomvu Municipality, 21 A Church Street, Colesberg. Postal and hand deliveries must reach Umsobomvu Municipality not later than 12:00 on Friday 31 May 2013 being the closing date and time, after which the proposals will be opened in public.
3. Late, incomplete, electronic or telegraphic proposals will not be considered. The client reserves the right not to accept the highest or lowest or any proposal, and has the right to accept only part of a proposal. No reason for the rejection of a proposal shall be provided and the client shall not enter into any correspondence regarding this.
4. All proposals will be adjudicated and awarded in terms of the Umsobomvu Procurement and Supply Chain Management Policy, the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and the Regulations promulgated under this Act, value for money and capability.
5. The Bid will be adjudicated on the 90/10 points system (90 points = price and 10 points = preference).
6. Interested service providers who wish to claim preferential points must attach to their proposal certified evidence of B-BBEE status level issued by a registered verification agency.
7. Declaration of Interest forms are available on the web-site (www.umsobomvumun.co.za) which must be filled out and submitted with the bid.
8. Bidders must supply with their bid the following documentation and or information:
 - 8.1 A valid original Tax Clearance certificate;
 - 8.2 A company profile, with C.V's of personnel who will be actively involved in the execution of the work;
 - 8.3 Proof of good standing with their local authority in respect of service charges;
9. Bid documents for Bid 2/5/2013 will be available as from 13 May 2013 at a non-refundable deposit of **R 300.00** payable in cash or by bank guaranteed cheque made out in favour of the employer is required on collection of the document. The bid document and information on Bids 2/5/2013 can be obtained from the Chief of Administration, Mr. B.J. Kapp (e-mail: birtus@umsobomvumun.co.za) or at (051) 7530777. A compulsory briefing session will be held at the offices of the employer on 17 May 2013 at 11:00 at the offices of the municipality, 21A Church Street, Colesberg. In the event that a Joint Venture intends to submit a bid, only one party to the Joint Venture is required to attend the briefing session.
10. All bids should hold good for 90 days from closing date.
11. These bids are subject to the General Conditions of Contract or any Special Conditions of Contract.

Mr. A.C. Mpela
Umsobomvu Municipality

Private Bag X6
COLESBERG
9795

Notice No. 18/2013

Date: 6 May 2013

UMSOBOMVU MUNICIPALITY

BID DOCUMENTATION

BID NUMBER: 2/5/2013

GENERAL VALUATION FOR IMPLEMENTATION 1 JULY 2014 AND
VALUATION ROLL MAINTENANCE FOR 1 JULY 2015 TO
30 JUNE 2018

NAME OF BIDDER:

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SECTION A

SUMMARY OF BID AND ENQUIRIES

THIS BID CLOSES AT	12h00
CLOSING DATE	31 May 2013
BID NUMBER	2/5/2013
DESCRIPTION	GENERAL VALUATION FOR IMPLEMENTATION 1 JULY 2014 AND VALUATION ROLL MAINTENANCE FOR 1 JULY 2015 TO 30 JUNE 2018
CONTRACT PERIODS	<u>Phase 1</u> Delivery of certified General Valuation Roll from the effective date of the Memorandum of Agreement signed with the Service Provider to reach the employer on 31 January 2014; and <u>Phase 2</u> Valuation roll maintenance from 1 July 2015 to 30 June 2018, based on a valuation date of 1 July 2014
VALIDITY PERIOD	90 DAYS
NAME OF BIDDER	_____
BID ENQUIRIES	B. J. Kapp – Chief Administration – Umsobomvu Municipality
TELEPHONE NUMBER	051-7530777
BID SPECIFICATION ENQUIRIES	B. J. Kapp
TELEPHONE NUMBER	051 - 7530777

SECTION B
CONDITIONS OF BID

1.
herewith bid to supply all the services described in the Bid Specification Document to the Umsobomvu Municipality.

2. Agrees as following:
 - (a) The bid price will remain valid for a period of 90 days calculated from the closing time of the bid;
 - (b) The offer shall be open for acceptance by the Umsobomvu Municipality during the 90 Days;
 - (c) This bid and its acceptance shall be subject to the Local Government: Municipal Finance Management Act, 2003 (Act No. 56 of 2003), the Preferential Procurement Act and the Regulations promulgated in terms of the Act, the Umsobomvu Municipality's Supply Chain Management policy, the General Conditions of Contract and or Special Conditions of Contract and the agreement between the Service Provider and the Umsobomvu Municipality;
 - (d) If the bid is withdraw within the period of validity, the bid shall remain open for acceptance, or if the bidder fails to fulfill the contract when called upon to do so, the Umsobomvu Municipality may, without prejudice to its other rights, agree to the withdrawal of my bid or cancel the contract that may have been entered into between the bidder and the Umsobomvu Municipality.
 - (e) If the bidder withdraws the bid within the period for which the bid is regarded as open for acceptance, the bid shall remain open for acceptance, the bidder shall pay the Umsobomvu Municipality any additional expenses incurred by the Umsobomvu Municipality having either to accept a less favorable bid or, if fresh bids have to be invited, the additional expenditure incurred by the invitation of fresh bids.
 - (f) The Umsobomvu Municipality has the right to recover additional expenditure incurred by the invitation of fresh bids from monies which may be due to The bidder under this or any other bid;
 - (g) If the bidder's bid is accepted, the acceptance may be communicated to the bidder by registered post, and the South African Post Office Limited shall be treated as delivery agent to the bidder; and
 - (h)The laws of the Republic of South Africa shall govern the contract created by the acceptance of the bidder's bid and choose *domicilium citandi et executandi* in the Republic at (full physical address):.....
.....

3. The bidder confirms that he/she satisfied himself/herself as to the correctness and validity of the bid: that the prices, rates and preference quoted cover all of the items

and the bidder's obligations under a resulting contract, and the bidder accepts that any mistakes regarding the prices and calculations will be at the bidder's risk.

4. The bidder hereby accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement, as the Principals liable for the due fulfilment of this contract.
5. The bidder agrees that any action arising from this contract may in all respects be instituted against the bidder the bidder hereby undertake to satisfy fully any sentence or judgement which may be pronounced against the bidder as a result of such action.
6. The bidder confirms that he/she has declared all and any interest that or any persons related to the bidder's business has with regard to this bid or any related bids by completion of the Declaration of Interest Section.
7. The bidder confirms that a certified Valuation Roll will be submitted to the Umsobomvu Municipality on or before 31 January 2014, failing which the employer will impose a penalty of R5 000.00 per day.

NAME OF DECLARANT

NAME OF BIDDER

SIGNATURE OF DECLARANT

DATE

SECTION C

INSTRUCTIONS FOR COMPLETION AND SUBMISSION OF BID

1. The bid must be complete in all respects.
2. Bid forms may not be retyped or redrafted. Photocopies of the original bid documentation may be used, but an original signature must appear on the photocopies.
3. A Bidder is advised to check the number of pages and to ensure that no pages are missing or duplicated.
4. No qualifications of a bid will be allowed. A bid that contains conditions that differ from the official bid form will be rejected.
5. Any alteration made by the Bidder must be initialed.
6. Use of correcting fluid is prohibited
7. A bid must be addressed in accordance with the directives in the bid documents and must be lodged in a separate sealed envelope, with the name and address of the Bidder, the bid number and closing date indicated on the envelope. The envelope may not contain documents relating to any bid other than that shown on the envelope. A bid contained in an envelope that does contain documents relating to another bid will be rejected.
8. Bidding documents must not be included in packages containing samples. Bids included in packages containing samples may be rejected.
9. All bids received in sealed envelopes will be kept unopened in safe custody until the closing time of the bids. If a bid is received open, it will be sealed. If it is received without a bid number on the envelope, it will be opened, the bid number ascertained, the envelope sealed and the bid number written on the envelope.
10. A box is provided for the receipt of bids at the offices of Umsobomvu Municipality, 21A Church Street, Colesberg. A bid found elsewhere subsequent to the closing date and time of bid will be rejected.
11. The delivery and acceptance of Bids must be in terms of the Umsobomvu Municipality's Supply Chain Management policy and a bid will only be accepted if delivered by Hand or by Post. If a bid is sent through the post it will be rejected if it is received after the closing date and time stipulated in the bid documentation. Proof of posting will not be accepted as proof of delivery.
12. Late bids will be rejected.
13. A bid submitted by fax, telegraphic or other electronic means will be rejected.
14. Bids will be opened in public at Umsobomvu Municipality, immediately after closing.
15. Where practical, prices are made public at the time of opening bids.
16. The Umsobomvu Municipality is not compelled to accept the lowest or any bid.

SECTION D

INSTRUCTIONS FOR COMPLETION OF AN ENVELOPE FOR QUOTATION

Envelopes that are not addressed correctly will be rejected. The correct manner in which envelopes must be addressed is as following:

EXAMPLE FORMAT

FRONT SIDE OF ENVELOPE	
Name and address of bidder:
Bid Number:
Description:	GENERAL VALUATION FOR 2014-2017 AND VALUATION ROLL MAINTENANCE FOR 2014 TO 2017
Closing date:	31 May 2013
Closing time:	12h00

REVERSE SIDE OF ENVELOPE	
Municipality's details and address:	
The Municipal Manager Umsobomvu Municipality 21A Church Street COLESBERG 9795	

SECTION E

INSTRUCTIONS FOR DELIVERY OF BID

1. DOCUMENTS DELIVERED BY HAND MUST BE DEPOSITED IN THE BID BOX SITUATED IN:

The Bid Box: Umsobomvu Municipality, 21A Church Street Colesberg, 9795	Availability of Bid Box: Office Hours: Mondays to Fridays: 07:45 to 16:30
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2. DOCUMENTS DELIVERED BY MAIL

Documents posted must be addressed to:

The Municipal Manager
Umsobomvu Municipality
Private Bag X6
COLESBERG
9795

N.B.: The post is cleared from Colesberg Post Office before 09:00 on the due date

SECTION G

COMPULSORILY BRIEFING SESSION ATTENDANCE CERTIFICATE

1. This Section must be completed by the person who attended the compulsory briefing session on behalf of the Bidder.

2. In the event a Joint Venture intends to submit a bid, only one party to the Joint Venture is required to attend the briefing session.

3. This is to certify I have attended the compulsorily briefing session on behalf of the Bidder and that the Bidder is therefore familiar with the circumstances and the scope of the service to be rendered.

NAME OF DECLARANT

NAME OF BIDDER

SIGNATURE OF DECLARANT

DATE

NAME OF MUNICIPAL OFFICIAL

SIGNATURE OF MUNICIPAL OFFICIAL

DATE



MUNICIPAL OFFICIAL STAMP

SECTION H

COMPULSORY HUMAN RESOURCES, SYSTEMS AND DOCUMENTS REQUIRED TO QUALIFY AS A BIDDER

1. The Bidder must provide the following human resources, systems and documents in order to qualify as a Bidder.
2. Bids of Bidders who do not meet the minimum human resources or systems requirements or which are incomplete will be rejected.

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS AND DOCUMENTS	CRITERIA TO BE VERIFIED	YES/NO
SECTION B	Acceptance of Bid conditions	Acceptance of Bid conditions	
SECTION G	Compulsory briefing session attendance certificate	Compulsory briefing session	
SECTION I	Authority to sign Bid	Certified copy of resolution from the Bidder	
SECTION J	Municipal Valuer Where the Municipal Valuer is not in the full time employ of the Service Provider a copy of the Joint Venture agreement between the parties must be submitted with the bid	(a) 5 years of experience in performing the functions of a municipal valuer as contemplated in section 34 of the MPRA (b) Affidavit by a Municipal Valuer signed by Commissioner of Oaths (c) Certified copy of South African council for the Property Valuers Profession registration certificate.	
SECTION K	Assistant Municipal Valuer	(a) Affidavit by an Assistant Municipal Valuer signed by a Commissioner of Oaths (b) Certified copy of South African council for the Property Valuers Profession registration certificate.	
SECTION L	GIS and Data Manager	(a) 3 years experience in GIS and data management (b) Affidavit by the nominated GIS and Data Manager signed by a Commissioner of Oaths	
SECTION M	Project Manager	(a) 3 years experience in project management (b) Affidavit by the nominated Project Manager signed by a Commissioner of Oaths	
SECTION N	Pricing Schedule and Project Work Program	Pricing and milestones	
SECTION O	Certificate of compliant computer hardware, software and information technology systems	Compliant computer hardware, software and information technology systems	
SECTION P	Declaration of interest	Conflict of interest	

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS AND DOCUMENTS	CRITERIA TO BE VERIFIED	YES/NO
SECTION Q	Original tax clearance certificate	Tax Clearance Certificate	
SECTION R	Declaration with regard to B-BBEE contribution level	To verify submitted documents	
SECTION S	Declaration of Bidder's past supply chain management practices	Sound supply chain management	
SECTION T	Correctness of information supplied	Correctness of information supplied	
SECTION U	Contact details of Bidder	Contact details of Bidder	

SECTION I

AUTHORITY TO SIGN A BID

A. SOLE PROPRIETOR (ONE - PERSON BUSINESS)

confirms that I am the sole owner of the business trading as

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

B. COMPANY

A certified copy of the resolution by the board of directors, personally signed by the chairperson of the board, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid or the contract on behalf of the company must accompany the bid.

AUTHORITY BY BOARD OF DIRECTORS

I have been duly authorised by the Board of Directors to sign all documents in connection with this bid on behalf of..... in my capacity as, as per resolution,dated

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

C. CLOSE CORPORATION

A certified copy of the Founding Statement of the Close Corporation must be included with the bid, together with the resolution by its members authorising a member or other official of the Close Corporation to sign the documents on their behalf.

AUTHORITY BY CLOSE CORPORATION

I have been duly authorised by the members of to sign all documents in connection with this bid on behalf of, as per resolution,dated.....

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

**D.
PARTNERSHIP**

We, the undersigned partners in the business trading as authorise to sign this bid as well as any contract resulting from the bid and any other documents and correspondence in connection with this bid or contract on behalf of

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

NAME OF PARTNER 2

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

NAME OF PARTNER 1: _____

RESIDENTIAL ADDRESS: _____

NAME OF PARTNER 2: _____

RESIDENTIAL ADDRESS: _____

E. CO-OPERATIVE

A certified copy of the Constitution of the co-operative must be included with the bid, together with the resolution by its members authoring a member or other official of the co-operative to sign the bid documents on their behalf.

AUTHORITY BY CO-PERATIVE

I have been duly authorised by the members of to sign all documents in connection with this bid on behalf of, as per resolution, dated

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

F. JOINT VENTURE

A certified copy of the agreement reached signed by the duly authorised representatives of the enterprises, authorising the representatives who sign this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and contract on behalf of the joint venture must be submitted with this bid.

AUTHORITY BY JOINT VENTURE

I have been duly authorised by the members of to sign all documents in connection with this bid on behalf of, as per resolution dated

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

G. CONSORTIUM

A certified copy of the agreement reached signed by the duly authorised representatives of the enterprises, authorising the representatives who sign this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and contract on behalf of the joint venture must be submitted with this bid.

AUTHORITY BY CONSORTIUM

I have been duly authorised by the members of to sign all documents in connection with this bid on behalf of, as per resolution, dated

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

SECTION J

AFFIDAVIT, NOMINATION AND DECLARATION OF MUNICIPAL VALUER

1. INSTRUCTIONS

(1) This Section must be completed by the nominated Municipal Valuer.

(2) A certificate of professional registration must be attached to the Bid.

(3) In terms of section 4(5) of the MPRA, a Municipal Valuer may not perform the valuation of a property in which that valuer, or any spouse, parent, child, partner or business associate of the valuer has a personal or private business interest, and the Municipal Manager must designate a special valuer to perform that valuation. The Municipal Valuer must declare any property interests in terms of section 43(5) of the MPRA and submit it with the Bid.

2. PERSONAL DETAILS

Full names _____

I.D. number _____

Professional qualifications _____

Professional registration No. _____

Years of experience in
municipal valuation _____

3. WORK EXPERIENCE: MUNICIPAL VALUATIONS (1)

List previous experience (Use separate page if insufficient – duplicate this page for each municipality).

Name of municipality	_____
Period of valuation roll	_____
No. of properties in roll	_____
Reference	_____
Contact number	_____

(2) List properties included in any of the valuation rolls compiled by you of a special nature or requiring specific skills, i.e. airport, mines, quarries. etc.

Name of municipality	_____
Description of property	_____
Type of property	_____
Method of valuation	_____

(3) Have you compiled any valuation rolls utilising GIS and aerial photography?

YES/NO

If "YES", state particulars

Name of municipality	_____
Period of valuation roll	_____
Reference	_____
Contact number	_____

(4) Have you had any experience in reconciling cadastral data with deeds data and thereafter with the municipal valuation roll? If yes, provide full details.

YES/ NO

If "YES", state particulars

Name of municipality _____

Period of valuation roll _____

Reference _____

Contact number _____

(5) Have you appeared in front of a valuation boards in terms of previous legislation or the Valuation Appeal Board?

YES/ NO

If "YES", state particulars

Name of municipality _____

Period of valuation roll _____

No. of appeals upheld _____

No. of appeals dismissed _____

Contact number _____

4. PREVIOUS DISQUALIFICATION

(1) Have you ever been disqualified as a valuer?

YES/NO

If "YES", state particulars

(2) Have you been summoned to appear at any disciplinary hearing of either the South African Institute of Valuers or South African Council for the Property Valuers Profession or other recognized professional bodies relating to the valuation profession?

YES/NO

If "YES", state particulars

5. DECLARATION

(1) I hereby make oath and say that:

- (a) this questionnaire was completed by me in full;
- (b) I have not withheld any information in regard to the completion of this questionnaire; and
- (c) and all information supplied by me is true and correct.

(2) I do further declare that I have read all the Bid documents including the Tender Specification Document, the Bid Quotation Document, and the Draft Agreement and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

(3) I further undertake by my signature hereof (if I am not the Bidder) to bind myself jointly and severally with the Bidder to fulfil all obligations and requirements of this Bid.

(4) I hereby agree to my nomination as Municipal Valuer for the Umsobomvu Municipality for the period 2014 to 2015 and will abide by professional ethics, professional valuation standards of the South African Council for the Property Valuers Profession established in terms of section 2 of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000).

Signed by me at this day of..... 20.....

NAME MUNICIPAL VALUER

NAME OF BIDDER

SIGNATURE MUNICIPAL VALUER

DATE

WITNESS 1

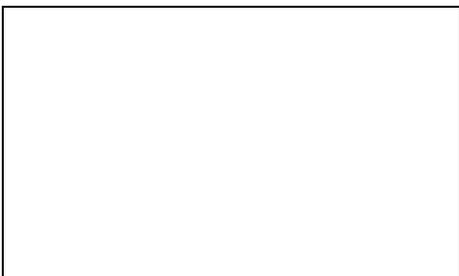
WITNESS 2

JUSTICE OF PEACE OR COMMISSIONER OF OATHS

I hereby certify that the deponent has acknowledged that he or she knows and understands the contents of this affidavit and that it was signed and sworn to before me at this day of..... 20.....

JUSTICE OF PEACE OR COMMISSIONER OF OATHS

TO BE STAMPED BY JUSTICE OF PEACE OR COMMISSIONER OF OATHS



OFFICIAL STAMP

SECTION K

AFFIDAVIT, NOMINATION AND DECLARATION OF ASSISTANT MUNICIPAL VALUER

1. INSTRUCTIONS

(1) This Section must be completed by the nominated Assistant Municipal Valuer.

(2) A certificate of professional registration must be attached to the Bid.

(3) In terms of section 4(5) of the MPRA, a Assistant Municipal Valuer may not perform the valuation of a property in which that valuer, or any spouse, parent, child, partner or business associate of the valuer has a personal or private business interest, and the Municipal Manager must designate a special valuer to perform that valuation. The Assistant Municipal Valuer must declare any property interests in terms of section 43(5) of the MPRA and submit it with the Bid.

2. PERSONAL DETAILS

Full names _____

I.D. number _____

Professional qualifications _____

Professional registration No. _____

Years of experience in
municipal valuation _____

3. WORK EXPERIENCE: MUNICIPAL VALUATIONS

(1) List previous experience.

Name of municipality _____

Period of valuation roll _____

No. of properties in roll _____

Reference _____

Contact number _____

(2) List properties included in any of the valuation rolls compiled by you of a special nature or requiring specific skills, i.e. airport, mines, quarries. etc.

Name of municipality _____
Description of property _____
Type of property _____
Method of valuation _____

(3) Have you compiled any valuation rolls utilising GIS and aerial photography?

YES / NO

If "YES", state particulars

Name of municipality _____
Period of valuation roll _____
Reference _____
Contact number _____

(4) Have you had any experience in reconciling cadastre data with deeds data and thereafter with the municipal valuation roll? If yes, provide full details.

YES / NO

If "YES", state particulars

Name of municipality _____
Period of valuation roll _____
Reference _____
Contact number _____

(5) Have you appeared in front of a valuation boards in terms of previous legislation or the Valuation Appeal Board?

YES/ NO

If "YES", state particulars

Name of municipality _____

Period of valuation roll _____

No. of appeals upheld _____

No. of appeals dismissed _____

Contact number _____

4. PREVIOUS DISQUALIFICATION

(1) Have you ever been disqualified as a valuer?

YES/NO

If "YES", state particulars

(2) Have you been summoned to appear at any disciplinary hearing of either the South African Institute of Valuers or South African Council for the Property Valuers Profession or other recognized professional bodies relating to the valuation profession?

YES/NO

If "YES", state particulars

5. DECLARATION

(1) I hereby make oath and say that:

- (a) this questionnaire was completed by me in full;
- (b) I have not withheld any information in regard to the completion of this questionnaire; and
- (c) and all information supplied by me is true and correct.

(2) I do further declare that I have read all the Bid documents including the Tender Specification Document, the Bid Quotation Document, and the Draft Agreement and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

(3) I hereby agree to my nomination as Municipal Valuer for the Umsobomvu Municipality for the period 2014 to 2017 and will abide by professional ethics, professional valuation standards of the South African Council for the Property Valuers Profession established in terms of section 2 of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000).

Signed by me at this day of 20.....

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

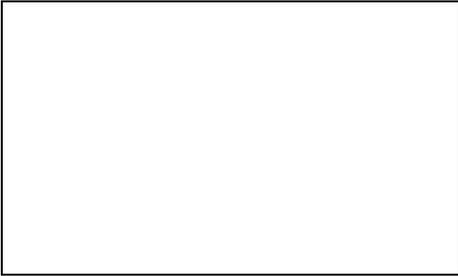
WITNESS 2

JUSTICE OF PEACE OR COMMISSIONER OF OATHS

I hereby certify that the deponent has acknowledged that he or she knows and understands the contents of this affidavit and that it was signed and sworn to before me at this day of..... 20.....

JUSTICE OF PEACE OR COMMISSIONER OF OATHS

TO BE STAMPED BY JUSTICE OF PEACE OR COMMISSIONER OF OATHS



OFFICIAL STAMP

SECTION L

AFFIDAVIT, NOMINATION AND DECLARATION OF GIS AND DATA MANAGER

1. INSTRUCTIONS

This Section must be completed by the nominated GIS and Data Manager.

2. PERSONAL DETAILS

Full names _____

I.D. number _____

Professional qualifications _____

Professional registration No. _____

Years of experience in
GIS _____

3. WORK EXPERIENCE:

4. DECLARATION

(1) I hereby make oath and say that:

- (a) this questionnaire was completed by me in full;
- (b) I have not withheld any information in regard to the completion of this questionnaire; and
- (c) and all information supplied by me is true and correct.

(2) I do further declare that I have read all the Bid documents including the Tender Specification Document, the Bid Quotation Document, and the Draft Agreement and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

(4) I hereby agree to my nomination as Municipal Valuer for the Umsobomvu Municipality for the period 2014 to 2015 and will abide by professional ethics, professional valuation standards of the South African Council for Professional and Technical Surveyors established in terms of section 2 of the Professional And Technical Surveyors' Act, 1984 (Act No. 40 of 1984).

Signed by me atthis day of 20

**NAME ASSISTANT
MUNICIPAL VALUER**

NAME OF BIDDER

**SIGNATURE ASSISTANT
MUNICIPAL VALUER**

DATE

WITNESS 1

WITNESS 2

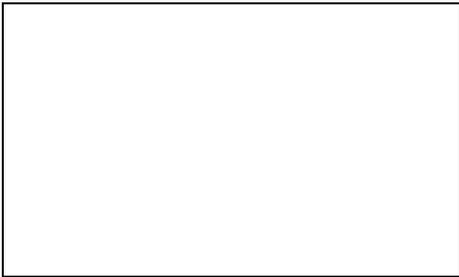
JUSTICE OF PEACE OR COMMISSIONER OF OATHS

I hereby certify that the deponent has acknowledged that he or she knows and understands the contents of this affidavit and that it was signed and sworn to before me

At this day of 20.....

JUSTICE OF PEACE OR COMMISSIONER OF OATHS

TO BE STAMPED BY JUSTICE OF PEACE OR COMMISSIONER OF OATHS



OFFICIAL STAMP

SECTION M

AFFIDAVIT, NOMINATION AND DECLARATION OF PROJECT MANAGER

1. INSTRUCTIONS

(1) This Section must be completed by the nominated Project Manager.

(2) A certificate of professional registration (if any) must be attached to the Bid.

2. PERSONAL DETAILS

Full names _____

I.D. number _____

Professional qualifications _____

Professional registration No. _____

Years of experience in
Project Management _____

3. WORK EXPERIENCE:

4. DECLARATION

(1) I hereby make oath and say that:

- (a) this questionnaire was completed by me in full;
- (b) I have not withheld any information in regard to the completion of this questionnaire; and
- (c) and all information supplied by me is true and correct.

(2) I do further declare that I have read all the Bid documents including the Tender Specification Document, the Bid Quotation Document, and the Draft Agreement and confirm that I have fully acquainted myself with the terms and conditions thereof and fully understand the content and implication of all such conditions.

(4) I hereby agree to my nomination as Municipal Valuer for the Umsobomvu Municipality for the period 2014 to 2015.

S n m e

**NAME ASSISTANT
MUNICIPAL VALUER**

NAME OF BIDDER

**SIGNATURE ASSISTANT
MUNICIPAL VALUER**

DATE

WITNESS 1

WITNESS 2

JUSTICE OF PEACE OR COMMISSIONER OF OATHS

I hereby certify that the deponent has acknowledged that he or she knows and understands the contents of this affidavit and that it was signed and sworn to before me

At this day of 20.....

JUSTICE OF PEACE OR COMMISSIONER OF OATHS

TO BE STAMPED BY JUSTICE OF PEACE OR COMMISSIONER OF OATHS



OFFICIAL STAMP

SECTION N

PRICING SCHEDULE AND PROJECT WORK PROGRAMME

1. The Bidder must attach a Pricing Schedule in accordance with the **table 1** below and the cost of the Bid is to be inserted under "**GRAND TOTAL COST OF BID**" which will be the full and final Bid price. The pricing must take cognisance of Annexure "A" of the Bid Specification document regarding the data and information available from the municipality.

2. The Bidder must attach a priced Project Work Programme with realistic time frames in accordance with **table 2** below and the total price must be the same as the final Bid price reflected under "**GRAND TOTAL COST OF BID**" (see also clause 3 of the Bid Specification Documentation).

3. The Project Work Program and cash flow will be finalized with the Bidder, if the Bidder is appointed as Service Provider.

TABLE 1: PRICING SCHEDULE PER ITEM AND QUANTITY

PART A: SCHEDULE OF PER FIXED AMOUNTS: PHASE ONE GENERAL VALUATION BID					
NO	DESCRIPTION	UNIT	QUANTITY	BID RATE INCL VAT	BID AMOUNT INCL VAT
1	Project Management Function				
1.1	Project Management Function	Fixed cost item	1		
2	Project Office & Project Establishment				
2.1	Draft & Finalize Project Contract, Project Program and Project Cash Flow Plan	Fixed cost item	1		
2.2	Finalize Sub-Contract Agreements	Fixed cost item	1		
2.3	Establish Project Office and Infrastructure	Fixed cost item	1		
2.4	Project Office Overheads	Fixed cost item	1		
2.5	Project Office IT Infrastructure Cost	Fixed cost item	1		
3	Valuation Roll Management System (VRMS)				
3.1	Valuation Roll Management System - confirmed MPRA complaint, installed and usable	Fixed cost item	1		
3.2	Valuation Roll Management System – confirmed integration with Municipal financial system	Fixed cost item	1		
3.3	VRMS Service Level Agreement signed for general valuation and valuation roll maintenance	Fixed cost item	1		
3.4	Valuation Roll Management System phase one: First year license fee	Fixed cost item	1		
4	Property Register creation				
4.1	Identify data sources	Fixed cost item	1		
4.2	Acquire, clean and prepare date (in addition to 4.3 and 4.4 below)	Fixed cost item	1		
4.3	Deeds office date (ownership and sales data) extracts as per bid document and integration to VRMS	Fixed cost item	1		
4.4	Acquire aerial photography/imagery	Fixed cost item	1		
4.5	Prepare and create property register which shall comprise an electronic data base of all properties as per bid document	Fixed cost item	1		
4.6	Prepare and create GIS Property Register layer in ESRI shape file format aligned to the property register database as per bid document	Fixed cost item	1		
4.7	Property Register database and GIS property register mismatch and corrective action report	Fixed cost item	1		
5	Project Reports: Data Collection & Capture QA; Sales Review;				

	Market and Valuation Methodology Reports; Close out reports				
5.1	Residential Contract Sales Review; Market and Valuation Methodology Reports	Fixed cost item	1		
5.2	Non- Residential (includes Agric) Contract Sales Review; Market and Valuation Methodology Reports	Fixed cost item	1		
5.3	Data Collection and Capture Quality Assurance Report	Fixed cost item	1		
5.4	General Valuation Roll(GV) Close out report	Fixed cost item	1		
5.5	Objection processing close out reports: including count, value changes and GI spatial layer (including Year 1)	Fixed cost item	1		
5.6	Appeal processing close out reports: including count, value changes and GI spatial layer (including Year 1)	Fixed cost item	1		
5.7	Valuation Roll maintenance report: and per annum delivered in September of each year	Fixed cost item	3		
	SUB TOTAL (1.1 to 5.7)				

PART B: SCHEDULE OF PER ENTRY RATES: PHASE ONE GENERAL VALUATION BID

6	General Valuation (including communication with Property Owners, Data Collection; Valuation and Value Review	No.			
6.1	Farm Properties	No.			
6.2	Rural Communal Land including Trust Board land	No.			
6.3	National; Provincial and Municipal Public Service Infrastructure	No.			
6.4	Collection of Postal Addresses (Agricultural/PSI)	No.			
	Sub-Total (6.1 to 6.4)				
	Residential (6.5 to 6.12)				
6.5	Residential	No.			
6.6	Sectional title Residential (number of units)	No.			
6.7	Low Income Housing	No.			
6.8	Vacant Residential Land	No.			
6.9	Rural communal: households from Stats SA count – municipality to clarify if top structures are to be valued or not	No.			
6.10	Registered rights to extend (sectional title)	No.			
6.11	Registered exclusive use areas (sectional title)	No.			
6.12	Collection of Postal Addresses (Residential) rural communal Residential not required to be collected	No.			
	Sub-Total (6.5 to 6.12)				
	Non-Residential (6.13 to 6.18)				
6.13	General Business Properties	No.			
6.14	Industrial properties	No.			
6.15	Sectional Title Shops/offices/industrial properties	No.			
6.16	Vacant Commercial/Industrial/Business Land	No.			
6.17	Municipal owned properties other than municipal owned Public Service Infrastructure	No.			
6.18	Collection of Postal Addresses (Non-residential)	No.			
	Sub-Total (6.13 to 6.18)				
	Specialized Properties (6.19 to 6.56)				
6.19	Abattoirs	No.			
6.20	Airports/airfields	No.			
6.21	Casinos	No.			
6.22	Civic centre/Community Halls	No.			
6.23	Clinics	No.			
6.24	Creches	No.			
6.25	Golf Courses and Golf Estates	No.			
6.26	Grain Co-ops	No.			
6.27	Grain Depots	No.			
6.28	Heavy manufacturing/Engineering	No.			
6.29	Hospitals (Private & State)	No.			
6.30	Hotels, Resorts & conference Centres	No.			
6.31	Law Courts	No.			
6.32	Libraries	No.			
6.33	Military Bases	No.			
6.34	Mines	No.			
6.35	Old Age/Retirement Homes	No.			
6.36	Petrol Filling Stations	No.			
6.37	Places of Worship	No.			
6.38	Police Stations	No.			
6.39	Post Offices	No.			
6.40	Power Stations & Substations	No.			
6.41	Prisons	No.			
6.42	Quarries	No.			
6.43	Guest houses	No.			
6.44	Schools (Private & State)	No.			
6.45	Shopping Centres	No.			
6.46	Sports Facilities including Stadiums	No.			
6.47	Wind and Solar Farms	No.			

6.48	Vacant other land	No.			
6.49	Properties acquired through the Provision of Land and Assistance Act, 1993 or the Restitution of Land Rights Act, 1994; or which are subject to the Communal Property Association act, 1996. (LRB)	No.			
6.50	Formally Proclaimed Protected areas	No.			
6.51	Properties used for Eco Tourism	No.			
6.52	Properties on which National Monuments are Proclaimed	No.			
6.53	Boarding House	No.			
6.54	Registered rights to extend (sectional title)	No.			
6.55	Registered exclusive use areas (sectional title)	No.			
6.56	Collection of Postal Addresses (Special)	No.			
	Sub-Total (6. 19 to 6.56)				
	Rural Communal Non-Residential (6.57 to 6.75)				
6.57	Butchery	No.			
6.58	Churches	No.			
6.59	Factory Unit	No.			
6.60	Garage	No.			
6.61	Hair Salon	No.			
6.62	Hardware	No.			
6.63	Market	No.			
6.64	Post Boxes	No.			
6.65	Reservoir	No.			
6.66	Restaurant	No.			
6.67	Service Station	No.			
6.68	Shops	No.			
6.69	Tavern	No.			
6.70	Taxi Association	No.			
6.71	Tea Rooms	No.			
6.72	Schools	No.			
6.73	Traditional Courts	No.			
6.74	Workshops	No.			
6.75	Collection of Postal Addresses (Rural communal Non-Residential)	No.			
	Sub-Total (6.57 to 6.75)				
	GRAND TOTAL: PHASE ONE				
7	Supplementary valuation rolls, valuation roll maintenance and annual maintenance report				
7.1	Supplementary valuation rolls, valuation roll maintenance Year 2 (Second financial year)	Annual Fee			
7.2	Supplementary valuation rolls, valuation roll maintenance Year 3 (Third financial year)	Annual Fee			
7.3	Supplementary valuation rolls, valuation roll maintenance Year 4 (Fourth financial year)	Annual Fee			
	SUB-TOTAL: PHASE TWO (7.1 TO 7.3)				
	Valuation Roll Management System (VRMS)				
7.4	VRMS SLA Year 2 (Second Financial Year)	Annual Fee			
7.5	VRMS SLA Year 3 (Third Financial Year)	Annual Fee			
7.6	VRMS SLA Year 4 (Fourth Financial Year)	Annual Fee			
	SUB-TOTAL: PHASE TWO (7.4 TO 7.6)				
	GRAND TOTAL: PHASE TWO (7.1 TO 7.6)				
	GRAND TOTAL COST OF BID				
8	Communication: Assist with the MPRA Public Awareness & Communication process	Hourly Rate			
9	Communication: Assist with the preparation of Rates Policy and Bylaws at implementation and annual review	Hourly Rate			
10	Objections processing (Section 50, 51, 52 and 53)	Per Objection			
10.1	Consider, decide, amend valuation roll, notifications of outcomes and furnishing written reasons for the appeal board of value adjustments of more than 10% (Form A)	Per Objection			
10.2	Consider, decide, amend valuation roll, notifications of outcomes and furnishing written reasons for the appeal board of value adjustments of more than 10% (Form B) and close out report	Per Objection			
10.3	Consider, decide, amend valuation roll, notifications of outcomes and furnishing written reasons for the appeal board of value adjustments of more than 10% (Form B) and close out report	Per Objection			
10.4	Furnishing written reasons upon application by the objector/owner (section 53): Residential	Per Objection			
10.5	Furnishing written reasons upon application by the objector/owner (section 53): Non-Residential	Per Objection			
10.6	Furnishing written reasons upon application by the objector/owner (section 53): Agriculture	Per Objection			
11	Appeal processing (Section 54)				
11.1	Processing appeals as per Bid	Per Appeal			
11.2	Attendance at VAB Hearings/Reviews plus travelling time: Municipal Valuer and Assistant Municipal Valuer rates	Hourly Rate			
11.3	VAB disbursements: Travel re-imbursments	Rate / km			
12	Added Services				

12.1	Attending to Valuations outside of the scope of this Bid	State the basis of fees including VAT			
12.2	Attending to valuations and assisting the municipality in preparing an asset register for fixed property in terms of section 63 of the Municipal Finance Management Act 56 of 2003, GRAP and the asset management policy of the municipality.	Annual Fee (4 years)			

TABLE 2: PROJECT WORK PROGRAM – TO PRICE AND INCLUDE TIME FRAMES

TASK ID	PHASE ONE: DELIVERABLES AND WORK PROGRAM
1	PROJECT MANAGEMENT FUNCTION
1.1	Project Management Function: provide and manage a project plan for the implementation of the general valuation; manage and report on project deliverables and milestones; manage and report on project progress and project payments; attend Municipal steering committee meetings at least monthly; manage and report on project risk; manage daily, weekly and monthly data backups in terms of data management
2	PROJECT OFFICE & PROJECT ESTABLISHMENT
2.1	Draft & Finalize Project Contract (MOA), project program and project cash flow plan
2.2	Finalize Sub-Contract agreements
2.3	Establish Project office and infrastructure
2.4	Project Office Overheads
2.5	Project Office IT Infrastructure cost
3	VALUATION ROLL MANAGEMENT SYSTEM (VRMS)
3.1	Installation of the Valuation Roll Management System at Project Office: <ul style="list-style-type: none"> • VRMS installed and operational • VRMS Valuation of property • VRMS data import and export facility • VRMS editing and keeping record of editing facility • VRMS reporting facility • Ability to capture and store Deeds Office data • Integration VRMS with GIS • Manage objections and appeals procedure
3.2	Integration of Valuation Roll Management System with Municipal System
3.3	Signing of VRMS Service Level Agreement
3.4	Valuation Roll Management System (VRMS) Phase one: first year license fee
3.5	Hard Copy & Electronic Data Storage, Back-up and Retrieval Plan
3.6	Hard Copy & Electronic Data Storage, Back-up and Retrieval
4	PROPERTY REGISTER CREATION AND DELIVERY OF COMPONENTS
4.1	Identify data sources
4.2	Acquire, clean and prepare data (in addition to 4.3 and 4.4 below)
4.3	Deeds office data (ownership and sales data) extracts approved by municipal valuer and integrated to VRMS
4.4	Acquire aerial photography/imagery
4.5	Prepare and create Property Register which shall comprise an electronic data base of all properties as per bid document
4.6	Prepare and create GIS Property register layer in ESRI shape file format aligned to the property register database as per bid document
4.7	Report on conflict between GIS property register layer and property register database
5	PROJECT SALES REVIEW: MARKET AND VALUATION METHODOLOGY REPORTS
5.1	Residential Contact Sales Review, Market & Valuation methodology Reports (to be read with annexure D) : 1) Initial market report and (2) final market report <ul style="list-style-type: none"> • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Data collection and sales review forms
5.2	Non-Residential Contact Sales Review, Market & Valuation methodology Reports (to be read with annexure D) : 1) Initial market report and (2) final market report <ul style="list-style-type: none"> • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Building cost report for specialized properties • Data collection and sales review forms • Valuation templates
6	DATA COLLECTION RESIDENTIAL
6.1	Develop and submit Data Collection/Data Capture methodology including digitized footprint plan
6.2	Prepare & submit Data Collection and data capture training manuals & Data Collection forms per property type (to be read with annexure D)
6.3	Recruit and train data collectors
6.4	Collect / Verify and Capture Data (data, sketch, photos, etc) undertake quality assurance in terms of Bid document
6.5	Collect / Verify and Capture Postal Address Data
6.6	Quality assurance Data Review
6.7	Maintain data
7	RESIDENTIAL VALUATIONS
7.1	Generate Values (Draft Value per property/Draft Valuation Roll)

	<ul style="list-style-type: none"> CAMA models and mass valuation methodology
7.2	<p>Undertake Value Review and quality assurance</p> <ul style="list-style-type: none"> Identify anomalies Sales ratio study Report on final values which deviated by more than 10% from original draft values Adjust values where necessary
TASK ID	PHASE ONE: DELIVERABLES AND WORK PROGRAM
7.3	Value Finalization (Final value per property / Final valuation Roll)
8	DATA COLLECTION NON RESIDENTIAL
8.1	Develop and submit Data Collection methodology
8.2	Prepare & submit training manuals & Data Collection forms (to be read with annexure D)
8.3	Collect / Verify and Capture Data (data, sketch, photos, etc) undertake quality assurance in terms of Bid document
8.4	Collect / Verify and Capture Postal Address Data
8.5	Quality assurance Data Review
8.6	Maintain data
9	NON RESIDENTIAL VALUATIONS
9.1	Valuations (draft values)
9.2	<p>Undertake Value Review and quality assurance</p> <ul style="list-style-type: none"> Identify anomalies Report on final values which deviated by more than 10% from original draft values Adjust values where necessary
9.3	Value finalization and final CAMA models (Final Value per property / final valuation roll)
10	COMMUNICATIONS
10.1	Submit Public Awareness & Communication Plan
10.2	Assist with Implementation of the Public Awareness & Communication Plan
10.3	Assist in Rates Policy and Bylaw Review and Preparation in year of Implementation
11	VALUATION ROLL
11.1	Compile and print Final General Valuation Roll certified by the Municipal Valuer
11.2	Upload GV Roll and Objections forms to designated Website
11.3	Close out report - GV
12	OBJECTION/APPEALS MANAGEMENT
12.1	<p>Process objections GV</p> <ul style="list-style-type: none"> Record objections in database Respond in writing o objectors Consider objections and adjust value, if appropriate Make available sales evidence in support of decision upon request Provide written reasons for adjustments greater than 10% GIS cadastral layer of objections received with decisions and changes Notify objectors in writing of decision Provide written reasons to objectors for adjustment upon request from objectors
12.2	Report on objections
12.3	Close out report objections
12.4	<p>Process Appeals GV</p> <ul style="list-style-type: none"> Record appeals in database Make available sales evidence in support of decision upon request Represent the Municipality at Valuation appeal board hearings GIS cadastral layer of objections received with decisions and changes
12.5	Close out report appeals
13	SUPPLEMENTARY VALUATION ROLL/S (PHASE ONE)
13.1	<p>Compile Supplementary Roll/s Phase One</p> <ul style="list-style-type: none"> Investigate valuation queries Identify property omitted, newly included property, newly created property, substantial change in value of property, incorrectly valued property, property changing category Update ownership and particulars Approve supplementary valuations and updates to valuation roll Print Final Supplementary Valuation roll certified by the Municipal Valuer
13.2	Upload SVR 1 and Objection forms to designated website
13.3	Process objections
13.4	Report on objections
13.5	Process Appeals
13.6	Close out report on objections and appeals
14	PHASE TWO: VALUATION ROLL MAINTENANCE
14.1	Supplementary Valuation Year 2 (Second Financial Year)
14.2	Supplementary Valuation Year 3 (Third Financial Year)
14.3	Supplementary Valuation Year 4 (Fourth Financial Year)
14.4	VRMS SLA Year 2 (Second Financial Year)
14.5	VRMS SLA Year 3 (Third Financial Year)
14.6	VRMS SLA Year 4 (Fourth Financial Year)
14.7	Supplementary Valuation Year 2: Close Out Report (Second Financial Year)
14.8	Supplementary Valuation Year 3 : Close Out Report (Third Financial Year)
14.9	Supplementary Valuation Year 4: Close Out Report (Fourth Financial Year)
PAYMENT PLAN SCHEDULED BY MONTH TO BE SUBMITTED IN CONJUNCTION WITH THE WORK PROGRAM FOR PHASE TWO	

SECTION O

**COMPUTER HARDWARE EQUIPMENT, SOFTWARE AND INFORMATION TECHNOLOGY
SYSTEMS**

1. The Bidder hereby certifies that the Bidder has, or will acquire, the computer hardware, software and technology systems which are necessary to undertake the general valuation for the Umsobomvu Municipality for 2014 -2017 and valuation roll maintenance for 2015 to 2017.

2. The Bidder accepts that the Umsobomvu Municipality will not compensate the Bidder for computer hardware, software and technology systems which are necessary to undertake the general valuation for the Umsobomvu Municipality for 2014 - 2017 and valuation roll maintenance for 2015 to 2017.

NAME OF DECLARANT

NAME OF BIDDER

SIGNATURE OF DECLARANT

DATE

SECTION P

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the Umsobomvu Municipality, or persons who act on behalf of the Umsobomvu Municipality or persons having a kinship with persons employed by the Umsobomvu Municipality, including a blood relationship, may make an offer or offers in terms of this bid invitation. In view of the possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the Umsobomvu Municipality, or to persons who act on behalf of the Umsobomvu Municipality, or to persons connected with or related to them, it is required that the bidder or shall declare the Bidder's position with the evaluating authority and take an oath declaring the bidder's interest, where-

- (a) the Bidder is employed by the Umsobomvu Municipality or acts on behalf of the Umsobomvu Municipality; and
- (b) the legal person on whose behalf the bid document is signed, has a relationship with a person who is involved with the evaluation of the bid, or where it is known that such a relationship exists between the person or persons for whom or on whose behalf the declarant acts and persons who are involved with the evaluation of the bid

2. Are you or any person connected with the bid employed by the Umsobomvu Municipality?

YES/NO

If "YES", state particulars:

3. Do you or any person connected with the bid, have a relationship (family, friend, other) with a person employed by the Umsobomvu Municipality, concerned with any Bid Committee or Supply Chain Management Unit, and who may be involved with the evaluation or adjudication of this bid.

YES/ NO

If "YES", state particulars

4. Are you or any person connected with the bid aware of any relationship (family, friend, other) between another bidder and any person employed by the Umsobomvu Municipality, concerned with any Committee or Supply Chain Management Unit, who may be involved with the evaluation or adjudication of this bid?

YES/NO

If "YES", state particulars

NAME OF DECLARANT

NAME OF BIDDER

SIGNATURE OF DECLARANT

DATE

SECTION Q
TAX CLEARANCE CERTIFICATE REQUIREMENTS

1. It is a condition of a bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

2. In order to meet this requirement, bidders are required to complete in full the attached form TCC 001 "Application for a Tax Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders/individuals who wish to submit bids.

3. SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval. Copies of TCC 001 "Application for a Tax Clearance Certificate" form are available from any SARS branch office nationally or on the website www.sars.gov.za.

4. The **ORIGINAL TAX CLEARANCE CERTIFICATE** must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate will not be acceptable.

5. In bids where consortiums, joint ventures or sub-contractors are involved, each party must submit a separate Tax Clearance Certificate.

6. Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website www.sars.gov.za.

SECTION R

DECLARATION WITH REGARD TO PREFERENTIAL POINTS

Interested service providers who wish to claim preferential points must attach to their proposal certified evidence of B-BBEE status level issued by a registered verification agency.

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to all bids:
The 90/10 system for preference and price will be used to evaluate the bid. Rand value above R1m;
- 1.2 The value of this bid is estimated to exceed R1m and therefore the 90/10 system shall be applicable.
- 1.3 Preference points for this bid shall be awarded for:
 - (a) Price; and
 - (b) Specific contract participation goals, as specified in the attached forms.

1.3.1 The points for this bid are allocated as follows:

1.3.1.1 PRICE	POINTS 90
1.3.1.2 SPECIFIC CONTRACT PARTICIPATION GOALS	
(a) B – BBEE Status Level	10

1.4 Failure on the part of a bidder to submit a certificate issued by a registered verification agency in accordance with the Preferential Procurement Regulations of 2011 will result in the forfeiture of preference points.

1.5. The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. GENERAL DEFINITIONS

2.1 "**Acceptable bid**" means any bid which, in all respects, complies with the specifications and conditions of bid as set out in the bid document.

2.2 "**Bid**" means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods, works or services.

2.3 "**Comparative price**" means the price after the factors of a non-firm price and all unconditional discounts that can be utilised have been taken into consideration.

2.4 "**Consortium or joint venture**" means an association of persons for the purpose of combining their expertise, property, capital, efforts, skills and knowledge in an activity for the execution of a contract.

2.5 "**Contract**" means the agreement that results from the acceptance of a bid by an organ of state.

2.6 "**Specific contract participation goals**" means the goals as stipulated in the Preferential Procurement Regulations 2011.

2.7 "**Control**" means the possession and exercise of legal authority and power to manage the assets, goodwill and daily operations of a business and the active and continuous exercise of appropriate managerial authority and power in determining the policies and directing the operations of the business.

2.8 "**Management**" means an activity inclusive of control and performed on a daily basis, by any person who is a principal executive officer of the company, by whatever name that person may be designated, and whether or not that person is a director.

2.10 "**Owned**" means having all the customary elements of ownership, including the right of decision-making and sharing all the risks and profits commensurate with the degree of ownership interests as demonstrated by an examination of the substance, rather than the form of ownership arrangements.

2.11 "**Person**" includes reference to a juristic person.

2.12 "**Rand value**" means the total estimated value of a contract in Rand denomination that is calculated at the time of bid invitations and includes all applicable taxes and excise duties.

2.13 "**Small, Medium and Micro Enterprises (SMMEs)** bears the same meaning assigned to this expression in the National Small Business Act, 1996 (No 102 of 1996).

2.14 "**Sub-contracting**" means the primary contractor's assigning or leasing or making out work to, or employing another person to support such primary contractor in the execution of part of a project in terms of the contract.

- 2.15 **"Trust"** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person.
- 2.16 **"Trustee"** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

3. ADJUDICATION USING A POINT SYSTEM

- 3.1 The bidder obtaining the highest number of points will be awarded the contract.
- 3.2 Preference points shall be calculated after prices have been brought to a comparative basis.
- 3.3 Points scored will be rounded off to 2 decimal places.
- 3.4 In the event of equal points scored, the bid will be awarded to the bidder scoring the highest number of points for specified goals.

4. POINTS AWARDED FOR PRICE

4.1 THE 90/10 PREFERENCE POINT SYSTEMS

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

90/10

$$P_s = 90(1 - \frac{P_t - P_{min}}{P_{mm}})$$

Where

Ps = Points scored for price of bid under consideration

Pt = Rand value of bid under consideration

Pmin = Rand value of lowest acceptable bid

5. Points awarded for B – BBEE Status

5.1 In terms of the Regulation on Preferential Procurement preference points for being B – BBEE are calculated on the level of contribution as stated on a Status Level Certificate issued by a registered verification agency in terms of the Preferential Procurement Regulations

6. BID DECLARATION

6.1 Bidders who claim points in respect of equity ownership must complete the Bid Declaration at the end of this form.

7. DECLARATION WITH REGARD TO EQUITY

9.1 Name of firm _____

9.2 VAT registration number _____

9.3 Company registration number _____

8. TYPE OF FIRM

Partnership

One person business/sole trader

Close corporation

Company

(Pty) Limited

[TICK APPLICABLE BOX]

9. DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

COMPANY CLASSIFICATION

- Manufacturer
- Supplier
- Professional service provider
- Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

10. MUNICIPAL INFORMATION

Municipality where business is situated:

Registered Account No:

Stand No:

(Copy of latest account must be attached)

11. TOTAL NUMBER OF YEARS THE FIRM HAS BEEN IN BUSINESS?

12. List all Shareholders by Name, Position, Identity Number, Citizenship, HOI status and ownership, as relevant. Information to be used to calculate the points claimed in paragraph 8.

Name	Date/Position occupied in Enterprise	ID Number	Date RSA Citizenship obtained	• HDI Status			% of business / enterprise owned
				No franchise prior to elections	Women	Disabled	

*Indicate YES or NO

13. Consortium / Joint Venture

9.10.1 In the event that preference points are claimed for B-BBEE Status Level, by consortia / joint ventures, the following information must be furnished in order to be entitled to the points claimed in respect of the B-BBEE Status Level:

Name of Joint Venture (to be consistent with paragraph 9.8)	Percentage (%) of the contract value managed or executed by the Joint Venture

I/we, the undersigned, who warrants that he/she is duly authorised to do so on behalf of the firm certify that points claimed, based on the B-BBEE Status Level, indicated above of the foregoing certificate, qualifies the firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct.
- (ii) The Status Level claimed is 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 paragraph 8, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct.
- (iv) If the claims are found to be incorrect, the purchaser may, in addition to any other remedy it may have -
 - (a) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct; and
 - (b) 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;

WITNESSES:

1.

2.

..... SIGNATURE(S) OF BIDDER (S)

DATE:.....

ADDRESS:.....

.....

.....

.....

SECTION S

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. Section S completed by (Bidder)

2. Is the Bidder of sound financial standing (according to credit check)?

YES/ NO

If "NO", state particulars

3. Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector?

If "YES", state particulars

4. Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004) (see www.treasurv.gov.za)?

If "YES", state particulars

5. Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?

6. Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?

SECTION T

CORRECTNESS OF INFORMATION SUPPLIED IN THIS DOCUMENT

1. I, the undersigned, certify that I am duly authorised on behalf of the Bidder-
- (a) to certify that the information supplied in terms of this document is correct and true; and
 - (b) to acknowledge that the bidder will furnish documentary proof regarding any bidding issue to the satisfaction of the Umsobomvu Municipality, if requested to do so.
2. If the information supplied in this document is found to be incorrect or false, the Umsobomvu Municipality, in addition to any remedies it may have, may-
- (a) recover from the Bidder all costs, losses or damages incurred or sustained by the Umsobomvu Municipality as a result of the award of the contract, and
 - (b) cancel the contract and claim any damages which the Umsobomvu Municipality may suffer by having to make less favourable arrangements after the cancellation.

Signed by me at this day of 20.....

NAME

NAME OF BIDDER

SIGNATURE

DATE

WITNESS 1

WITNESS 2

SECTION U
CONTACT DETAILS OF BIDDER

Name Bidder: _____

Address: _____

Telephone number: _____

Fax number: _____

Email address: _____

Contact person: _____

UMSOBOMVU MUNICIPALITY

SPECIFICATION DOCUMENTATION

BID NUMBER: 3/5/2013

GENERAL VALUATION FOR 2014-2017 AND
VALUATION ROLL MAINTENANCE FOR 2015 TO 2017

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1. DEFINITIONS

In this document, except if the context indicates otherwise –

"Category of property" means a category of property as envisaged in terms of section 8 of the MPRA and adopted by the Municipality for the levying of rates which must be applied to each property in the valuation roll;

"Computer assisted mass appraisal (CAMA)" means a system and technique use in valuing property, which incorporates computer-assisted statistical analyses such as multiple regression analysis and adaptive estimation procedure to assist the Municipal Valuer in estimating value;

"Certified valuation roll" means the final valuation roll certified by the Municipal Valuer after a general valuation or a supplementary valuation;

"Data and Information" means data collection field sheets, valuations, calculations, photographs, spreadsheets, databases, files, maps, market reports, sales analysis, sale and rental records, MPRA training guides, aerial photos, satellite imagery, GIS valuation roll cadastral property register (ESRI source) and systems, whether electronic or hard copy;

"Geographical Information Systems (GIS)" means a database management system used to store, retrieve, manipulate, analyze, and display spatial information and a computerised mapping system capable of integrating spatial data (land information) and attribute data among different layers on a base map;

"MPRA" means the Municipal Property Rates Act, 2004 (Act No. 6 of 2004);

"Service Provider" includes employees, agents and sub-consultants;

2. PROJECT OBJECTIVE

The objective of the project is to appoint a Service Provider to – (a)

create a valuation roll management system;

(b) create a property register;

(c) undertake a general valuation;

(d) assist with the resolution of objections;

(e) assist with the resolution of appeals; and

(f) undertake valuation roll maintenance.

3. PROJECT DELIVERABLES

The Service Provider must deliver the following deliverables Phase one and Phase Two as set out more fully in clauses 4-16:

PROJECT WORK PROGRAM

TASK ID	PHASE ONE: DELIVERABLES AND WORK PROGRAM
1	PROJECT MANAGEMENT FUNCTION
1.1	Project Management Function: provide and manage a project plan for the implementation of the general valuation; manage and report on project deliverables and milestones; manage and report on project progress and project payments; attend Municipal steering committee meetings at least monthly; manage and report on project risk; manage daily, weekly and monthly data backups in terms of data management
2	PROJECT OFFICE & PROJECT ESTABLISHMENT
2.1	Draft & Finalize Project Contract (MOA), project program and project cash flow plan
2.2	Finalize Sub-Contract agreements
2.3	Establish Project office and infrastructure
2.4	Project Office Overheads
2.5	Project Office IT Infrastructure cost
3	VALUATION ROLL MANAGEMENT SYSTEM (VRMS)
3.1	Installation of the Valuation Roll Management System at Project Office: <ul style="list-style-type: none"> • VRMS installed and operational • VRMS Valuation of property • VRMS data import and export facility • VRMS editing and keeping record of editing facility • VRMS reporting facility • Ability to capture and store Deeds Office data • Integration VRMS with GIS • Manage objections and appeals procedure
3.2	Integration of Valuation Roll Management System with Municipal System
3.3	Signing of VRMS Service Level Agreement
3.4	Valuation Roll Management System (VRMS) Phase one: first year license fee
3.5	Hard Copy & Electronic Data Storage, Back-up and Retrieval Plan
3.6	Hard Copy & Electronic Data Storage, Back-up and Retrieval
4	PROPERTY REGISTER CREATION AND DELIVERY OF COMPONENTS
4.1	Identify data sources
4.2	Acquire, clean and prepare data (in addition to 4.3 and 4.4 below)
4.3	Deeds office data (ownership and sales data) extracts approved by municipal valuer and integrated to VRMS
4.4	Acquire aerial photography/imagery
4.5	Prepare and create Property Register which shall comprise an electronic data base of all properties as per bid document
4.6	Prepare and create GIS Property register layer in ESRI shape file format aligned to the property register database as per bid document
4.7	Report on conflict between GIS property register layer and property register database
5	PROJECT SALES REVIEW: MARKET AND VALUATION METHODOLOGY REPORTS
5.1	Residential Contact Sales Review, Market & Valuation methodology Reports (to be read with annexure D) : 1) Initial market report and (2) final market report <ul style="list-style-type: none"> • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Data collection and sales review forms
5.2	Non-Residential Contact Sales Review, Market & Valuation methodology Reports (to be read with annexure D) : 1) Initial market report and (2) final market report <ul style="list-style-type: none"> • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Building cost report for specialized properties • Data collection and sales review forms • Valuation templates
6	DATA COLLECTION RESIDENTIAL
6.1	Develop and submit Data Collection/Data Capture methodology including digitized footprint plan
6.2	Prepare & submit Data Collection and data capture training manuals & Data Collection forms per property type (to be read with annexure D)
6.3	Recruit and train data collectors
6.4	Collect / Verify and Capture Data (data, sketch, photos, etc) undertake quality assurance in terms of Bid document
6.5	Collect / Verify and Capture Postal Address Data
6.6	Quality assurance Data Review
6.7	Maintain data
7	RESIDENTIAL VALUATIONS
7.1	Generate Values (Draft Value per property/Draft Valuation Roll) <ul style="list-style-type: none"> • CAMA models and mass valuation methodology
7.2	Undertake Value Review and quality assurance <ul style="list-style-type: none"> • Identify anomalies • Sales ratio study • Report on final values which deviated by more than 10% from original draft values • Adjust values where necessary •

TASK ID	PHASE ONE: DELIVERABLES AND WORK PROGRAM
7.3	Value Finalization (Final value per property / Final valuation Roll)
8	DATA COLLECTION NON RESIDENTIAL
8.1	Develop and submit Data Collection methodology
8.2	Prepare & submit training manuals & Data Collection forms (to be read with annexure D)
8.3	Collect / Verify and Capture Data (data, sketch, photos, etc) undertake quality assurance in terms of Bid document
8.4	Collect / Verify and Capture Postal Address Data
8.5	Quality assurance Data Review
8.6	Maintain data
9	NON RESIDENTIAL VALUATIONS
9.1	Valuations (draft values)
9.2	Undertake Value Review and quality assurance <ul style="list-style-type: none"> • Identify anomalies • Report on final values which deviated by more than 10% from original draft values • Adjust values where necessary
9.3	Value finalization and final CAMA models (Final Value per property / final valuation roll)
10	COMMUNICATIONS
10.1	Submit Public Awareness & Communication Plan
10.2	Assist with Implementation of the Public Awareness & Communication Plan
10.3	Assist in Rates Policy and Bylaw Review and Preparation in year of Implementation
11	VALUATION ROLL
11.1	Compile and print Final General Valuation Roll certified by the Municipal Valuer
11.2	Upload GV Roll and Objections forms to designated Website
11.3	Close out report - GV
12	OBJECTION/APEALS MANAGEMENT
12.1	Process objections GV <ul style="list-style-type: none"> • Record objections in database • Respond in writing o objectors • Consider objections and adjust value, if appropriate • Make available sales evidence in support of decision upon request • Provide written reasons for adjustments greater than 10% • GIS cadastral layer of objections received with decisions and changes • Notify objectors in writing of decision • Provide written reasons to objectors for adjustment upon request from objectors
12.2	Report on objections
12.3	Close out report objections
12.4	Process Appeals GV <ul style="list-style-type: none"> • Record appeals in database • Make available sales evidence in support of decision upon request • Represent the Municipality at Valuation appeal board hearings • GIS cadastral layer of objections received with decisions and changes
12.5	Close out report appeals
13	SUPPLEMENTARY VALUATION ROLL/S (PHASE ONE)
13.1	Compile Supplementary Roll/s Phase One <ul style="list-style-type: none"> • Investigate valuation queries • Identify property omitted, newly included property, newly created property, substantial change in value of property, incorrectly valued property, property changing category • Update ownership and particulars • Approve supplementary valuations and updates to valuation roll • Print Final Supplementary Valuation roll certified by the Municipal Valuer
13.2	Upload SVR 1 and Objection forms to designated website
13.3	Process objections
13.4	Report on objections
13.5	Process Appeals
13.6	Close out report on objections and appeals
14	PHASE TWO: VALUATION ROLL MAINTENANCE
14.1	Supplementary Valuation Year 2 (Second Financial Year)
14.2	Supplementary Valuation Year 3 (Third Financial Year)
14.3	Supplementary Valuation Year 4 (Fourth Financial Year)
14.4	VRMS SLA Year 2 (Second Financial Year)
14.5	VRMS SLA Year 3 (Third Financial Year)
14.6	VRMS SLA Year 4 (Fourth Financial Year)
14.7	Supplementary Valuation Year 2: Close Out Report (Second Financial Year)
14.8	Supplementary Valuation Year 3 : Close Out Report (Third Financial Year)
14.9	Supplementary Valuation Year 4: Close Out Report (Fourth Financial Year)
PAYMENT PLAN SCHEDULED BY MONTH TO BE SUBMITTED IN CONJUNCTION WITH THE WORK PROGRAM FOR PHASE TWO	

4. ADDED SERVICES

The Service Provider may be requested to undertake valuations for purposes other than for rating purposes. The Municipality is not obliged to use the Service Provider and is entitled to use other resources for added services.

5. INFORMATION PROVIDED BY THE MUNICIPALITY IN SUPPORT OF THE BID PRICING

(1) The current valuation roll is valid until 30 June 2014 with a general valuation having been undertaken and a valuation roll submitted on 1 July 2009. During the period of validity, three supplementary valuation rolls were produced with the last supplementary valuation roll produced on 24 June 2013.

(2) The Municipality is to provide information on data availability and confidence levels as per Annexure A to assist with the bid pricing.

(3) The estimated number of properties to be provided and inserted into the pricing schedule Section N of the Bid quotation Document.

(4) The Municipality will provide the following information to the Bidders in attendance at the briefing session in support of the bid pricing –

- (a) an electronic extract of the current general valuation roll (Part A of the Property Register);

(b) an electronic extract of the billing system data used for levying rates on the valuation roll (Part B of the property register); and

(c) property count by category of property and property use codes.

6. **PROJECT START DATE**

It is envisaged that the successful service provider will need to be ready to assume work by 1 July 2013

7. **COMPULSORY HUMAN RESOURCES, SYSTEMS AND DOCUMENTS REQUIRED TO QUALIFY AS A SERVICE PROVIDER**

(1) The Service Provider must provide the following human resources:

(a) a Municipal Valuer with at least 5 years of experience in performing the functions of a Municipal Valuer as contemplated in section 34 of the MPRA, who is registered as a Professional Valuer with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000);

(b) an Assistant Valuer who is registered as a Professional Valuer, Professional Associate Valuer or Candidate Valuer with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000);

(c) a GIS and Data Manager with at least 3 years experience in GIS and data management;

(d) a Project Manager with at least 3 years experience in project management;

(e) data collectors; and

(f) data capturers.

(2) The Service Provider must provide a valuation roll management system which complies with the specifications in clause 10.

(3) The Service Provider must complete the Bid Quotation Documentation and submit all the documents required in terms thereof.

8. VERIFICATION OF MUNICIPAL VALUER AND ASSISTANT MUNICIPAL VALUERS

The Municipality may verify the qualifications, registration and experience of the nominated Municipal Valuer, Assistant Municipal Valuer, GIS and Data Manager or Project Manager.

9. VALUATION STANDARDS, QUALITY ASSURANCE AND MONITORING

(1) Steering Committee

The Service Provider must attend a monthly steering committee meeting to report on progress.

(2) Best practice

The Service Provider must follow best practice in terms of the International Valuation Standards (IVS) on valuations and the International Association of Assessing Officers (IAAO) on mass valuation guidelines to ensure quality is maintained.

(3) Data collection

(a) A data collector must undergo training in data collection and property inspection routines and obtain a pass rate of at least 60% in a proficiency test approved by the Municipal Valuer, in order to be eligible for designation as a data collector in terms of section 36 (2) of the MPRA.

(b) Data can only be collected by designated data collectors who must record data on the approved data collection forms and in accordance with the approved data collection manuals. The data collector must record their full name or data collector code on the data collection form.

(c) Data collected must be subjected to quality assurance (quality assurance) by an assigned data collector supervisor who must review at least 10% of the properties within a batch by category of property.

(d) A batch size may not be more than 200 properties.

(e) The methods and definitions employed to collect data contained in the data collection manuals must be used in the quality assurance process to verify the correctness of the data eg. if digitised aerial photography has been used to determine building area then this must be used in the quality assurance process.

(f) Measures of data quality will be against-

(i) administrative data of the property and ownership,

(ii) category of property; and

(iii) building and land data.

(g) The quality assurance process must compare the original data collected against the quality assurance data collected to identify errors and missing data.

(h) An individual data collection form fails when more than 15% of the critical value forming fields identified by the Municipal Valuer in the data collection manuals are missing or incorrect.

(i) If after quality assurance more than 30% fail then the entire batch must be recollected with quality assurance starting from the beginning.

(j) Missing or errors in data must be corrected on the data collection form.

(k) Data collectors who after ongoing training, continually produce data collection errors must have their designation withdrawn by the Municipal Valuer.

(4) Data capture

(a) Data must be captured by batch per data collection form and the data capturer must record their full name or data capturer code on the data collection form.

(b) Data captured must be reviewed for capture errors by checking at least 10% of the data collections forms captured by batch.

(c) By comparing the data captured on the system to the original data recorded on the hard copy data collection form.

(d) A data capture form will fail when more than 15% of the critical value forming fields identified by the Municipal Valuer in the data collection manuals are missing or incorrect.

(e) All missing data or errors identified must be corrected and updated to the valuation roll management system.

(f) If after quality assurance, more than 30% of the 10% of the data capture forms of a batch have been checked for quality assurance fail, the entire batch must be recaptured and the quality assurance process must be repeated.

(5) Maintaining quality and accuracy

Valuation quality and accuracy must be maintained by-

(a) undertaking a sales review;

(b) undertaking a value review;

(c) observing the International valuation Standards (IVS);

(d) observing the standards of the International Association of Assessing Officers IAAO; and

(e) applying sales ratio studies to identify value consistency and uniformity.

10. VALUATION ROLL MANAGEMENT SYSTEM (VRMS) (IF APPLICABLE, SEE BID GUIDELINE DOCUMENT)

(1) Introduction

A valuation roll management system (VRMS) is software which assists a municipality with the production of the property register, the production of valuation rolls, the management of property data, sales data, valuation data and the resolution of objections and appeals. A valuation roll management system must comply with the requirements of the **MPRA** and must support the creation, editing, updating, deletion, storage and search of data. A valuation roll management system must have the ability to export and import data, to record changes and to produce audit reports.

(2) **Compliance of the valuation roll management system (VRMS) with the MPRA**

The valuation roll management system must comply with the provisions of the MPRA.

(3) **Compatibility with GIS system**

The valuation roll management system must be compatible with the a recognized GIS System.

(4) **Compatibility with municipal financial system**

The valuation roll management system must be compatible with Abakus and the Service Provider must demonstrate the interface and compatibility prior to appointment.

(5) **Storage and maintenance of data**

The valuation roll management system must be able to store data and must be able to create, read, update, delete and search entries with a full history of any changes for audit purposes. The valuation roll management system must be able to store electronic files against a property shown in the valuation roll.

(6) **Recording of objections and appeals**

The valuation roll management system must be capable of recording and tracking objections and appeals lodged in terms of the MPRA.

(7) **Reporting functionality**

The valuation system must be capable of producing and extracting the following reports and information:

- (a) extract of the valuation roll;

- (b) extract of all valuation roll data including data per property type;
- (c) report of property count per category with market value summary;
- (d) report by exception on missing information;
- (e) report by exception of mismatches of new valuation roll to existing financial system and valuation roll data; and
- (f) sales report per homogeneous area.

(8) **Data from Deeds Office**

The valuation roll management system must be capable of updating the valuation roll and property register with Deeds Office updates to support the maintenance of the valuation roll.

(9) **Valuation support**

The valuation roll management system must be capable of determining values using applied data.

(10) **Valuation Roll updates**

The valuation roll management system must be capable of producing reports of all changes reflecting old value and new value, the difference in the value up or down with the effective date of the change.

(11) **Audit trail**

The valuation roll management system must be able to track and report on all changes reflecting the previous record and the new updated record and comply with audit control standards. The Service Provider must also ensure that the existing valuation roll is stored electronically on the main database for cross reference and audit purposes.

11. DATA SECURITY AND RECOVERY

(1) The valuation roll management system must be secure to ensure that critical valuation data cannot be manipulated or corrupted.

(2) A backup must be made of all data at the end of every Monday, Tuesday, Wednesday and Thursday.

(3) On Friday a backup must be made of all data for the whole week. The weekly backup must be stored off-site, together with the backups of the three preceding weeks.

(4) At the end of every month a backup must be made of all data for the month. The monthly backup must be stored off-site, together with the backups of all preceding months.

12. PROPERTY REGISTER

(1) Introduction

A property register means "Part A" of the valuation roll as envisaged in terms of section 23 of the MPRA, including valuation rolls prepared in terms of sections 30, 77, 78 and 79 of the MPRA, the corresponding valuation roll property database, the corresponding GIS cadastral layer and the corresponding aerial photography which are aligned to the definition of "property" and comprises registered deeds office records (full title and sectional title), registered rights against immovable property, land tenure rights, public service infrastructure (PSI) records and all other rateable property.

(2) Property register components

The Service Provider must provide the following:

(a) an electronic database of all properties contained in the property register with related attribute data approved by the municipal valuer;

(b) property ownership type eg. registered full title, registered sectional title, registered right as defined under (b) of the definition of property in the MPRA, land tenure right and other forms of ownership;

- (c) a GIS property register layer which must comply with the specifications contained in Annexure C in an ESRI shape file format aligned to the property register database.
- (d) a report of the mismatches between the property register database and the GIS property register layer with reasons for mismatches and mismatch corrective action plan;
- (e) the deeds data used in the preparation of the property register and valuation roll with at least two years of deeds history prior to the valuation date; and
- (f) the aerial photography as specified in Annexure B.

(3) Property register maintenance

- (a) The Service Provider must date stamp the deeds data used in the preparation of the property register and valuation roll for the supplementary maintenance phase.
- (b) The Service Provider must maintain the GIS property register layer by correcting any mismatches and updating property register changes.

13. GENERAL VALUATION

The Service Provider must undertake a general valuation of all rateable property in terms of the MPRA, taking account of best practice valuation methodology and the categories of property adopted by the Municipality.

(1) Contents of valuation roll

The particulars in section 48(2) of the MPRA must be recorded in the valuation roll as well as the following additional particulars:

- (a) current and previous owners (Deeds Office extract);
- (b) date of transfer (Deeds Office extract);
- (c) date of sale (Deeds Office extract);
- (d) sales price (Deeds Office extract);
- (e) title deed number (Deeds Office extract);
- (f) servitudes (Deeds Office extracts where available);

- (g) notarial ties (Deeds Office extract where available);
- (h) endorsements (Deeds Office extract); and
- (i) history (Deeds Office extract).
- (j) the actual use of the property; and
- (k) postal addresses as contemplated in section 34(h) of the MPRA.

(2) Development of categories of property

The Service Provider must assist the Municipality with the development of categories of property prior to the commencement of the general valuation.

(3) Data collection and capture

- (a) Valuation data must be collected and captured accurately taking account of the data to be collected by property valuation type under annexure D and the data availability and confidence levels annexure A, in order for the Municipal Valuer to determine the market value of all properties which must be included in the valuation roll.
- (b) The Service Provider is responsible for data collection and data capture for the duration of the contract.
- (c) Data collected and captured must be capable of being checked, audited, verified and monitored.
- (d) The Service Provider must allow access to the data and information during business hours and must make the data available in a standard electronic format to the Municipality upon request.
- (e) The Service Provider must develop and provide data collection and capture training manuals and data collection forms per property type, prior to the commencement of the data collection phase of the general valuation.
- (f) Aerial photography may be used under the following conditions:
 - (i) to identify improvements;

(ii) to determine building areas by digitising footprints of structures, providing a digitising implementation plan is submitted and approved by the Municipal Valuer in terms of the data collection manuals;

(iii) where the accuracy of valuations will not be prejudiced or subjected to unreasonable risk in the application of mass valuations.

(g) The Service Provider must provide a property access status code against each property captured on the valuation roll management system (VRMS) as following:

- (i) full access (exterior of buildings on site),
- (ii) no access (information from owner),
- (iii) no Access after two failed attempts (view from road),
- (iv) no Access (refused access),
- (v) not inspected (data deemed sufficient for valuation),
- (vi) any other status considered necessary by Service Provider.

(h) Data must be collected for new buildings and structures, new properties, ownership changes and errors identified by the Municipal Valuer or the Municipality from 1 April 2013 up to 3 months before the final roll is delivered, on 31 January 2014.

(i) For supplementary valuations and the supplementary valuation roll, the Service Provider must collect valuation roll property attribute data for changes in terms 78 and 79 of the MPRA from Chief Financial Officer for the duration of the contract.

(j) For objections and appeals the Service Provider must collect valuation roll property attribute data for changes and Valuation Appeal Board decisions for the duration of the contract.

(k) Construction features, characteristics, attachments, ancillary buildings and other recognised improvements for each property must be recorded on the data collection form or field review document. Construction quality and condition must be considered and must be based upon the adopted valuation methodology, training manuals and definitions.

(4) **Quality assurance**

The quality assurance specifications in clause 11(3)-(5) of this document must be applied to ensure that quality of the valuation roll is maintained

(5) **Market report**

(a) The Service provider must prepare a market report which reflects the valuation methodologies, researched sales data, market information and analysis, motivations and market conclusions upon which the general valuation will be based per property type.

(b) The market reports must include the valuation templates, calculations and data collection forms to be used in the value determination.

(c) The Service Provider must undertake a sales review based on the sales extracted from the deeds office. The Municipal Valuer or an Assistant Municipal Valuer must inspect each sale, collect the property data and confirm suitability of the sale which will be used in the general valuation. A sales review form must be developed and submitted for approval by the Municipality at the commencement of the sales research, analysis and review phase.

(d) The market report must include researched and analysed sales evidence with documented sales used in the general valuation per homogeneous area. The market report must reflect the market information as at the date of valuation and must include sales cadastral maps either in hard copy or in a GIS spatial format (ESRI) shape file which can be accessed by the Municipality and the Valuation Appeal Board.

(e) In homogeneous areas where there are insufficient sales to determine values, proxy sales or control valuations must be conducted by Assistant Municipal Valuers to support the sales data base and computer assisted mass appraisal system or techniques. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system database for easy identification.

(f) Comparable sales data and market indicators must be documented. In addition, records relating to rentals, vacancies, expense ratios, capitalisation rates, construction costs and any other data that will have an impact on market value must be documented, recorded and analysed.

(g) The physical attributes as they existed at the date of sale may differ from those at the date of inspection when viewed by the Municipal Valuer or an Assistant Municipal Valuer. The report must therefore include reference to any changes that have been identified since the date of sale which would impact on the adjustment to the sale price.

(h) For specialised properties the Service Provider must develop and produce a building cost report relating to the various types of specialised buildings or structures to be valued using the cost approach. In addition where the profits and accounts approach is used, a market report must be developed and produced pertaining to the property under valuation.

(i) All analysis must be documented in two stages: version 1 must be submitted at the commencement of the value review phase and version 2 must be delivered with the certified valuation roll. The preparation of the market reports must be supervised by the Municipal Valuer or an Assistant Municipal Valuer and each property sector market report must be approved by the Municipal Valuer.

(j) The Service Provider must develop and prepare a market report for each property type based on the broad property sectors covering:

(i) agricultural property by type and node (direct sales comparison and cost approach by individual valuation);

(ii) commercial and Industrial property per node (Income approach individual valuation or by computer assisted mass appraisal CAMA techniques);

(ii) public service infrastructure (PSI): by PSI type and in terms of rates policy and the policy on valuing the various PSI (If applicable).

(iv) residential and sectional title residential property per locality homogeneous area (direct sales comparison approach by computer assisted mass appraisal CAMA techniques);

(v) specialised property specific per property (cost approach or profits and accounts approach by individual approach); and

(vi) vacant land by zoning or permitted land use and locality homogeneous area (direct sales comparison either individual approach or computer assisted mass appraisal techniques).

(6) Valuation

(a) The Service Provider must provide a market value for each property identified in the property register, except for property exclusion from valuation by the Municipality.

(b) The Service Provider must follow and maintain valuation best practice as contemplated in sections 45 and 46 of the MPRA.

(c) The Service Provider may use comparative, analytical and other systems or techniques, including aerial photography and computer assisted mass appraisal CAMA techniques.

(d) If the Service Provider uses computer assisted mass appraisal systems and techniques, the Service Provider must ensure that it has the necessary expertise and that it follows the International Valuation Standards (IVS) and mass valuation guidelines of the International Association for Assessing Officers (IAAO) as recognised by the South African Council for the Property Valuers Profession;

(e) The Service Provider must be familiar with the statistical systems and software required to deliver mass valuations and the statistical reports necessary for measuring value consistency, value uniformity and conducting sales ratio analysis in mass valuations.

(f) The Service Provider must produce and deliver draft values at least three (3) months (1" November), before the delivery of the final certified valuation roll and the values must have been substantially reviewed.

(g) Valuation calculation templates, computer assisted mass appraisal CAMA techniques models and motivations, data collection forms and information used to determine the values must be delivered with the final certified valuation roll.

(7) Value review

(a) The Service Provider must conduct a final value review to confirm or amend the market values of property.

(b) The value review must be conducted by the Municipal Valuer or an Assistant Municipal Valuer who is sufficiently familiar with local conditions of the homogeneous areas to identify economic trends and who has an understanding of computer assisted mass appraisal CAMA techniques employed by the Service Provider.

(c) The value estimates in relation to sample control valuations must be checked by using the market reports, aerial photography, data collection source field sheets and physical inspections (if necessary).

(d) The value review must-

(i) assess values for reasonableness by interrogating the data, draft values and final values, highlighting any anomalies and recommending corrective action and value amendments or justification for such anomalies;

(ii) compare building areas collected against the digitised areas for major anomalies for further investigation;

(iii) ensure that each property has been valued equitably in relation to other like properties;

(iv) determine value uniformity by conducting sale ratio studies in terms of international association of officers IAAO guidelines;

(v) assess the category assigned to each property for reasonableness;

(h) The valuer responsible for the value review must provide an approval on a sample batch basis of property values.

(i) If the valuer responsible for the value review does not accept a value estimate, the necessary adjustments must be made to the property data or valuation models to adjust the property value in line with market indicators.

(j) The valuer responsible for the value review must select the value that can be documented as most representative of the true property value.

(k) An override of value may not be made for a property of which the value is incorrect due to a data error.

(l) When in the judgment of the valuer responsible for value review an override of a calibrated mass appraisal model is required, a notation must be recorded in the CAMA system, in the form of a unique override code that explains the value methodology.

(m) The override code must be maintained in a way that will allow a query to select, sort and print specific property data through the VRMS system.

(n) When the final value deviates by more than 10%, from the estimate provided by a current market based valuation model, the Municipal Valuer must assess the reasonableness before adopting the value changes.

(o) The Service Provider must keep a record of value review (value review form) for audit purposes showing the review date, name of the valuer responsible for the value review, new override value and reasons for value change.

(p) The value review form of all changed values must be delivered with the final certified valuation roll.

(8) Valuation roll delivery

(a) The Service Provider must deliver a draft valuation roll at least three (3) months (1st November) before the delivery of the final certified valuation roll for the general valuation which must be delivered in terms of time frames specified in regulations.

(b) A draft valuation roll must be sufficiently complete to enable the Municipality to undertake quality assurance checks.

(c) A draft valuation roll must be delivered with all necessary electronic data and demonstrated ability to synchronise the roll data to the Municipality's financial system.

(d) The Service Provider must print and bind valuation rolls in the format prescribed in the MPRA.

(e) The certified valuation roll must be delivered to the Municipal Manager in hard copy.

(f) An electronic copy of a valuation roll must be delivered to the Municipal Manager in a format suitable for synchronising with the Municipality's financial system Abakus.

(9) Close-out report

The Service Provider must produce a close-out report as contemplate in Annexure F.

14. OBJECTIONS

(1) The Service Provider must manage the objection process in compliance with sections 50, 51, 52 and 53 of the MPRA, including the following –

(a) the Service Provider must record all objections in a database;

(b) the Service Provider must respond in writing to all objectors as required by the MPRA;

(c) the Service Provider must prepare the notices in terms of section 49 of the MPRA;

- (d) the Service Provider must consider objections and amend the valuation roll, if necessary based the Municipal Valuers decision;
 - (e) the Service Provider must make sales evidence in support of a decision regarding and objection available upon request by the Municipality;
 - (f) the Service Provider must provide written reasons to the Municipal Manager for any Municipal Valuer decisions of value greater than 10%;
 - (g) the Service Provider must prepare and maintain a GIS cadastral layer of objections received with decisions and changes;
 - (h) the Service Provider must notify an objector of the outcome of an objection and furnish reasons for its decision upon application by the objector;
 - (i) the Service Provider must furnish written reasons for its decision upon application by an objector;
 - (j) the Service Provider must prepare a close-out report of all objections received and processed.
- (2) The bid is limited to the processing of a maximum of 15% objections in respect of the property count, above which the Service Provider will be required to absorb the cost.
- (3) The Service Provider must produce a close-out report as contemplate in Annexure G.

15. APPEALS

- (1) The Service Provider must assist the municipality with the resolution of appeals, including the following –
- (a) the Service Provider must record all appeals in a database;
 - (b) the Service Provider must make sales evidence in support of a decision regarding and objection available upon request by the Valuation Appeal Board;
 - (c) The Service Provider must represent the Municipality at hearings of the Valuation Appeal Board through the Municipal Valuer or an Assistant Municipal Valuer;
 - (d) the Service provider must amend the valuation roll if the Valuation Appeal Board rules in favour of the appellant.
 - (e) the Service Provider must prepare and maintain a GIS cadastral layer of appeals received with decisions and changes; and

(f) the Service Provider must prepare a close-out report of all objections received and processed.

(2) The bid is limited to the processing of a maximum of 5% of appeals in respect of the objection count, above which the Service Provider will be required to absorb the cost.

(3) The Service Provider must produce a close-out report as contemplate in Annexure H.

16. VALUATION ROLL MAINTENANCE

(1) Valuation Roll Maintenance means valuation roll maintenance as contemplated in terms of section 34 of the MPRA, including:

(a) all liaison with the ratepayer or Municipality on any matter omitted from the valuation roll or contained in the valuation roll;

(b) the updating of ownership and other particulars to the valuation roll for the duration of the contract and amendment of the valuation roll as contemplated in section 79 of the MPRA.

(c) the preparation of a supplementary valuation roll In terms sections 77 and 78 of the MPRA, at least once per year:

(i) to include property incorrectly omitted from the valuation roll;

(ii) to include property included in a municipality after the last general valuation; (iii)

to include property subdivided or consolidated after the last general valuation; (iv) to

adjust the value of property that has substantially increased or decreased for any reason after the last general valuation;

(v) to adjust the value of property that have substantially been incorrectly valued during the last general valuation;

(vi) to adjust the value of property that must be revalue for any other exceptional reason, including property of which the category of property has changed.

(2) Supplementary valuations must reflect the market value of property determined in accordance with market conditions that applied as at the date of valuation determined for the last general valuation being 1 July 2009

- (3) The Service Provider must attend to valuation roll queries received from ratepayers or the Municipality outside the objection and appeal process.
- (4) Amendments to the roll as a result of queries received from ratepayers or the Municipality outside the objection and appeal process must be dealt with in the following supplementary valuation roll.
- (5) The valuation roll management system must show the old value and the new value with the effective date of change.
- (6) The Service Provider must update the Property Register for any supplementary updates including objections and appeal decisions which includes updating the GIS property register layer.
- (7) The Service Provider must ensure that all documents, correspondence, data collection forms and review forms emanating from the preparation of a supplementary valuation roll are scanned and uploaded to the valuation roll management system against the property.
- (8) The Service Provider must produce a consolidated valuation roll on an annual basis by the end of May to support the annual budget and rates review process.
- (9) The Service Provider must deliver a draft supplementary valuation roll at least 1 month before the final certified supplementary valuation roll.
- (10) A draft supplementary valuation roll must be sufficiently complete to enable the Municipality to undertake quality assurance checks.
- (11) A draft supplementary valuation roll must be delivered with all necessary electronic data and demonstrated ability to synchronise the roll data to the Municipality's financial system.
- (12) The Service Provider must print and bind supplementary valuation rolls in the format prescribed in the MPRA.
- (13) The certified supplementary valuation roll must be delivered to the Municipal Manager in hard copy.
- (14) An electronic copy of a valuation roll must be delivered to the Municipal Manager in a format suitable for synchronising with the Municipality's financial system Abakus.

(15) The Service Provider must produce an annual maintenance close-out report by the end of May to support the annual budget and rates review process.