



# UMZIMVUBU

LOCAL MUNICIPALITY

**ADVERTISING DATE: 18 August 2020**

**UMZ/20-21/RECORD MANAGEMENT TRAINING(CORP)**

**SERVICE PROVIDER TO CONDUCT RECORD MANAGEMENT TRAINING**

Bidders are hereby invited to submit proposals/Quotations for service provider to conduct record management training as per ToRs.

**MANDATORY DOCUMENTS TO BE SUBMITTED FAILURE TO DO SO WILL LEAD TO BE NON RESPONSIVE.**

Umzimvubu Local Municipality Supply Chain Management will apply. A valid Original Tax Clearance Certificate or confirmation from SARS with a verification pin, copy of company Registration/Founding Statement/CIPC Documents. Certified BBBEE certificate and a combined BBBEE for a joint venture (non-elimination item). JV Agreement for Joint venture. 80/20 evaluation criteria. Prices quoted must be firm and must be inclusive of VAT for vat vendors. Certified ID Copies of Managing Directors/ Owners. CSD Registration and MBD forms 4, 8 and 9 are compulsory submission and Billing Clearance certificate or Statement of Municipal Accounts. Certified copies of Certificates must not be later than 90 days of closing date. **No faxed, e-mailed and late tenders will be accepted.** Umzimvubu Local Municipality reserves the right not to appoint and value for money will be the key determinant. All quotation must be deposited in the quotation box situated at **Umzimvubu Local Municipality Offices at SCM office 813 Main Street, Mt Frere** not later than **12h00 noon on 28 August 2020**. All tenders must be clearly marked "Name of the project or Reference number". All service providers must be registered on CSD and submit proof. The municipality will not make award any award to a person or persons working for the state.

**Enquiries:** All technical enquiries may be directed to Ms. N. Ndongeni [Ndongeni.Nosisa@umzimvubu.gov.za](mailto:Ndongeni.Nosisa@umzimvubu.gov.za) & Mr Mbukushe (SCM Manager) 039 255 8500 [Mbukushe.Themba@umzumvubu.gov.za](mailto:Mbukushe.Themba@umzumvubu.gov.za)

Other enquiries regarding this Bid may be directed to the office of the Municipal Manager:

**Attention: Mr G.P.T Nota**

**813 Main Street or P/Bag X9020**

**MT FRERE**

**5090**

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**GPT NOTA (MUNICIPAL MANAGER)**

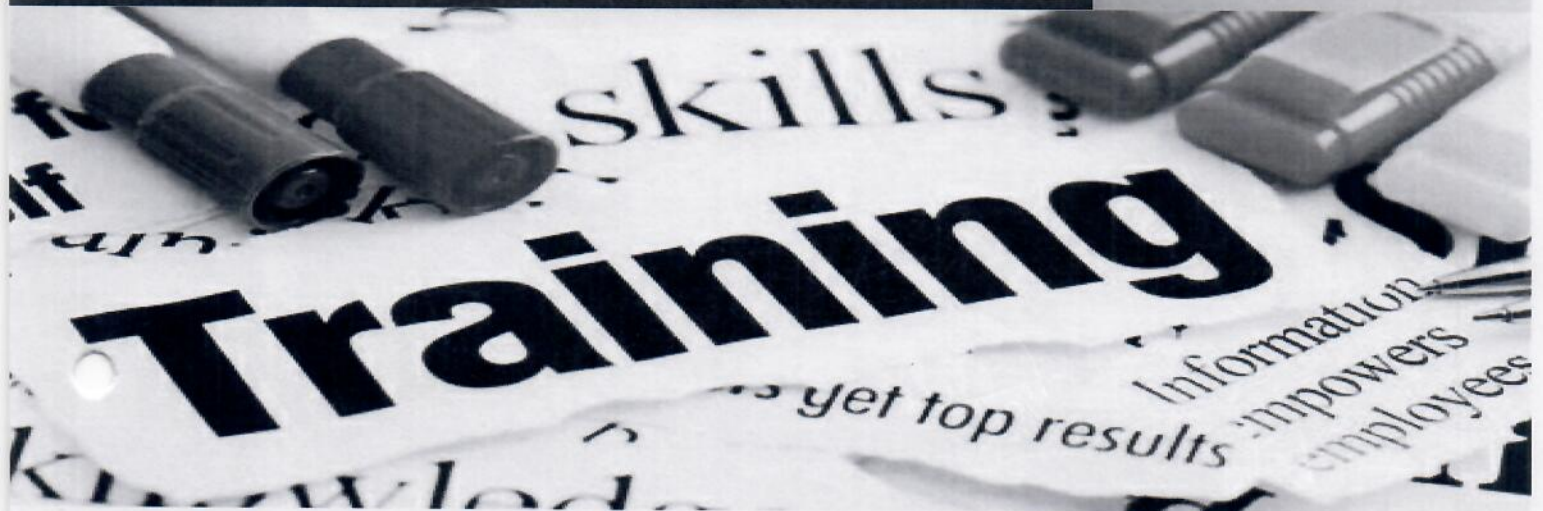


**UMZIMVUBU**  
— LOCAL MUNICIPALITY —

**UMZIMVUBU LOCAL MUNICIPALITY**

**2020 - 2021**

**TERMS OF REFERENCE RECORDS MANAGEMENT**



## **TERMS OF REFERENCE**

### **TRAINING OF UMZIMVUBU MUNICIPALITY OFFICIALS ON RECORDS MANAGEMENT**

#### **1. Background**

- 1.1 Umzimvubu Local Municipality is fully committed to the structured and systematic training and development of all its employees on an ongoing basis to enable them to perform their duties effectively and efficiently.
- 1.2 This will also be provided to enable them to acquire the skills, knowledge and related qualifications and to unlock their potential to meet its future human resources needs.
- 1.3 The Corporate Services Department: Human Resources Division has conducted the skills audit for all employees in preparation for the WSP of 2020/21 financial year. The training needs identified by the employees are all entered in the approved 2020/21 Workplace Skills Plan which was also submitted to and approved by LGSETA.

#### **2. Target Group**

- 2.1 Ten (10) Employees who have been identified for the said training programme in 2020/2021 financial year.

#### **3. Specific outcomes of the Training**

- 3.1 Discuss how records management works as a system.
- 3.2 Define the categories of records.
- 3.3 Distinguish among the filing systems.
- 3.4 Describe filing supplies and equipment needed.
- 3.5 Index and alphabetize ULM Employee names, business names, and governmental and political designations.
- 3.6 Explain the steps that should be followed in preparing paper records for filing.
- 3.7 Describe the guidelines for records retention and transfer.
- 3.8 Describe ethical issues regarding records

4. **The content should also cover but not limited the following aspects:-**

4.1 Understanding how the Municipal records management system is categorized

4.2 Purpose of records keeping

4.3 Classification and retention of records

4.4 Understanding of Municipal records system

5. **Objectives of the Training**

1. To introduce staff to records management principles and tools.

2. To stimulate thinking about current filing practices.

3. To carry out a practical records management exercise

4 Accurate and complete documentation of the policies and transactions of the Municipality

5 Control of the quantity and quality of records produced by the Municipality

6 Simplification of the activities, systems, and processes of records creation, maintenance, transfer, and use.

7 Judicious preservation and disposal of records.

6. **Duration**

6.1 This exercise has to be done and completed within a maximum number of not more than **three (03)** days.

7. **Methodology**

7.1 The course should be engaging and interactive.

7.2 Feedback and tips for improvement should be given to each of the participants.

7.3 Ten (10) municipal employees will be trained on records management

7.4 The participant shall also be given training materials by the service provider.

7.5 To provide an Assessment Plan and assessment process during and after the training

7.6 This training programme should be delivered at a specified National Qualification Framework ( NQF) and unit standard 123455.

## **8. PROPOSAL/ SUBMISSION REQUIREMENTS**

### **8.1 List of Contents**

All proposals must cover the following aspects of importance:

#### **8.1.1 A Detailed Company Profile**

Including brief history, field of expertise, staff resources, a proven tracking record of conducting translations or interpretations, where the main office is based as well as any other offices and a list of recently completed projects.

#### **8.1.2 Proposed Methodology**

Service provider should come up with a sound and workable methods for the development of the above, taking into cognisance clause 3 and 4 above.

#### **8.1.3 Registration**

8.1.3.1 Each service provider must be registered by the relevant authority.

8.1.3.2 A copy of registration certificate, preferable a letter from the registering authority.

#### **8.1.4 Proposed Cost Structure**

Detailed Breakdown of Proposed Fee Structure, and there should be a clearly stated whether it's inclusive of VAT or not.

#### **8.1.5 Compulsory Terms and Conditions**

8.1.5.1 A proposal will not be considered unless the service provider furnishes the ULM with the duly completed documents mentioned below and 8.1.3 above. In the event that a proposal is submitted by a consortium/joint venture, each party, consultant and or sub-contractor of such

consortium/joint venture must complete each of the documents mentioned below:-

a. Technical proposal include quality control, job creation and accountability.

B .The cost for both direct and in direct.

c. The capacity of the organisation to handle the project i.e. previous similar project done, project leader, C.V. of prominent individuals that are proposed to be involved in this project.

8.1.5.2 Bidders are required to submit the following documents (copies (except tax certificate) must be certified):-

- Founding Statement (CK / Company Registration Certificate) or certified copy must be submitted and failure will result in disqualification.
- A detailed company profile reflecting projects of similar nature.
- Bidders must submit a valid original SARS Tax Clearance Certificate; failure to submit will result in disqualification.
- Declaration of interest (MBD8)
- Completed and signed MBD 8.
- BBBEE Certificates original / certified copies must be submitted and failure to do so will result in loss of points.
- A proposed project team, their CV's of Directors and proof of relevant accreditation, must be submitted.
- A proposed work programme, or implementation plan etc.
- Pricing must be on the company letter head and be priced in different columns reflecting the total estimated budget for translation.
- Failure to supply all mandatory documents will result in the proposal/quote being deemed non-responsive; and therefore the quote will not be considered for award.

- Proposals/quotes which are late, incomplete, unsigned or submitted by facsimile or electronically, will not be accepted.
- Documents to be filled with black ink.
- Quotes submitted are to hold good for a period of 90 days.
- Bidders or service providers must be registered as a supplier/service provider on the Umzimvubu Local Municipality supplier/service provider database, if not already registered.

8.1.5.3 The ULM reserve the rights to amend any conditions, validity period, etc. in the event of material changes to the procedures, all parties will be duly notified and be dealt with transparently and equitably.

8.1.5.4 Successful bidders will need to be prepared to commence work within 14 working days upon receipt of purchase order or being informed of the award.

8.1.5.5 Successful bidder will be required to submit a detailed close-out report.

**8.2.1 Where to Submit:**

8.2.1 All submissions must be addressed for the attention of the Municipal Manager, Mr G.P.T. Nota and clearly marked:

**“RECORDS MANAGEMENT”**

8.2.2 Submissions must be hand delivered to the Municipal Offices in Mount Frere at Erf 813 Main Street, Mount Frere.

8.2.3 Due date for the submission of proposal is .....

**NO LATE SUBMISSIONS WILL BE CONSIDERED.**

## **9. INFORMATION AND QUERIES**

### **9.1 TECHNICAL QUERIES**

For the attention of Ms N. Ndongeni- Human Resources office and  
Mr T. Mbukushe – Supply Chain Management office.

Phone: +27 (39) 255 8564/8556 Facsimile: +27 (39) 255 0167

Email: [Ndongeni.Nosisa @umzimvubu.gov.za](mailto:Ndongeni.Nosisa@umzimvubu.gov.za).

### **9.2 OTHER QUERIES**

Any other queries related to the bid must be addressed to the attention of the  
Municipal Manager, Mr G.P.T. Nota.

Erf 813 Main Street

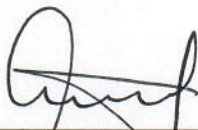
Private Bag X 9020

**MOUNT FRERE**

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Phone: +2739 255 8500

Fax: +2739 255 0167



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**MRS TT. MADOTYENI- NGCONGCA**  
**MANAGER: CORPORATE SERVICES**