



**UMZIMVUBU**  
— LOCAL MUNICIPALITY —

Person dealing with this matter: Mr. N. Zibi

Date: 11/11/2014

**Request for Quotation**

The Umzimvubu Local Municipality invites interested service providers to provide us with quotation **TO CONDUCT TRAINING ON RECORDS & ARCHIVE MANAGEMENT AND ELECTRONIC FILLING FOR 3 MUNICIPAL EMPLOYEES AS PER THE TERMS OF REFERENCE.**

**PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT OF 2011 WILL BE APPLYING AS FOLLOWS:**

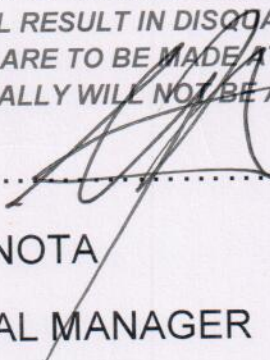
**PRICE: 80**

**BBB-EE: 20**

Closing Date for submissions is 20/11/2014 @ 12:00 noon.

For any enquiries and specification, please contact Supply Chain Management Office @ Tel: 039 255 8555.

*NB: NO QUOTATION(S) WILL BE CONSIDERED FROM PERSON(S) IN THE SERVICE OF THE STATE AND COMPAN(Y)NIES NOT REGISTERED IN THE ULM SUPPLIER DATABASE.  
THE FOLLOWING MUST BE ATTACHED: ORIGINAL OR CERTIFIED COPY OF THE CK DOCUMENT SHOWING ALL DIRECTORS, CERTIFIED COPY OF THE BBBEE VERIFICATION CERTIFICATE, DECLARATION OF INTEREST AND A VALID ORIGINAL SARS TAX CLEARANCE CERTIFICATE.  
FAILURE WILL RESULT IN DISQUALIFICATION.  
SUBMISSION ARE TO BE MADE AT THE QUOTATIONS BOX AT SCM OFFICE. QUOTES SUBMITTED ELECTRONICALLY WILL NOT BE ACCEPTED.*

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**MR GPT NOTA**  
**MUNICIPAL MANAGER**

813 Main Street, Mount Frere  
P/Bag 9020, Mt Frere, 5090  
T. 039 255 0166 | F. 039 255 0167  
[www.umzimvubu.gov.za](http://www.umzimvubu.gov.za)

**UPHULISO KUMNTU WONKE**



## **TERMS OF REFERENCE**

### **EXTERNAL TRAINING FOR UMZIMVUBU MUNICIPAL OFFICIALS ON RECORDS AND ARCHIVES MANAGEMENT COURSE**

#### ***PROGRAMME: RECORDS AND ARCHIVES MANAGEMENT COURSE***

#### **1. Background**

- 1.1 Umzimbubu 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 2014/15 financial year. The training needs identified by the employees are all entered in the approved 2014/15 Workplace Skills Plan which was also submitted to and approved by LGSETA.

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

- 2.1 Three (03) Employees who have requested the said training programme through filling the skills audit form in 2014/2015 financial year.

#### **3. Outcomes of the Training**

- 3.1 Records management explained in the context of municipal management information system
- 3.2 Understand how records management is described and explained in the context of information systems for municipalities.
- 3.3 Understand how the components of a formally established records management programme are listed and described to justify good records management practices.
- 3.4 Understand how the differences among the major methods used in management records in a municipality are identified to improve municipal management information system.

3.5 Understand how the concept and importance of knowledge management is described with examples related to records management.

3.6 Understand how the Operational and legal benefits of established records retention programme are explained to support sound management information system.

3.7 Understand how the steps involved in planning and development of a records retention programme are described to develop a sound information system.

3.8 Understand how the legal issues of records management retention programme are described with reference to access to information legislation.

3.9 Understand how the principles and practices of records retention decision making are described to demonstrate an understanding generally recognised practices associated with municipal record keeping.

3.10 Apply records protection and disaster recovery procedures.

3.11 Appreciate the need for important records and disaster recovery plans

3.12 Understand how the procedures used by a municipality to identify vital or important records are described with reference information safety and reliability.

3.13 Apply Concepts and techniques of protecting vital records in a municipality which support improved information standard operating procedures to support recover of data following a risk incident

**3.2 The content should cover but not limited the following aspects:-**

3.2.1 Municipal records management system

3.2.2 Municipal records retention programme

3.2.3 Records protection and disaster recovery procedures

3.2.4 How to apply filing systems in electronic records management

**4. Duration**

4.1 This exercise has to be done and completed within a maximum number of not more than five (05) days.



## **5. Methodology**

- 5.1 The course should be engaging and interactive.
- 5.2 Feedback and tips for improvement should be given to each of the participants.
- 5.3 This training programme should be delivered at a specified National Qualification Framework (NQF) and Unit standard aligned
- 5.4 The service provider must ensure that the competency assessment is done to all participants submitted their POEs.
- 5.5 Three (3) municipal employee will be trained on Advance Records and Archives Management training
- 5.6 The participant shall also be given training materials by the service provider.
- 5.8 To provide an Assessment Plan and assessment process during and after the training

## **6. PROPOSAL/ SUBMISSION REQUIREMENTS**

### **6.1 List of Contents**

All proposals must cover the following aspects of importance:

#### **6.1.1 A Detailed Company Profile**

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

#### **6.1.2 Proposed Methodology**

6.1.2.1 Service provider should come up with a sound and workable methods for the development of the above.

6.1.2.2 The service provider must ensure that candidates are registered to write exams (internationally)

### **6.1.3 Accreditation**

6.1.3.1 Each training provider must be accredited by the relevant Sector Education and Training Authority (SETA)

6.1.3.2 A copy of accreditation certificate, preferable a letter from the SETA specifying the areas of accreditation must be attached to the proposal.

### **6.1.4 Proposed Cost Structure**

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

### **6.1.5 Expertise Required:**

It is the responsibility of the appointed service provider to make a constant follow up on the submission of the certificates of the learners at least before six months.

### **6.1.6 Compulsory Terms and Conditions**

A proposal will not be considered unless the service provider furnishes the ULM with the duly completed documents mentioned below and 6.1.3 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) Proof Ownership
- b) Declaration of Interests
- c) Tax Certificate

6.1.7 The consortium submitting the proposal must declare any conflict of interests that it may have.

6.1.8 The ULM reserve the rights, not to accept any proposals in part or in whole

6.1.9 The ULM reserves the rights to suggest partnerships or joint venture to be formed between bidders, or that the assignment must be awarded to an exclusive BEE firm.



- 6.1.10 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 equitable.
- 6.1.11 Successful bidders will need to be prepared to commence work within 14 working days of being informed of the awarding of the tender.
- 6.1.12 Failure to comply with these conditions will result in the invalidation of the proposal and subsequent expulsion/termination from the process.
- 6.1.13 Successful bidder will be required to submit a detailed close-out report.
- 6.1.14 The guidelines contained in the Umzimvubu Local Municipality Supply Chain Management policy will apply.

## **6.2 Where to Submit:**

- 6.2.1 All submissions must be clearly marked:

### **“TRAINING OF MUNICIPAL EMPLOYEES ON ADVANCED RECORDS AND ARCHIVES MANAGEMENT”**

and be addressed for the attention of **the Municipal Manager, Mr G.P.T. Nota.**

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

- 6.2.3 It is compulsory to submit proposals to SCM and as per the advert.**

## **7. INFORMATION AND QUERIES**

### **7.1 TECHNICAL QUERIES**

To the attention of Mr. S Dinga-Human Resources Development office  
and Ms. A Ntongana –Supply Chain Management office

Phone : +2739 255 8563/8556

Fax : +2739 255 0167

Email: [dinga.sizwe@umzimvubu.gov.za](mailto:dinga.sizwe@umzimvubu.gov.za).

### **7.2 OTHER QUERIES**

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

813 Main Street  
Private Bag X 9020

**MOUNT FRERE**

5090

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