UMUZIWABANTU LOCAL MUNICIPALITY

BID NUMBER: UMUZ/13/2026

GENERAL VALUATION AND PREPARATION OF A VALUATION ROLL FOR IMPLEMENTATION 1 JULY 2028 AND PREPARATION AND UPDATING OF THE VALUATION ROLL FOR THE PERIOD 1 JULY 2028 TO 30 JUNE 2033

NAME OF BIDDER

_____

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A. GENERAL BID CONDITIONS AND INFORMATION

1. ADVERTISMENT

GENERAL VALUATION AND PREPARATION OF THE VALUATION ROLL FOR IMPLEMENTATION 1 JULY 2028 AND PREPARATION AND UPDATING OF VALUATION ROLLS FOR THE PERIOD 1 JULY 2028 TO 30 JUNE 2033

BID NUMBER: UMUZ/13/2026

UMUZIWABANTU MUNICIPALITY

ADVERTISEMENT OF BID NO. : UMUZ/13/2026

General Valuation, Preparation and Updating of Valuation Rolls

Bids are hereby invited from experienced and suitably qualified service providers to undertake a general valuation and compilation of a new valuation roll and subsequent updating of the valuation roll in terms of the Local Government Municipal Property Rates Act (ACT No 6 of 2004). The date of implementation of the new valuation roll is planned for 1 July 2028.

Bid documents can be obtained from the Supply Chain Management office at the Umuziwabantu Local Municipality Municipal Offices: 10 Murchison Street as from 26 October 2026, against the advance payment of a non-refundable bid document fee of R 500 per document. **No Bid document submission will be accepted, unless the bid document fee is receipted, and the Bid document attendance form is signed and date stamped by the municipality at the briefing session.**

Banking Details – The Umuziwabantu Local Municipality, First National Bank, account No. 6284 641 4936 (the proof of payment must reflect the bid number and bidder's name as reference. Enquiries: Ivor Ogle, ext 3552 or email to iogle@umuziwabantu.gov.za

A **compulsory briefing session is to be held on 10 November 2026 at 10:00 AM** in the Library Activity Boardroom at 10 Murchison Street, Harding, 4680 and only bidders with bid documents and the proof of payment will be permitted to attend the compulsory briefing session.

Completed Bids must be submitted in a sealed envelope labelled as per the format and text provided in the Bid Document Section "D" INSTRUCTIONS FOR COMPLETION OF AN ENVELOPE FOR TENDER and must be deposited in the Bid Box provided at the Municipal Offices, 10 Murchison Street, Harding, on or before **12H00 on 27 November 2026**, being the closing date and time. Bids will be opened in public, immediately thereafter. Telegraphic, telephonic, telex, facsimile, electronic and late bids will not be accepted. This invitation to bid is subject to the above Municipality's Preferential Procurement Guidelines and Bid documents must be completed fully and accurately to avoid being disqualified by the Umuziwabantu Local Municipality. The contract is beyond the three years covered in the annual budget of the municipality and the public is accordingly invited to comment on the proposed contract in terms of the Municipal Finance Management Act (MFMA) Section 33 and which comments must be submitted by ordinary mail within 14 days of this notice to the municipal manager. The bidder may be required to present their bid proposal in terms of the evaluation criteria on request by the Umuziwabantu Local Municipality.

The Umuziwabantu Local Municipality does not bind itself to accept the lowest or any bid and reserves the right to accept a bid in whole or any part. The municipality further reserves the right not to award this bid.

…….
MUNICIPAL MANAGER
UMUZIWABANTU LOCAL MUNICIPALITY

2. BRIBERY AFFIDAVIT

QUESTION:

Has the Bidder or any of its Directors been offered any bribe or made any promises that the project would be awarded fully or partially to the Bidder, by any Municipal Official/Councillor or anybody who may affect the outcome of the Bid?

YES/ NO : ……..

If yes, furnish particulars:

_____

_____

3. BID INFORMATION

1. The entire bid must be read in conjunction with the general bid conditions, the bid quotation document and the bid specification documents and all bids must be submitted on the official forms and documents,

2. This bid is subject to the preferential procurement policy framework act and the preferential procurement regulations, 2022, the general conditions of contract (gcc) and, if applicable, any other special conditions of contract,

3. No bids will be considered from persons in the service of the state (as defined in regulation 1 of the local government: municipal supply chain management regulations).

4. The following particulars must be furnished by the Bidder:

4.1 NAMEOF BIDDER.....…….....

4.2 POSTAL ADDRESS.....…….....

4.3 STREETADDRESS.....…….....

4.4 TELEPHONE NUMBER (with code) …….....

4.5 CELLPHONE NUMBER…….....

4.6 FACSIMILE NUMBER (with code) …….....

4.7 E-MAIL ADDRESS...…….....

4.8 VAT REGISTRATION NUMBER …….....

4.9 HAS AN ORIGINAL AND VALID TAX CLEARANCE CERTIFICATE BEEN ATTACHED? (MBD 2)

YES/NO……..

4.10 HAS A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE BEEN SUBMITTED? (MBD 6.1)

YES/NO ……

IF YES, WHO WAS THE CERTIFICATE ISSUED BY?

i) AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT

ii) A VERIFICATION AGENCY ACCREDITED BY THE SOUITH AFRICAN NATIONAL ACCREDITATION SYSTEM (SANAS) or

iii) A REGISTERED AUDITOR

……..

(A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE)

4.11 **TOTAL BID PRICE (INCLUDING VAT) (Total cost of Bid Part A + B + C - cross referenced to Section N of the bid quote document)**

R……..……..…… (……

……) **IN WRITING**.

5. Any enquiries regarding the bid may be directed to:

Municipality / Municipal Entity: Umuziwabantu Local Municipality

Department: Finance Budget and Treasury

Contact Person: Loyiso Ndawonde

Telephone number: 039 433 3565

E-mail: lndawonde@umuziwabantu.gov.za

6. The Umuziwabantu Local Municipality reserves the right to accept any Tender or part of any Tender and is not bound to accept the lowest tender or any other Tender.

7. No late, e-mailed, posted or faxed Bids will be accepted.

8. The Bid will be evaluated based on the Municipality's supply chain management policy, the Bid Documents and in terms of the 80/20 preference point system, where the 80 points are used for price and the 20 points are used for Specific goals.

SIGNATURE OF BIDDER ……..……

DATE……

CAPACITY UNDER WHICH THIS BID IS SIGNED……..

4. BID (TENDER) CONDITIONS

4.1 Bid (Tender) Documents

The words Bid and Tender have the same meaning and the successful Bidder/Tenderer will be required to sign a Service Level Agreement with the Umuziwabantu Local Municipality.

4.2 Completion of Specification Documents

(a) The original Tender Document must be completed fully in **black ink** and signed By the authorised signatory to validate the Tender. All the pages must be initialled The authorised signatory and returned. Failure to do so will result in the invalidation Of the Tender.

(b) The complete original Tender Document must be returned. Missing pages will result In the invalidation/disqualification of the Tender.

4.3 Alteration or Qualification of Tender

No unauthorised alteration of this set of Tender Documents will be allowed. Any unauthorised alteration will disqualify the Tender automatically. Any ambiguity has to be cleared with contact person for the Tender before the Tender closure.

4.4 Authorised Signatory

(a) A copy of the recorded Resolution taken by the Board of Directors, members, partners or trustees authorising the representative to submit this Tender on the Tenderer's behalf must be attached to the Tender Document on submission of same.

(b) A Tender shall be eligible for consideration only if it bears the signature of the Tenderer or of some person duly and lawfully authorised to sign it for and on behalf of the Tenderer.

4.5 Tax Clearance Certificate

(a) A valid original Tax Clearance Certificate must accompany the Tender documents. The onus is on the Tenderer to ensure that the Municipality has an original Tax Clearance Certificate on record and obtain confirmation from the Supply Chain Management Unit of the Municipality.

(b) Tenders not supported by a valid original Tax Clearance Certificate as an attachment to the Tender documents will be invalidated.

4.6 Evaluation of Bids/Tenders

Tenders will be evaluated in terms of their responsiveness to the tender specifications and requirements as well as such additional criteria as set out in this set of tender documents.

4.7 Acceptance or Rejection of a Bid/Tender

The Municipality reserves the right to withdraw any invitation to Tender and/or to re advertise or to reject any tender or to accept a part of it. The Municipality does not bind itself to accepting the lowest tender, or any tender.

4.8 Registration on Accredited Supplier Database

It is expected of all prospective service providers who are not yet registered on the Municipality's Accredited Supplier Database to register without delay on the prescribed form. The Municipality reserves the right not to award tenders to prospective suppliers who are not registered on the Database.

4.9 Site / Information Meetings

Site or information meetings, if specified, are compulsory and Bids/Tenders will not be accepted and disqualified if the Bidder has not attended the compulsory briefing, site or information meetings.

4.10 Stamp and Other Duties

The successful Tenderer will be liable for all duties and costs on legal documents resulting in the establishment of a contract and for the surety and retentions.

4.11 Language of Contract

The contract documents will be compiled in English and the English versions of all referred documents will be taken as applicable.

4.12 Procurement Policy

Tenders will be awarded in accordance with the Preferential Procurement Regulations, 2022 pertaining to the Preferential Procurement Policy Framework Act, No 5 of 2000.

4.14 Expenses Incurred in Preparation of Tender

The Municipality shall not be liable for any expenses incurred in the preparation and Submission of the tender.

4.15 Wrong Information Furnished

Where a contract has been awarded on the strength of the information furnished by the tenderer which, after the conclusion of the relevant agreement, is proved to have been incorrect, the Municipality may, in addition to any other legal remedy it may have, recover from the contractor all cots, losses or damages incurred or sustained by the Municipality as a result of the award of the contract.

4.16 Validity Period

Tenders shall remain valid for one twenty (120) days after the tender closure date.

4.17 Extension of Contract

The contract with the successful tenderer may be extended subject to Council approval and following the municipality's supply chain management policy, provided funds are available.

4.18 General and Special Conditions of Contract

The General Conditions of Contract as well as Special Conditions of Contract forming part of this set of tender documents will applicable to this tender in addition to the conditions of tenders.

4.19 Municipal Rates, Taxes and Charges

Any tenderer which is or whose directors are in arrears with their municipal rates and taxes or municipal charges due to any Municipality or any of its entities for more than Thirty days and have not settled before the tender closure date will be disqualified**.**

4.20 Contact with Municipality after Tender Closure Date

Bidders / Tenderers shall not contact the Umuziwabantu Municipality on any matter relating to their tender from the time of the opening of the tender to the time the contract is awarded. If a tenderer wishes to bring additional information to the notice of the Umuziwabantu Municipality, it should do so in writing to the Umuziwabantu Municipality. Any effort by the firm to influence the Umuziwabantu Municipality in the tender evaluation, tender comparison or contract award decisions may result in the rejection of the Tender.

5. STANDARD CONDITIONS OF CONTRACT

1 DEFINITIONS

1. The following terms shall be interpreted as indicated:

1.1 "Closing time" means the date and hour specified in the tendering documents for the receipt of tenders.

1.2 "*Contract*" means the written agreement entered into between the purchaser and the supplier, as recorded in the *contract* form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

1.3 "*Contract* price" means the price payable to the supplier under the *contract* for the full and proper performance of his contractual obligations.

1.4 "Corrupt practice" means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in *contract* execution.

1.5 "Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.

1.6 "Country of origin" means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.

1.7 "Day" means calendar day.

1.8 "Delivery" means delivery in compliance of the *conditions* of the *contract* or order.

1.9 "Delivery ex stock" means immediate delivery directly from stock actually on hand.

1.10 "Delivery into consignees store or to his site" means delivered and unloaded in the specified store or depot or on the specified site in compliance with the *conditions* of the *contract* or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.

1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.

1.12 "Force majeure" means an event beyond the control of the supplier and not involving the supplier's fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.

1.13 "Fraudulent practice" means a misrepresentation of facts in order to influence a procurement process or the execution of a *contract* to the detriment of any tenderer, and includes collusive practice among tenderers (prior to or after Tender submission) designed to establish tender prices at artificial non-competitive levels and to deprive the tenderer of the benefits of free and open competition.

1.14 "GCC" means the *General Conditions* of *Contract.*

1.15 "Goods" means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the *contract.*

1.16 “Imported content” means that portion of the tendering price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the Tender will be manufactured.

1.17 “Local content” means that portion of the tendering price which is not included in the imported content provided that local manufacture does take place.

1.18 “Manufacture” means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.

1.19 “Order” means an official written order issued for the supply of goods or works or the rendering of a service.

1.20 “Project site,” where applicable, means the place indicated in tendering documents.

1.21 “Purchaser” means the organization purchasing the goods.

1.22 “Republic” means the Republic of South Africa.

1.23 “SCC” means the **Special Conditions of Contract**.

1.24 “Services” means those functional services ancillaries to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the **contract.**

1.25 “Supplier” means the successful tenderer who is awarded the contract to maintain and Administer the required and specified service(s) to the State.

1.26 “Tort” means in breach of contract.

1.27 “Turnkey” means a procurement process where one service provider assumes total responsibility for all aspects of the project and delivers the full end product/service required by the contract.

1.28 “Written” or “in writing” means handwritten in ink or any form of electronic or mechanical writing.

2. APPLICATION

2.1 These **general conditions** are applicable to all tenders, contracts and orders including tenders for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the tendering documents.

2.2 Where applicable, special **conditions** of **contract** are also laid down to cover specific supplies, services or works.

2.3 Where such special *conditions* of **contract** are in conflict with these **general conditions**, the special **conditions** shall apply.

3. GENERAL

3.1 Unless otherwise indicated in the tender documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a tender. Where applicable a non-refundable fee for documents may be charged.

3.2 With certain exceptions, invitations to tender are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from www.treasury.gov.za

4. STANDARDS

4.1 The goods supplied shall conform to the standards mentioned in the tender documents and specifications.

5. USE OF CONTRACT DOCUMENTS, INFORMATION AND INSPECTION.

5.1 The supplier shall not, without the purchaser's prior written consent, disclose the **contract**, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the **contract**. Disclosure to any such employed person shall be made in confidence and shall extend only as far as may be necessary for purposes of such performance.

5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause except for purposes of performing the **contract.**

5.3 Any document, other than **the contract** itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the **contract** if so required by the purchaser.

5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

6. PATENT RIGHTS

6.1 The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by the purchaser.

7. PERFORMANCE SECURITY

7.1 Within thirty (30) days of receipt of the notification of **contract** award, the successful tenderer shall furnish to the purchaser the performance security of the amount specified in SCC.

7.2 The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the **contract.**

7.3 The performance security shall be denominated in the currency of the **contract** or in a freely convertible currency acceptable to the purchaser and shall be in one of the following forms:

(a) A bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the tender documents or another form acceptable to the purchaser; or

(b) A cashier's or certified cheque

7.4 The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the **contract**, including any warranty obligations, unless otherwise specified in SCC.

8. INSPECTIONS, TESTS ANALYSES

8.1 All pre-tendering testing will be for the account of the tenderer.

8.2 If it is a tender condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the tenderer or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.

8.3 If there are no inspection requirements indicated in the tendering documents and no mention is made in the **contract**, but during the **contract** period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.

8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the goods to be in accordance with the **contract** requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.

8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the **contract** requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.

8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the **contract** requirements may be rejected.

8.7 Any **contract** supplies may on or after delivery be inspected, tested or analysed and may be rejected if found not to comply with the requirements of the **contract.** Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them Immediately at his own cost and forthwith substitute them with goods, which do comply with the requirements of the **contract.** Failing such removal the rejected goods shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected goods, purchase such goods as may be necessary at the expense of the supplier.

8.8 The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the **contract** on account of a breach of the **conditions** thereof, or to act in terms of Clause 23 of GCC.

9. PACKING

9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the **contract**. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the **contract,** including additional requirements, if any, specified in SCC, and in any subsequent Instructions ordered by the purchaser.

10. DELIVERY AND DOCUMENTS

10.1 Delivery of the goods and arrangements for shipping and clearance obligations shall be made by the supplier in accordance with the terms specified in the **contract.**

11. INSURANCE

11.1 The goods supplied under the **contract** shall be fully insured in a freely convertible currency against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified.

12. TRANSPORTATION

12.1 Should a price other than an all-inclusive delivered price be required, this shall be specified.

13. INCIDENTAL SERVICES

13.1 The supplier may be required to provide any or all of the following services, including additional services, if any:

(a) Performance or supervision of on-site assembly and/or commissioning of the supplied goods;
(b) Furnishing of tools required for assembly and/or maintenance of the supplied goods;
(c) Furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
(d) Performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this **contract;** and
(e) Training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

13.2 Prices charged by the supplier for incidental services, if not included in the **contract** price for the goods shall be agreed upon in advance by the parties and shall not exceed the prevailing rates charged to other parties by the supplier for similar services.

14. SPARE PARTS

14.1 As specified, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:

(a) Such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the **contract;**and;

(b) In the event of termination of production of the spare parts:

(i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
(ii) Following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

15. WARRANTY

15.1 The supplier warrants that the goods supplied under the **contract** are new, unused, of the most recent or current models and those they incorporate all recent improvements in design and materials unless provided otherwise in the **contract**. The supplier further warrants that all goods supplied under this **contract** shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the **conditions** prevailing in the country of final destination.

15.2 This warranty shall remain valid for twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the **contract,** or for eighteen (18) months after the date of shipment from the port or placeof loading in the source country, whichever period concludes earlier, unless specified otherwise.

15.3 The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.

15.4 Upon receipt of such notice, the supplier shall, within the period specify and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the purchaser.

15.5 If the supplier, having been notified, fails to remedy the defect(s) within the period specified, the purchaser may proceed to take such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the **contract.**

16. PAYMENT

16.1 The method and **conditions** of payment to be made to the supplier under this **contract** shall be specified in SCC.

16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfilment of other obligations stipulated in the **contract.**

16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.

16.4 Payment will be made in Rand unless otherwise stipulated in SCC.

17. PRICES

17.1 Prices charged by the supplier for goods delivered and services performed under the **contract** shall not vary from the prices quoted by the supplier in his Tender, with the exception of any price adjustments authorized or in the purchaser's request for Tender validity extension, as the case may be.

18. VARIATION ORDERS

18.1 The Bid/Tender is a fixed price Bid/Tender with no variations anticipated and escalations built into the price.

19. ASSIGNMENT

19.1 The supplier shall not assign, in whole or in part, its obligations to perform under the **contract,** except with the purchaser's prior written consent.

20. SUBCONTRACTS

20.1 The supplier shall notify the purchaser in writing of all subcontracts notification, in the original Tender or later, shall not relieve the supplier from any liability or obligation under the **contract.**

21. DELAYS IN THE SUPPLIER'S PERFORMANCE

21.1 Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the **contract.**

21.2 If at any time during performance of the **contract,** the supplier or its subcontractor(s) should encounter **conditions** impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, it's likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of **contract**.

21.3 The right is reserved to procure outside of the **contract** small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.

21.4 Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.

21.5 Upon any delay beyond the delivery period in the case of a **supplies contract,** the purchaser shall, without cancelling the **contract,** be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the **contract** and to return any goods delivered later at the supplier's expense and risk, or to cancel the **contract** and buy such goods as may be required to complete the **contract** and without prejudice to his other rights, be entitled to claim damages from the supplier.

22. PENALTIES

22.1 Subject to GCC Clause 25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the **contract,** the purchaser shall, without prejudice to its other remedies under the **contract**, deduct from the **contract** price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the **contract** pursuant to GCC Clause 23.

23. TERMINATION FOR DEFAULT

23.1 The purchaser, without prejudice to any other remedy for breach of **contract**, by written notice of default sent to the supplier, may terminate this **contract** in whole or in part:

(a) If the supplier fails to deliver any or all of the goods within the period(s) specified in the **contract**, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
(b) If the Supplier fails to perform any other obligation(s) under the **contract;** or
(c) If the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the **contract.**

23.2 In the event the purchaser terminates the **contract** in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shallcontinue performance of the **contract** to the extent not terminated.

23.3 Where the purchaser terminates the **contract** in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.

23.4 If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard the intended penalty as not objected against and may impose it on the supplier.

23.5 Any restriction imposed on any person by the purchaser will, at the discretion of the purchaser, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the purchaser actively associated.

23.6 If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:

The name and address of the supplier and / or person restricted by the purchaser;
(ii) The date of commencement of the restriction
(iii) The period of restriction; and
(iv) The reasons for the restriction.

These details will be loaded in the National Treasury's central database of suppliers or persons prohibited from doing business with the public sector.

23.7 If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.

24. ANTI-DUMPING AND COUNTERVAILING DUTIES AND RIGHTS

24.1 When, after the date of tender, provisional payments are required, or anti-dumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, the State is not liable for any amount so required or imposed or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable difference shall on demand be paid forthwith by the supplier to the purchaser may deduct such amounts from moneys (if any) which may otherwise be due to the supplier in regard to goods or services which he delivered or rendered, or is to deliver or render in terms of the **contract** or any other **contract** or any other amount which may be due to him.

25. FORCE MAJEURE

25.1 Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the **contract** is the result of an event of force majeure.

25.2 If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the **contract** as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

26. TERMINATION FOR INSOLVENCY

26.1 The purchaser may at any time terminate the **contract** by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the purchaser.

27. SETTLEMENT OF DISPUTES

27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the **contract**, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.

27.2 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter maybe commenced unless such notice is given to the other party.

27.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.

27.4 Notwithstanding any reference to mediation and/or court proceedings herein,

(a) The parties shall continue to perform their respective obligations under the **contract** unless they otherwise agree; and

(b) The purchaser shall pay the supplier any monies due the supplier for goods delivered and / or services rendered according to the prescripts of the contract.

28. LIMITATION OF LIABILITY

28.1 Except in cases of criminal negligence or wilful misconduct, and in the case of infringement pursuant to Clause 6;

(a) The supplier shall not be liable to the purchaser, whether in **contract**, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and

(b) The aggregate liability of the supplier to the purchaser, whether under the **contract**, in tort or otherwise, shall not exceed the total **contract** price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

29. GOVERNING LANGUAGE

29.1 The **contract** shall be written in English. All correspondence and other documents pertaining to the **contract** that is exchanged by the parties shall also be written in English.

30. APPLICABLE LAW

30.1 The **contract** shall be interpreted in accordance with South African laws, unless otherwise specified.

31. NOTICES

31.1 Every written acceptance of a tender shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his Tender or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice

31.2 The time mentioned in the **contract** documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

32. TAXES AND DUTIES

32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.

32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.

32.3 No **contract** shall be concluded with any tenderer whose tax matters are not in order. Prior to the award of a Tender SARS must have certified that the tax matters of the preferred tenderer are in order.

32.4 No contract shall be concluded with any tenderer whose municipal rates and taxes and municipal service charges are in arrears.

33. TRANSFER OF CONTRACTS

33.1 The contractor shall not abandon, transfer, cede assign or sublet a contract or part thereof without the written permission of the purchaser.

34. AMENDMENTS OF CONTRACTS

34.1 No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid and of any force unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing, shall also be in writing.

35. PROHIBITION OF RESTRICTIVE PRACTICES

35.1 In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a tenderer (s) is / are or a contractor(s) was / were involved in collusive Tendering.

35.2 If a tenderer(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in section 59 of the Competition Act No. 89 of 1998.

35.3 If a tenderer(s) or contractor(s), has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the tender(s) for such item(s) offered, and / or terminate the **contract** in whole or part, and / or restrict the tenderer(s) or contractor(s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the tenderer(s) or contractor(s) concerned.

6. DECLARATION OF ORGANIZATION: BIDDERS/TENDERERS INFORMATION

COMPLETE AS FULLY AS POSSIBLE, WHERE APPLICABLE

DATABASE: CONSULTANTS, SUPPLIERS AND SERVICES PROVIDERS (PROFESSIONAL AND NON-PROFESSIONAL)

1. NAME OF COMPANY

2. ADDRESS: PHYSICAL

POSTAL

CODE

WEBSITE
http

E-MAIL

2.1 LOCAL PHYSICAL ADDRESS IN KZN
(If applicable)

CODE

CONTACT PERSON (NAME & DETAILS)

TELEPHONE

FAX

CELL PHONE

LOCAL PHYSICAL ADDRESS IN UMUZIWABANTU LOCAL MUNICIPALITY

CODE

CONTACT PERSON
(NAME & DETAILS)

TELEPHONE FAX

CELL PHONE

3. SECTOR (e.g. Consultant)

3.1 NATURE OF BUSINESS

(E.g. Town & Regional Planning)

4. REGISTERED AS:

☐ CLOSE CORPORATION ☐ PTY LTD COMPANY ☐ CO-OPERATIVE

☐ SOLE TRADER ☐ LTD COMPANY

☐ PARTNERSHIP ☐ NOT REGISTERED

4.1 REGISTERED NO.
(if applicable)

5. VAT REGISTRATION NO.
(If applicable) (Attach Certified Copy)

5.1 RATES & SERVICES
ACCOUNT NO.
(Umuziwabantu Local Municipality)

a. ANNUAL SALES/TURNOVER (Previous Financial Year)

20..... R.....

20..... R.....

6. TOTAL ASSETS (Previous Financial Year)

20..... R.....

20..... R.....

7. CURRENT CONTRACTS WITH UMUZIWABANTU LOCAL MUNICIPALITY

CONTRACT NO	1.	2.	3.
DURATION			

APPROXIMATE VALUE			
DATES CONTRACTS WERE SIGNED			
PAYMENT TERMS			

8. PREVIOUS CONTRACTS WITH UMUZIWABANTU LOCAL MUNICIPALITY
(Last Financial Year Only)

CONTRACT NO			
APPROXIMATE VALUE			

9. NAME AND ADDRESS OF AUDITORS/ACCOUNTING OFFICERS

NAME	
ADDRESS	
CODE	

10. PROFESSIONALS ATTACHED TO THE CONCERN WITH QUALIFICATIONS
(Name and Qualification)

Initials	Surname	Qualifications

11. NAMES AND NUMBERS OF DIRECTORS/PARTNERS/MEMBERS

	Initials	Surname	Sex	%
11.1				
11.2				
11.3				
11.4				

	Initials	Surname	Sex	%
11.5				
11.6				
11.7				

12. INDICATE ON WHICH DATE YOUR BUSINESS STARTED ITS CURRENT TYPE OF BUSINESS. | | | | | | | | | |

* SIPRO REGISTRATION CERTIFICATE MUST BE ADDED TO THIS PAGE.

WE THE ABOVE DIRECTORS / PARTNERS / MEMBERS, HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT.

SIGNATURE _____ DATE:_____

(ADDITIONAL INFORMATION MAY BE ATTACHED IF NECESSARY)

7. AUTHORITY OF SIGNATORY

Signatories for companies must establish their authority by attaching to this form, a copy of the relevant resolution of the board of directors, duly signed and dated.

An example as shown below:

"By resolution of the board of directors taken on _____20 _____

Mr/Me _____

Has been duly authorised to sign all documents in connection with this Tender for contract and any contract which may arise there from on behalf of

(BLOCK CAPITALS) _____

_____

_____

_____

_____

SIGNED ON BEHALF OF THE COMPANY : _____

IN HIS CAPACITY AS : _____

DATE : _____

SIGNATURE OF SIGNATORY : _____

8. FINANCIAL STATEMENTS & BANK REFERENCE

I/We, the undersigned do hereby certify as follows:

A Financial Statements

I/We agree, if required, to furnish an audited copy of the latest set of financial statements together with my/our Directors' and Auditors' report for consideration by the Employer, when requested

B Bank Reference

I/We furnish the following information:

i. Banker's name : _____

ii. Banker's address : _____

_____

iii. Banker's Tel No : _____

iv. Branch Code : _____

v. Branch Name : _____

C Account Details

i. Account Number : _____

ii. Account Name : _____

iii. Account type

Savings	Cheque	Other (specify)

D. Bank assessment code

Bank Classification:

Bank Codes: Code A
Unreserved for the amount mentioned.
This code is obtained in the case of excellent businesses with unreserved financial positions.
This code is very seldom obtained.

Bank Codes: Code B
Good for the amount mentioned if for business purposes.
It is obtained if the client has a good record and has met his obligations without exception.

Bank Codes: Code C
Good for the amount mentioned provided and it is strictly for business purposes.
This is the report that is generally used, and indicates that the client has a good record and qualifies for a B code, but the amount mentioned may appear high in the case of business requirements.

Bank Codes: Code D
Good for authorized business requirements and a reasonable business risk for the amount mentioned.
This is obtained when a client handles an account in a satisfactory manner, but on a small scale.

Bank Codes: Code E
Amount is regarded as too high.
This means that the amount is too high relative to the client's financial capabilities.

Bank Codes: Code F
Financial position unknown.
This is obtained if the credit information available to the bank is insufficient for expressing an opinion.

Bank Codes: Code G
Cheques are sporadically dishonored.

Bank Codes: Code H
Cheques are frequently dishonored.

Full General Report
A "Full General" report is requested when the credit assessors so decides, and is requested and completed in writing.

Attach the original and stamped bank reference letter to this page. The letter must clearly indicate the status code for the Tender amount for this Tender.

Furthermore, I/We hereby authorize the Employer to approach the above bank for authentication of above statement, or a reference.

_____ _____
SIGNATURE OF BIDDER/TENDERER DATE

9. SCHEDULE OF PREVIOUS SIMILAR CONTRACTS COMPLETED

The Tenderer must insert in the space provided below, a complete list of at least five (5) years similar contracts awarded to him, **relevant and similar to this contract**. This information shall be deemed to be material to the awarding of the contract.

DESCRIPTION OF WORK COMPLETED (LAST FIVE YEARS)	VALUE OF CONTRACT	CLIENT (Name)	CLIENT (Tel, Fax)	DATE COMPLETED

SIGNATURE OF BIDDER/TENDERER **DATE**

10. DECLARATION BY BIDDER IN TERMS OF SUPPLY CHAIN MANAGEMENT POLICY

No.	DESCRIPTION	YES	NO
1	The Bidder/Tenderer declares that the bidder and its Directors have no outstanding tax obligations in accordance with the South African Revenue Services requirements. An original tax clearance certificate must be included in the Bid issued by the South African Revenue Service.		
2.	The Bidder/Tenderer declares that the bidder and its Directors DO NOT owe any outstanding amounts for municipal rates and taxes or municipal services charges to the relevant municipality or municipal entity, or to any other municipality or municipal entity.		
3.	The Bidder/Tenderer declares that it has performed and delivered satisfactorily on previous contracts awarded to it by the municipality or entity or any other organ of state.		
4.	The Bidder/Tenderer declares that Bidder and its Directors have NOT committed a corrupt or fraudulent act in competing for the Bid/Tender.		
5.	The Bidder/Tenderer declares that Bidder and its Directors have NOT committed a corrupt or fraudulent act during the tendering process.		
6.	The Bidder/Tenderer declares that Bidder and its Directors have NOT committed a corrupt or fraudulent act during the tendering process of the contract that will benefit the Bidder / Tenderer its Directors or any official.		
7.	The Bidder/Tenderer declares that Bidder and its Directors have NOT abused the Supply Chain Management System of the Municipality or municipal entity and have NOT committed any improper conduct in relation to such system.		
8.	The Bidder/Tenderer declares that Bidder and its Directors have NOT been convicted for fraud or corruption during the past five years.		
9.	The Bidder/Tenderer declares that Bidder and its Directors have NOT wilfully neglected reneged or failed to comply with any government, municipal or other public sector contract during the past five years.		
10.	The Bidder/Tenderer declares that Bidder and its Directors have NOT been listed in the Register for Tender Defaulters in terms of Section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).		
11.	Is the Bidder/Tenderer, (who is or is not a natural person, of which any Director; Manager; major shareholder or stakeholder) :-		
11.1	A member of any municipal council, any provincial legislature or the National Assembly or the National Council of Provinces; an official of any municipality of municipal entity;		
11.2	An employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act. No. 1 of 1999);		
11.3	A member of the board of directors of any municipal entity or a member of the accounting authority of any national or provincial public entity;		
11.4	An employee of Parliament or a provincial legislature; or an advisor or consultant who has an interest in the Supply Chain Management System or in any way participates in the final decision making process.		

Declaration to be signed under a commissioner of oaths – see page 32

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

NAME OF BIDDER	**DESIGNATION OF SIGNATORY**
SIGNATURE OF AUTHORISED PERSON	**DATE**
WITNESSES 1	**WITNESSES 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

NAMES AND NUMBERS OF DIRECTORS/PARTNERS/MEMBERS

	Initials	Surname	Signature	Date
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				

NOTE: SAME INFO AS PER ITEM 11.0 ON ANNEXURE A

WE THE ABOVE DIRECTORS / PARTNERS / MEMBERS, HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT.

11. CERTIFICATE OF INDEPENDENT TENDER DETERMINATION (MBD 9)

1 This Municipal Tendering Document (MBD) must form part of all Tenders[1] invited.

2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive Tendering (or Tender rigging).[2] Collusive Tendering is a *per se* prohibition meaning that it cannot be justified under any grounds.

3 Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:

a. Take all reasonable steps to prevent such abuse;

b. Reject the Tender of any Tenderer if that Tenderer or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and

c. Cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the Tendering process or the execution of the contract.

4 This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when Tenders are considered, reasonable steps are taken to prevent any form of Tender-rigging.

5 In order to give effect to the above, the attached Certificate of Tender Determination (MBD 9) must be completed and submitted with the Tender:

[1] Includes price quotations, advertised competitive Tenders, limited Tenders and Tenders.
[2] Tender rigging (or collusive Tendering) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a Tendering process. Tender rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT TENDER DETERMINATION

I, the undersigned, in submitting the accompanying Tender:

_____
(Tender Number and Description)

in response to the invitation for the Tender made by:

UMUZIWABANTU LOCAL MUNICIPALITY

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of:_____that:
(Name of Tenderer)

1. I have read and I understand the contents of this Certificate;

2. I understand that the accompanying tender will be disqualified if this Certificate is found not to be true and complete in every respect;

3. Am authorized by the tenderer to sign this Certificate, and to submit the accompanying tender, on behalf of the tenderer;

4. Each person whose signature appears on the accompanying tender has been authorized by the tenderer to determine the terms of, and to sign, the tender, on behalf of the tenderer;

5. For the purposes of this Certificate and the accompanying tender, I understand that the word "competitor" shall include any individual or organization, other than the tenderer, whether or not affiliated with the tenderer, who:

   (a) Has been requested to submit a tender in response to this tender invitation;

   (b) Could potentially submit a tender in response to this tender invitation, based on their qualifications, abilities or experience; and

   (c) Provides the same goods and services as the tenderer and/or is in the same line of business as the tenderer

6. The tenderer has arrived at the accompanying tender independently from, and without Consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium[3] will not be construed as collusive tendering.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

   (a) Prices;

   (b) Geographical area where product or service will be rendered (market allocation)

   (c) Methods, factors or formulas used to calculate prices;

   (d) The intention or decision to submit or not to submit, a tender;

   (e) The submission of a tender which does not meet the specifications and

conditions of the tender; or

(f) Tendering with the intention not to win the tender.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this tender invitation relates.

9. The terms of the accompanying tender have not been, and will not be, disclosed by the tenderer, directly or indirectly, to any competitor, prior to the date and time of the official tender opening or of the awarding of the contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1988 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 0f 2004 or any other applicable legislation.

……	……..
Signature	Date
……	……..…
Position	Name of Tenderer

[3] Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, and skill and knowledge in an activity for the execution of a contract.

B – BID QUOTATION DOCUMENT

UMUZIWABANTU LOCAL MUNICIPALITY

BID QUOTATION DOCUMENTATION

BID NUMBER: UMUZ/13/2026

GENERAL VALUATION AND PREPARATION OF A VALUATION ROLL FOR IMPLEMENTATION 1 JULY 2028 AND PREPARATION AND UPDATING OF THE VALUATION ROLL FOR THE PERIOD 1 JULY 2028 TO 30 JUNE 2033

NAME OF BIDDER: ……

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SECTION A: SUMMARY OF BID AND ENQUIRIES

SECTION B: CONDITIONS OF BID

SECTION C: INSTRUCTIONS FOR COMPLETION AND SUBMISSION OF BID

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SECTION E: INSTRUCTIONS FOR DELIVERY OF QUOTATION

SECTION F: COMPULSORILY BRIEFING SESSION

SECTION G: COMPULSORILY BRIEFING SESSION ATTENDANCE CERTIFICATE

SECTION H: HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS REQUIRED TO QUALIFY AS A BIDDER

SECTION I: AUTHORITY TO SIGN A BID

SECTION J: AFFIDAVIT, NOMINATION AND DECLARATION OF MUNICIPAL VALUER

SECTION K: AFFIDAVIT, NOMINATION AND DECLARATION OF ASSISTANT MUNICIPAL VALUER

SECTION L: AFFIDAVIT, NOMINATION AND DECLARATION OF GIS AND DATA MANAGER

SECTION M: AFFIDAVIT, NOMINATION AND DECLARATION OF PROJECT MANAGER

SECTION N: PRICING SCHEDULE AND PROJECT WORK PROGRAM

SECTION O: DECLARATION OF COMPUTER EQUIPMENT, SOFTWARE AND INFORMATION TECHNOLOGY SYSTEMS

SECTION P: DECLARATION OF INTEREST

SECTION Q: TAX CLEARANCE CERTIFICATE REQUIREMENTS

SECTION R: DECLARATION WITH REGARD TO PREFERENTIAL POINTS

SECTION S: DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

SECTION T: CORRECTNESS OF INFORMATION SUPPLIED IN THIS DOCUMENT

SECTION U: CONTACT DETAILS OF BIDDER

SECTION A
SUMMARY OF BID AND ENQUIRIES

THIS QUOTATION CLOSES AT	:	12:00
CLOSING DATE	:	27 November 2026
BID NUMBER	:	UMUZ/13/2026
DESCRIPTION	:	GENERAL VALUATION AND PREPARATION OF A VALUATION ROLL FOR IMPLEMENTATION 1 JULY 2028 AND PREPARATION AND UPDATING OF THE VALUATION ROLL FOR THE PERIOD 1 JULY 2028 TO 30 JUNE 2033.
CONTRACT PERIODS	:	General valuation and preparation of a valuation roll from the effective date of the signed Memorandum of Agreement with the Service Provider to 30 June 2028 and
	:	Preparation and updating of the Valuation roll from 1 July 2028 to 30 June 2033, based on a valuation date of 1 July 2028 or such other date set by the municipality.
	:	*The Umuziwabantu Municipality does not bind itself to accept the lowest or any bid and reserves the right to accept a bid in whole or any part. The municipality further reserves the right not to award this bid.*
VALIDITY PERIOD	:	120 DAYS
NAME OF BIDDER	:	……....
BID ENQUIRIES	:	Ivor Ogle
TELEPHONE NUMBER	:	039 433 3552
PROCUREMENT ENQUIRIES	:	Loyiso Ndawonde
TELEPHONE NUMBER	:	039 433 3565

SECTION B
CONDITIONS OF BID

1. _____ bids to supply all the services described in the BID Specification Document to the Umuziwabantu Local Municipality (hereafter referred to as the Municipality).
2. _____ (hereafter referred to as the bidder) agrees to the following:

(a) The bid price must remain valid for a period of 120 days calculated from the closing time of the bid;

(b) The offer shall be open for acceptance by the Municipality during the 120 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 Municipal Supply Chain Management Regulations, 2005 (Regulation R. 868 of 2005), the Municipality's supply chain management policy and the agreement between the bidder and the Municipality, if the tender is awarded to_____;

(d) If the bidder withdraws its bid within the period for which the bidder has agreed that the bid shall remain open for acceptance, or fail to fulfil the contract when called upon to do so, the Municipality may, without prejudice to its other rights, agree to the withdrawal of the bid or cancel the contract that may have been entered into between the bidder and the Municipality;

(e) If the bidder withdraws its bid within the period for which the bidder has agreed that the bid shall remain open for acceptance, the bidder will pay the Municipality any additional expenses incurred by the Municipality having either to accept a less favourable bid or, if fresh bids have to be invited, the additional expenditure incurred by the invitation of fresh bids;

(f) The 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;

(h) That the municipality may if required call upon the bidder to present the bidder's proposal to support of the bidder's bid.

(h) The law of the Republic of South Africa shall govern the contract created by the acceptance of the bidder's bid and the bidder chooses *domicilium citandi et executani* in the Republic at (full physical address) :

.....

.....

.....

3. The bidder confirms that it has satisfied itself as to the correctness and validity of its bid: that the prices, rates and preference quoted cover all of the items and the bidder's obligations under a resulting contract, and it 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 the bidder under this agreement, as the Principals liable for the due fulfilment of this contract.

5. The declarant agrees that any action arising from this contract may in all respects be instituted against him and the bidder, and hereby undertake to satisfy fully any sentence or judgement which may be pronounced against them as a result of such action.

6. The declarant confirms that the bidder has declared all and any interest that it 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.

NAME OF DECLARANT	**NAME OF BIDDER**
SIGNATURE OF DECLARANT	**DATE**

SECTION C
INSTRUCTIONS FOR COMPLETION AND SUBMISSION OF BID

1. A 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 initialled.

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. 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 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 telefax, telegraphic or other electronic means will be rejected.

14. Bids will be opened in public at 12h00 on 27 November 2026, in the Umuziwabantu Municipality's registry office immediately after closing.

15. Where practical, prices are made public at the time of opening bids.

16. The Umuziwabantu Municipality is not compelled to accept the lowest or any bid and may accept any part of a bid. The municipality further reserves the right not to award this 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: _____

PO Box _____

_____

_____

Bid Number: _____

Description: GENERAL VALUATION AND PREPARATION OF THE VALUATION ROLL FOR IMPLEMENTATION 01 July 2028 AND PREPARATION AND UPDATING OF VALUATION ROLLS FOR THE PERIOD 1 July 2028 to 30 June 2033.

Closing date: **27 November 2026**

Closing time: 12:00

REVERSE SIDE OF ENVELOPE

Municipality's details and address:

The Municipal Manager
Umuziwabantu Municipality
10 Murchison Street
Harding
4680

SECTION E
INSTRUCTIONS FOR DELIVERY OF QUOTATION

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

UMUZIWABANTU MUNICIPALITY **10 Murchison Street** **Harding** **4680**	**THE BID BOX IS AVAILABLE ON THE FOLLOWING DAYS AND TIMES:** **MONDAYS TO FRIDAY: 8:00am – 16:00pm** **and up to 12H00 on the 27 November 2026.**

SECTION F
COMPULSORY BRIEFING SESSION

1. There will be a compulsory briefing session to inform potential bidders of the scope of work and related matters like time frames which need to be met.

2. The details of the briefing session are as following:

   DATE : 10 November 2026
   TIME : 10:00
   VENUE : Library Activity Room, 10 Murchison Street, Harding

3 Bidders who are not aware of how to get to the venue or where the briefing session will be held must contact Ivor Ogle on 039 433 3552 for directions.

4. Bidders are to ensure that the briefing session certificate contained in the bid document is signed at the meeting. Failure to do so will invalidate the bid.

SECTION G

COMPULSORY 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. This is to certify I have attended the compulsory 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 OFFICIALSTAMP

SECTION H

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

1. The Bidder must provide registered and experienced human resources, systems and documents and must demonstrate sufficient experience and ability in the bid project deliverables and scope of work in order to qualify as a Bidder.

2. The Bidder must prepare and submit its human resource plan with roles and responsibilities to support the delivery of the bid and scope of work. A curriculum vitae and professional registration certificates of the professionally registered resources listed on the plan and their acceptance to be named on this bid, must accompany the resource plan.

3. The Bidder must submit proof of Professional Indemnity Insurance for the nominated professional persons held by the Bidder up to the Bid Contract price tendered.

4 The Bidder must submit proof of Public Liability Insurance held by the Bidder up to the Bid Contract price tendered.

5. The evaluation criteria will be in terms of Annexure “L” of the bid documents relating to functionality whereby bidders must obtain a minimum of 70% to qualify for evaluation.

6. Bids of Bidders who do not meet the minimum qualifications, experience or systems requirements or which are incomplete will be rejected.

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS	CRITERIA TO BE VERIFIED
SECTION B	Acceptance of Bid conditions	Acceptance of Bid conditions
SECTION G	Compulsory briefing session attendance certificate	Attendance at compulsory briefing session

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS	CRITERIA TO BE VERIFIED
SECTION H	1 & 2. Human resource plan must be provided in accordance with the bid with CV's to support the delivery of the bid and scope of work.	# 1 & 2 Resource Plan provided to support the bid scope of work # 1 & 2 Copy of CV's per resource recorded on the resource plan # 1 & 2 Proof of acceptance by the resource to be named in the bid by the resource
	1 & 2 The bidder must provide a least two contactable references from municipalities where the bidder carried out and implemented a general valuation successfully in terms of the MPRA	# 1 & 2 Proof of two contactable references submitted
	3. Professional Indemnity insurance of professional resources to an amount up to the Bid Contract price tendered.	3. Proof of Valid Professional Indemnity Insurance for Professional resources listed on the resource plan to an amount up to the Bid Contract price tendered.
	4. Public Liability Insurance to an amount up to the Bid Contract price tendered.	4. Proof of valid public liability insurance to an amount up to the Bid Contract price tendered.
SECTION I	Authority to sign Bid	Certified copy of resolution from the Bidder

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS	CRITERIA TO BE VERIFIED
SECTION J	AFFIDAVIT, NOMINATION AND DECLARATION OF 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	1. Professional Valuer or Professional Associated Valuer (with no restrictions) and with more than 5 years of experience in performing the functions of a municipal Valuer as contemplated in section 34 of the MPRA. 2. Detailed CV with relevant and proven property valuation knowledge and experience as municipal Valuer performing mass valuations. 3. Affidavit by a Municipal Valuer signed by a Commissioner of Oaths. 4. Certified copy of a valid South African Council for the Property Valuers Profession registration certificate, registered as a professional Valuer or professional associated Valuer (with no restrictions). 5. Joint Venture agreement signed by Service provider and municipal Valuer where applicable. 6. References contacted and verified with proven experience as claimed in the CV.

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS	CRITERIA TO BE VERIFIED
SECTION K	AFFIDAVIT, NOMINATION AND DECLARATION OF ASSISTANT MUNICIPAL VALUER The bidder must submit a separate Section K document for each assistant municipal valuer reflected on the resource plan	1. Affidavit by all Assistant Municipal Valuers signed by a Commissioner of Oaths. 2. Detailed CV with relevant and proven property valuation knowledge and experience as municipal Valuer performing mass valuations. 3. Certified copy of South African Council for the Property Valuers Profession registration certificate. 4. References contacted and verified with proven experience as claimed in the CV.
SECTION L	GIS and Data Manager	1. More than 3 years' experience in GIS and data management. 2. Detailed CV submitted with relevant experience. 3. Affidavit by the nominated GIS and Data Manager signed by a Commissioner of Oaths. 4. References contacted and verified with proven experience as claimed in the CV.

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS	CRITERIA TO BE VERIFIED
SECTION M	Project Manager	1. more than 3 years' experience in project management. 2. Detailed CV submitted with relevant experience. 3. Affidavit by the nominated Project Manager signed by a Commissioner of Oaths. 4. References contacted and verified with proven experience as claimed in the CV..
SECTION N	Pricing Schedule (Table 1) and Project Work Programme (Table 2)	Table 1 and Table 2 submitted and completed fully with pricing, milestones (time frames) and deliverables aligned to the bid project work programme.

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS	CRITERIA TO BE VERIFIED
SECTION O	Certification and declaration that the Bidder has – (1) an authorised and licenced, functional and operational "valuation roll management system" (VRMS) in terms of the bid specifications and (2) VRMS Functional Specification document (3) Demonstrated and proven functionality and operation of the VRMS (4) Necessary computer hardware, software, and technology systems to perform and deliver the bid scope of work; subject to presentation and demonstration on request by the municipality.	1. Certification and declaration in terms of section "O" submitted in the bid with necessary authority and licence to use the "valuation roll management system" for this bid and its duration. 2. VRMS Functional Specification document 3. Demonstrated and proven functionality and operation of the Valuation Roll Management System (VRMS) in terms of the Bid Specification and proven ability to provide the specified and adopted MPRA Data Templates A= Valuation Roll, B= Roll GIS Layer (shape file), C= Property attribute data and D= Sales Data File with the SG coding system 21 and 26 digits and tenure types captured accurately – a sample of each Template to be provided as evidence. 4. Necessary computer hardware, software and information technology systems demonstrated.
SECTION P	Declaration of interest	Conflict of interest.
SECTION Q	Original tax clearance certificate stamped and dated by SARS.	Valid/current original tax Clearance Certificate submitted

SECTION REFERENCE	COMPULSORY HUMAN RESOURCES, SYSTEMS, DATA AND DOCUMENTS	CRITERIA TO BE VERIFIED
SECTION R	Preferential procurement regulations 2022 - Specific goals for the bid and points claimed	Section R form completed for preference points claimed for specific goals of the bid
SECTION S	Declaration of Bidder's past supply chain management practices.	Compliant with supply chain management practices by reference.
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)

I confirm that I am the sole owner of the business trading as_____.

NAME	**NAME OF BIDDER**
SIGNATURE	**DATE**
WITNESSES 1	**WITNESSES 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**
WITNESSES 1	**WITNESSES 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**
WITNESSES 1	**WITNESSES 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 OF PARTNER 1	**NAME OF BIDDER**
SIGNATURE	**DATE**
WITNESSES 1	**WITNESSES 2**
NAME OF PARTNER 2	**NAME OF BIDDER**
SIGNATURE	**DATE**
WITNESSES 1	**WITNESSES 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-OPERATIVE

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**
WITNESSES 1	**WITNESSES 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**
WITNESSES 1	**WITNESSES 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**
WITNESSES 1	**WITNESSES 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 as a professional Valuer or professional associated Valuer (with no restrictions) must be attached to the Bid.

(3) A detailed CV to be provided by the nominated Municipal Valuer which demonstrates relevant valuation and valuation roll experience of more than 5 years in performing the municipal Valuers function as contemplated in section 34 of the MPRA.

(4) A schedule of contactable references and phone numbers to be provided of current or previous general valuation contracts that you have performed the function of municipal Valuer.

Name	Municipality / Designation	Contact number

(5) In terms of section 43 of the MPRA, a Municipal Valuer must disclose any personal or private business interests in property in a municipality and 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 therefore declare any personal or private business interests in any property in the municipality in terms of section 43(1) (a).

2. PERSONAL DETAILS

Full names .....

I.D. number .....

Professional qualifications .....

Professional registration No. .....

Years of experience in municipal valuation .....

3. **WORK EXPERIENCE: MUNICIPAL MASS 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 .....

Number of appeals upheld .....

Number of appeals dismissed .....

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) 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 Umuziwabantu Local Municipality from the date of appointment and for the period of designation and will abide by professional ethics and the 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**
WITNESSES 1	**WITNESSES 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) A detailed CV to be provided by the nominated Assistant Municipal Valuer;

(4) A schedule of contactable references and phone numbers to be provided of current or previous general valuation contracts that you have performed valuation and related work;

Name	Municipality / Designation	Contact number

(5) In terms of section 43 of the MPRA, an assistant municipal Valuer must disclose any personal or private business interests in property in a municipality and 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 therefore declare any personal or private business interests in any property in the municipality in terms of section 43(1) (a).

2. **PERSONAL DETAILS**

Full names .....

I.D. number .....

Professional qualifications .....

Professional registration No. .....

Years of experience in municipal valuation .....

3. **WORK EXPERIENCE: MUNICIPAL MASS 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 .....

Number of appeals upheld .....

Number of appeals dismissed .....

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) 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 assistant municipal valuer for the Umuziwabantu Local Municipality from the date of delegation and designation by the Municipal Valuer and for the period of designation 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 ASSISTANT MUNICIPAL VALUER	**NAME OF BIDDER**
SIGNATURE ASSISTANT MUNICIPAL VALUER	**DATE**
WITNESSES 1	**WITNESSES 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**

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

(2) A detailed CV to be provided by the nominated GIS and Data Manager;

(3) A schedule of contactable references and phone numbers to be provided of current or previous general valuation contracts that you have performed valuation and related work;

Name	Municipality / Designation	Contact number

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) 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 GIS and Data Manager for the Umuziwabantu Local Municipality for the period of the contract 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 at _____ this _____day of _____ 20_____.

NAME GIS AND DATA MANAGER	**NAME OF BIDDER**
SIGNATURE GIS AND DATA MANAGER	**DATE**
WITNESSES 1	**WITNESSES 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 meat _____ 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.

(3) A detailed CV to be provided by the nominated Project Manager with a good understanding of managing general valuations and a good knowledge of the MPRA implementation;

(4) A schedule of contactable references and phone numbers to be provided of current or previous general valuation contracts that you have performed valuation and related work;

Name	Municipality / Designation	Contact number

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) 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 Project Manager for the Umuziwabantu Local Municipality for the period and duration of the contract and will abide by professional ethics.

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

NAME PROJECT MANAGER	**NAME OF BIDDER**
SIGNATURE PROJECT MANAGER	**DATE**
WITNESSES 1	**WITNESSES 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_____

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 complete the Pricing Schedule **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"** and **Annexure "D"** of the Bid Specification document regarding data, information and document management with specific reference to the structure, format and content and the provision of data extracts.

2. The Bidder must complete the priced Project Work Programme with realistic time frames as shown in **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 Programme and cash flow will be managed with reference to table 2 section N, and finalised with the Bidder if the Bidder is appointed as Service Provider.

4. A property count based on the current valuation roll has been included for pricing divided into their categories of property identified (or if available the property use) in the last valuation roll. The new valuation roll when prepared will need to be aligned to the adopted rates policy and category of properties of the municipality and the service provider must familiarise itself with the rates policy and categories of property adopted by the municipality**. As part of the project methodology submission referred to in the Bid Evaluation Criteria Annexure "L", bidders must stipulate their valuation methodology used to inform their pricing of section "N" items where ANNEXURE "J" - VALUATION AND RATING OF COMMUNAL PROPERTY, has reference.**

5. The Bid requires that the designated Municipal Valuer carry out the functions of the Municipal Valuer in terms of the MPRA and specifically section 34 of the MPRA.

6. The Municipality shall retain an amount equal to 10% of the General Valuation payments to be made to the Bidder. Such retention shall be paid over to the successful service provider within 60 days of the completion of all objections by the municipal valuer and the close out report for the General Valuation in terms of the Bid. No retention applies to valuation appeals or supplementary valuation rolls in terms of this bid.

7. The Municipality does not bind itself to accept the lowest or any bid and reserves the right to accept a bid in whole or any part. The municipality further reserves the right not to award this bid.

8. Bidders must be fully acquainted with and implement all legislative amendments, policies, guidelines and standards impacting on the MPRA in support of this bid. No additional fees will be payable relating to these amendments during the contact award period.

TABLE 1: PRICING SCHEDULE PER ITEM AND QUANTITY

	PART A: SCHEDULE OF PER FIXED AMOUNTS: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
1	**Project Management Function**				
1.1	Project Management Function	Fixed cost item	1		
2	**Project Office & Project Establishment**				
2.1	Draft & Finalise Project Contract; project program and project cash flow plan aligned to the Bid and Section N	Fixed cost item	1		
2.2	Finalise 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) read with clause 10 of the bid specification and Section "O" of the Bid. Includes all data extracts / exports.**				
3.1	Valuation Roll Management System installed and tested - confirmed licenced, available, functional and usable with certification and demonstration completed. Includes all data extracts / exports required at least monthly.	Fixed Cost	1		
4.A	**Aerial Photography (refer to specifications)**				
4A.1	Acquire aerial photography/imagery for the Town (urban) areas only (0.25 resolution)	Fixed cost item	1		
4A.2	Acquire aerial photography/imagery for the balance being Rural/Farm areas only (0.25 resolution)	Fixed cost item	1		
4.B	**Property Register creation, data support and delivery of components**				

	PART A: SCHEDULE OF PER FIXED AMOUNTS: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
4B.1	Identify data sources	Fixed cost item	1		
4B.2	Acquire, clean and prepare data (in addition to 4B.3 and 4B.4 below)	Fixed cost item	1		
4B.3	Deeds office data (ownership and sales data) extracts as per bid document and integration to VRMS	Fixed cost item	1		
4B.4	Prepare and create Property Register which shall comprise an electronic data base of all properties in terms of the bid specifications and best practice	Fixed cost item	1		
4B.5	Prepare and create a Valuation Roll GIS cadastral layer in ESRI shape file format aligned to the property register database as per bid document specifications	Fixed cost item	1		
4B.6	Undertake a record match between the new property register database (valuation roll) records and the valuation roll GIS cadastral layer and produce an exception report with corrective action plan.	Fixed cost item	1		
4B.7	Undertake a record match between the new property register database (valuation roll) records and the rates financial system records and identify mismatches in a report.	Fixed cost item	1		
4B.8	Prepare and create a digitised GIS building footprint (layer) in ESRI shape file format for each building valued using the specified aerial photography. This will not be required where Non-CAMA methodology (individual valuation per property) is applied and where a building is inspected and measured on site with a sketch provided per building.	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 Report & Valuation Methodology Report (to be read with annexure D) : 1) Initial market report and (2) final market report	Fixed cost item	1		
5.2	Non-Residential (includes agricultural PSI and special property types) Contract Sales Review/Market Report/ Costs reports & Valuation Methodology Reports (to be read with annexure D): 1) Initial market report and (2) final market report	Fixed cost item	1		

	PART A: SCHEDULE OF PER FIXED AMOUNTS: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
5.3	Data Collection, Data Capture and Digitised Building Footprint methodology, quality assurance plans and training manuals.	Fixed cost item	1		
5.4	General Valuation Roll (GV) close out report **(Annexure E)**	Fixed cost item	1		
5.5	**General valuation roll objections / appeals processing**: by the municipal valuer in terms of the MPRA as envisaged by Sections 50, 51, 52, 53 and 69 and the bid specifications.	NA	NA	To include in price per property	To include in price per property
5.6	General Valuation Objection processing close out report: including count, value changes and GIS spatial layer update (including Year 1) **Annexure F**	Fixed cost item	1		
5.7	General Valuation Appeals processing (only attendance at appeal boards can be claimed as quoted under Part D of the schedule).	NA	NA	To include in price per property	To include in price per property
5.8	General Valuation Appeal close out report: including count, value changes and GIS spatial layer update (including Year 1) **Annexure G**	Fixed cost item	1		
5.9	Collection and upload of photographs (JPEG format and 2 photos per building). To be priced on a rate per property. Municipality to confirm if required)	NA	NA		
	A - Sub-Total (1.1 to 5.9)		**Na**		

3

	PART B: SCHEDULE OF PROPERTY PER ENTRY RATES: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
6	**Category of Property (COP) / Property Use (PU) descriptions for valuation rolls (Read with applicable specifications - Annexure "A" and "D" of the Bid documents)**				
	Farms/Agricultural/Rural Communal/PSI/Vacant Land (6.1 to 6.7)				
6.1	Agricultural property [COP s8 MPRA]	Count	**390**		
6.2	Rural communal property	Count	**23**		
6.3	Public Service Infrastructure Properties (PSI) – Grouped [COP s8 MPRA]	Count	**39**		

	PART B: SCHEDULE OF PROPERTY PER ENTRY RATES: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
6	**Category of Property (COP) / Property Use (PU) descriptions for valuation rolls (Read with applicable specifications - Annexure "A" and "D" of the Bid documents)**				
6.4	Vacant Land	Count	**100**		
6.5	State Trust Land (STL)	Count	**0**		
6.6	Government Owned property – listed under Farms	Count	**0**		
6.7	Collection of Postal Addresses (Farm/Agricultural/PSI/Rural communal residential) schedule from municipality	Count	**0**		
	Sub-Total (6.1 to 6.7)		**552**		
	Residential (6.8 to 6.15)				
6.8	Residential Property [COP s8 MPRA]	Count	**2651**		
6.9	Sectional Title Residential (number of units)	Count	**5**		
6.10	Low Income Housing	Count	**0**		
6.11	Vacant Residential Land	Count	**0**		
6.12	Communal property	Count	**23**		
6.13	Registered rights to extend (sectional title)	Count	**0**		
6.14	Registered exclusive use areas (sectional title)	Count	**0**		
6.15	Collection of Postal Addresses residential	Count	**0**		
	Sub-Total (6.8 to 6.15)		**2679**		
	Non Residential (6.16 to 6.21)				
6.16	Business & Commercial Property [COP s8 MPRA]	Count	**84**		
6.17	Industrial Property [COP s8 MPRA]	Count	**32**		
6.18	Sectional Title – Business / Industrial	Count	**0**		
6.19	Vacant Commercial / Industrial	Count	**0**		
6.20	Municipal owned property	Count	**86**		
6.21	Collection of Postal Addresses (Non residential)	Count	**0**		
	Sub-Total (6.16 to 6.21)		**202**		

	PART B: SCHEDULE OF PROPERTY PER ENTRY RATES: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
6	**Category of Property (COP) / Property Use (PU) descriptions for valuation rolls (Read with applicable specifications - Annexure "A" and "D" of the Bid documents)**				
	Specialized Properties (6.22 to 6.61)				
6.22	Abattoirs	Count	**0**		
6.23	Airports/airfields	Count	**0**		
6.24	Casinos	Count	**0**		
6.25	Civic Centre/ Community Halls	Count	**0**		
6.26	Clinics	Count	**0**		
6.27	Creches	Count	**1**		
6.28	Golf Courses and Golf estates	Count	**0**		
6.29	Grain Co-ops	Count	**0**		
6.30	Grain Depots	Count	**0**		
6.31	Heavy Manufacturing/Engineering	Count	**0**		
6.32a	Public Service Purpose – (used by organ of state)	Count	**76**		
6.32b	Hospitals (Private)	Count	**0**		
6.33	Hotel, Resort & Conference Centre	Count	**1**		
6.34	Courts of Law (COP Public Service Purpose – used by organ of state)	Count	**0**		
6.35	Libraries	Count	**0**		
6.36	Military Bases	Count	**0**		
6.37	Mining Property [COP s8 MPRA]	Count	**1**		
6.37.1	National and provincial libraries and archives (COP Public Service Purpose – used by organ of state)	Count	**0**		
6.38	Old Age / Retirement Homes	Count	**2**		
6.39	Petrol Filling Stations	Count	**2**		
6.40	Places of Worship	Count	**18**		
6.41	Police Stations (COP Public Service Purpose – used by organ of state)	Count	**3**		

	PART B: SCHEDULE OF PROPERTY PER ENTRY RATES: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
6	**Category of Property (COP) / Property Use (PU) descriptions for valuation rolls (Read with applicable specifications - Annexure "A" and "D" of the Bid documents)**				
6.42	Post Offices	Count	**1**		
6.43	Power Stations & Substations	Count	**1**		
6.44	Correctional facilities / Prison (COP Public Service Purpose: used by organ of state)	Count	**0**		
6.45	Quarry	Count	**0**		
6.46	Racetrack	Count	**0**		
6.47a	School (COP Public Service Purpose – used by organ of state)	Count	**63**		
6.47b	School (Private)	Count	**2**		
6.48	Shopping Centre	Count	**0**		
6.49	Sports Facilities including Stadiums	Count	**1**		
6.50	Specialised Non-Market Properties	Count	**0**		
6.51	Vacant Other Land	Count	**0**		
6.52	Land Tenure Right (Section 1 of Upgrading of Land Tenure Rights Act, 1991 (Act No. 112 of 1991)	Count	**0**		
6.53	Protected areas	Count	**0**		
6.54	Properties used for Eco Tourism	Count	**0**		
6.55	Properties on which National Monuments are Proclaimed	Count	**0**		
6.56	Boarding House	Count	**0**		
6.57	Registered rights to extend (sectional title)	Count	**0**		
6.58	Registered exclusive use areas (sectional title)	Count	**0**		
6.59	Public Benefit Organisation Property [COP s8 MPRA]	Count	**5**		
6.60	Special Purposes property	Count	**0**		
6.61	Collection of Postal Addresses (Special)	Count	**0**		
	Sub-Total (6.22 to 6.61)		**177**		

	PART B: SCHEDULE OF PROPERTY PER ENTRY RATES: GENERAL VALUATION BID				
No	**Description**	**Unit**	**Quantity**	**Bid Rate incl VAT**	**Bid Amount (R) incl VAT**
6	**Category of Property (COP) / Property Use (PU) descriptions for valuation rolls (Read with applicable specifications - Annexure "A" and "D" of the Bid documents)**				
6	**Other property not specified above (6.62 to 6.72) – municipality to specify as required**				
6.62	Private Cemetery	Count	**1**		
6.63	Full Title Sectional Title Parent record (Nil Value)	Count	**0**		
6.64	Full Title Registered Property (For MP and LTR – Nil Value)	Count	**0**		
6.65		Count	**0**		
6.66		Count	**0**		
6.67		Count	**0**		
6.68		Count	**0**		
6.69		Count	**0**		
6.70		Count	**0**		
6.71		Count	**0**		
6.72	Collection of Postal Addresses	Count	**0**		
	Sub-Total (6.62 to 6.72)		**1**		
	B – Sub Total (6.1 to 6.72)		**0**		
I	**GRAND TOTAL (A + B) (1.1 to 6.72)**		**3 611**		

	PART C: VALUATION ROLL MAINTENANCE BID				
Item	**Description**	**Unit**	**Quantity**	**Comment**	**Bid Amount (R) (incl VAT)**
7	**Updating of valuation rolls:** Perform the functions of the municipal valuer, preparation of supplementary valuations and preparation of an annual supplementary valuation roll in terms of the MPRA and Bid specifications with the Annexure "H" report. (table 1 cross ref item 7)				
7.1	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78, 79 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(First Financial Year after GV effective date)**	Annual fee (Year 1)	1		
7.1.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(First Financial Year after GV effective date)**	Annual fee (Year 1)	1		
7.1.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(First Financial Year after GV effective date). Annexure H**	Report Annual fee (Year 1)	1		
7.1.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79	Annual fee (Year 1)	1		
7.2	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78, 79 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Second Financial Year after GV effective date)**	Annual fee (Year 2)	1		
7.2.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Second Financial Year after GV effective date)**	Annual fee (Year 2)	1		

	PART C: VALUATION ROLL MAINTENANCE BID				
Item	**Description**	**Unit**	**Quantity**	**Comment**	**Bid Amount (R) (incl VAT)**
7.2.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Second Financial Year** after GV effective date) **Annexure H**	Report Annual fee (Year 2)	1		
7.2.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79	Annual fee (Year 2)	1		
7.3	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78, 79 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Third Financial Year after GV effective date)**	Annual fee (Year 3)	1		
7.3.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Third Financial Year after GV effective date)**	Annual fee (Year 3)	1		
7.3.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Third Financial Year** after GV effective date) **Annexure H**	Report Annual fee (Year 3)	1		
7.3.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79	Annual fee (Year 3)	1		
7.4	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78, 79 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Fourth Financial Year after GV effective date)**	Annual fee (Year 4)	1		

	PART C: VALUATION ROLL MAINTENANCE BID				
Item	**Description**	**Unit**	**Quantity**	**Comment**	**Bid Amount (R) (incl VAT)**
7.4.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Fourth Financial Year after GV effective date)**	Annual fee (Year 4)	1		
7.4.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Fourth Financial Year** after GV effective date) **Annexure H**	Report Annual fee (Year 4)	1		
7.4.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79	Annual fee (Year 4)	1		
7.5	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78, 79 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Fifth Financial Year after GV effective date)**	Annual fee (Year 5)	1		
7.5.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Fifth Financial Year after GV effective date)**	Annual fee (Year 5)	1		
7.5.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Fifth Financial Year** after GV effective date) **Annexure H**	Report Annual fee (Year 5)	1		
7.5.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79	Annual fee (Year 5)	1		
	Sub Total (7.1 to 7.5.3)				

	PART C: VALUATION ROLL MAINTENANCE BID				
Item	**Description**	**Unit**	**Quantity**	**Comment**	**Bid Amount (R) (incl VAT)**
8	**Valuation roll management system (VRMS) (Available, licenced and functional as per bid and bid specifications). Includes all data extracts / exports required at least monthly.**				
8.1	VRMS Licence SLA Year 1 (first Financial Year after GV effective date)	Annual fee	1		
8.2	VRMS Licence SLA Year 2 (second Financial Year after GV effective date)	Annual fee	1		
8.3	VRMS Licence SLA Year 3 (third Financial year after GV effective date)	Annual fee	1		
8.4	VRMS Licence SLA Year 4 (fourth Financial Year after GV effective date)	Annual fee	1		
8.5	VRMS Licence SLA Year 5 (fifth Financial Year after GV effective date)	Annual fee	1		
	Sub Total (8.1 to 8.5)				
II	**GRAND TOTAL (C) (7.1 to 7.5.2 plus 8.1 to 8.5)**				
I + II	**GRAND TOTAL COST OF BID (A + B + C)**				

	PART D: SCHEDULE OF RATES: GENERAL VALUATION BID (NOT PART OF BID PRICE) Must be priced for bid validity				
Item	**Description**	**Unit**	**Quantity**	**Comments**	**Bid Amount incl VAT**
9	**Attendance at appeal board meetings by the municipal valuer or by the representative assistant municipal valuer (by delegation) for appeal hearings and objection reviews. Based on actual attendance and evidence of the official approved attendance register of the appeal board.**				
9.1	Attendance at Appeal Board meetings by the Municipal Valuer	Per Appeal	1		
9.2	Attendance at Appeal Board meetings by the delegated assistant municipal valuer	Per Appeal	1		
9.3	Vehicle travel to attend appeal board hearings and meetings	Per Km	1		

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

Task ID	Part A, B and C : Deliverables and work program	Time frames From	Times frames To	Price (Incl VAT)
1	**Project Management Function**			
2	**Project Office & Project Establishment**			
3	**Valuation Roll Management System (VRMS) – GV**			
4A	**Acquire aerial photography/imagery**			
4B	**Property Register creation, data support and delivery of components**			
5	**Property Sales Review; Market and Valuation Methodology Reports (All property)**			
6	**RESIDENTIAL Data collection / capture and quality assurance**			
7	**RESIDENTIAL Valuations**			
8a	**NON RESIDENTIAL Data collection / capture and quality assurance**			
8b	**SPECIALISED PROPERTY Data collection / capture and quality assurance**			
9a	**NON RESIDENTIAL Valuations**			
9b	**SPECIALISED PROPERTY Valuations**			
10a	**Valuation Roll (GV) certification and delivery**			
10b	**Valuation Roll (GV) close out report (Annex E)**			
11	**General Valuation Objections / Appeals processing and management (Annex F / G)**			
12	**Updating of valuation rolls (Annual Fee)**			
12.1	Municipal Valuer function / 12.1.1 GIS roll cadastral / 12.1.2 Evidence and Close out Annex H			
12.2	Municipal Valuer function / 12.2.1 GIS roll cadastral / 12.2.2 Evidence and Close out Annex H			
12.3	Municipal Valuer function / 12.3.1 GIS roll cadastral / 12.3.2 Evidence and Close out Annex H			
12.4	Municipal Valuer function / 12.4.1 GIS roll cadastral / 12.4.2 Evidence and Close out Annex H			
12.5	Municipal Valuer function / 12.5.1 GIS roll cadastral / 12.5.2 Evidence and Close out Annex H			
13	**Valuation roll management system (VRMS) licensing – post GV for five (5) years**			
I + II	**GRAND TOTAL COST OF BID (A + B + C) must equate to table 1 bid cost**			

SECTION O
DECLARATION OF COMPUTER EQUIPMENT, SOFTWARE AND INFORMATION TECHNOLOGY SYSTEMS

1. The Bidder hereby certifies and declares that the Bidder has (1) an authorised and licenced, functional and operational "valuation roll management system" (VRMS) in terms of the bid specifications and (2) the necessary computer hardware, software and technology systems to perform and deliver the bid scope of work for the duration of the bid for the Umuziwabantu Local Municipality for Implementation 1 July 2028 and valuation roll maintenance for the period 1 July 2028 to 30 June 2033. The bidder must submit the authority and licence to use the VRMS and the VRMS functional specification document with the bid and may also be requested to **present and demonstrate** the valuation roll management system on request by the municipality.

2. The Bidder accepts that the Umuziwabantu Local Municipality will not, except for the valuation roll management system (under Section "N" pricing), compensate the Bidder for any other systems, systems training, computer hardware, software and technology systems during the period of the contract which are necessary to undertake the general valuation for the Umuziwabantu Local Municipality for Implementation 1 July 2028 and valuation roll maintenance for 1 July 2028 to 30 June 2033.

NAME OF DECLARANT	**NAME OF BIDDER**
SIGNATURE OF DECLARANT	**DATE**
WITNESSES 1	**WITNESSES 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_____

TO BE STAMPED BY JUSTICE OF PEACE OR COMMISSIONER OF OATHS

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SECTION P
DECLARATION OF INTEREST

1. Any legal person, including persons employed by the Umuziwabantu Local Municipality, or persons who act on behalf of the Umuziwabantu Local Municipality or persons having a kinship with persons employed by the Umuziwabantu Local 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 Umuziwabantu Local Municipality, or to persons who act on behalf of the Umuziwabantu Local 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 Umuziwabantu Local Municipality or acts on behalf of the Umuziwabantu Local 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 Umuziwabantu Local 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 Umuziwabantu Local 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 Umuziwabantu Local 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. The **ORIGINAL TAX CLEARANCE CERTIFICATE** must be submitted together with the bid stamped and dated by SARS. 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.

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

SECTION R

PREFERENCE POINTS CLAIMED - PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

---

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(*delete whichever is not applicable for this tender*).

a) The applicable preference point system for this tender is the 90/10 preference point system.

b) The applicable preference point system for this tender is the 80/20 preference point system.

c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

(a) Price; and

(b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	
SPECIFIC GOALS	
Total points for Price and SPECIFIC GOALS	**100**

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

(c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20 or 90/10

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \text{ or } \qquad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20 or 90/10

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \qquad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

***Note to tenderers: The tenderer must indicate how they claim points for each preference point system.*)**

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Points		80		
Companies Located within KZN		15		
Companies Located within KZN		5		

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Nameof company/firm…….

4.4. Company registration number: ……...

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:-

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as

shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

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

SECTION S
BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. **Section S must be completed by the 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.treasury.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 Umuziwabantu Local Municipality, if requested to do so.

2. If the information supplied in this document is found to be incorrect or false, the Umuziwabantu Local 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 Umuziwabantu Local Municipality as a result of the award of the contract, and

   (b) cancel the contract and claim any damages which the Umuziwabantu Local 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**
WITNESSES 1	**WITNESSES 2**

SECTION U
CONTACT DETAILS OF BIDDER

1	FULL NAMES	
2	REGISTRATION NO. OR I.D NO.	
3	POSTAL ADDRESS	
4	TELEPHONE NO.	
5	FAX NO.	
6	E-MAIL ADDRESS	
7	CONTACT PERSON	
8	CELL NO. OF CONTACT PERSON	
9	PHYSICAL ADDRESS	

C – BID SPECIFICATION DOCUMENT

UMUZIWABANTU MUNICIPALITY

BID
SPECIFICATION DOCUMENTATION

BID NUMBER: UMUZ/13/2026

GENERAL VALUATION AND PREPARATION OF A VALUATION ROLL FOR IMPLEMENTATION 1 JULY 2028 AND PREPARATION AND UPDATING OF THE VALUATION ROLL FOR THE PERIOD 1 JULY 2028 TO 30 JUNE 2033

NAME OF BIDDER ……..…

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1. DEFINITIONS

The definitions listed below are intended to support the bid specification document and are not meant to be exhaustive. Therefore, generally recognised definitions such as those of the International Association of Assessing Officers (IAAO) Technical Standards, those of the International Valuation Standards (IVS) and those that are endorsed by the South African Council for the Property Valuers Profession (SACPVP) are applicable in the context of this bid.

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 of valuing property that, incorporates computer-supported statistical analyses, such as multiple regression analysis and adaptive estimation procedure, to assist the 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 roll, upon which a "rate" is levied.

Data extraction—is the act or process of retrieving data for further data processing or data storage (data migration). The output is the Data Extract.

Data Management—(1) the human, computer and technological procedures employed to ensure that no information is lost through negligent handling of records from a file, that all information is properly supplemented and up-to-date, and that all information is easily accessible. (2) Data management refers to the development, execution and supervision of plans, policies, programs and practices that control, protect, deliver and enhance the value of data and information assets.

Final Delivery Certificate (General Valuation)—means the document issued by the Municipality confirming that the valuation roll has been submitted and certified by the municipal valuer, all known errors and defects have been rectified and that the services and valuations have been rendered in compliance with the Act together with all other terms and conditions of the bid, and after submission of all General Valuation data, documents and information with the close out reports Annexure E and F of the bid documents.

General Valuation (GV) contract—means the complete contract obligations and deliverables for the valuation roll and all associated activities relating to the support and updating of rolls in terms of the MPRA.

Geographical Information Systems (GIS)—(1) a system designed to capture, store, retrieve, manipulate, analyse, manage, and present all types of spatial or geographical data. (2) a computerised mapping system capable of integrating spatial data (land information) and attribute data among different layers on a base map.

Market Value— is the amount the property would have realised if sold on the date of valuation in the open market by a willing seller to a willing buyer subject to legislation. (Reference s46 of the MPRA).

Model Calibration—The development of adjustments, or coefficients, based on market analysis, that identifies specific factors with an actual effect on market value.

Model Specification—The formal development of a model in a statement or equation, based on data analysis and appraisal theory.

MPRA— means the Local Government: Municipal Property Rates Act, 2004 (Act No. 6 of 2004) as amended.

Multiple Regression, Multiple Regression Analysis (MRA)—A particular statistical technique, similar to correlation, used to analyse data in order to predict the value of one variable (the dependent variable), such as market value, from the known values of other variables (called independent variables), such as lot size, number of rooms, and so on.

Neighbourhood (Also known as Market Area / Homogeneous Area)—(1) The environment of a subject property that has a direct and immediate effect on value. (2) A geographic area defined for some useful purpose, such as to ensure for later multiple regression modelling that the properties are relatively homogeneous and share important locational characteristics.

Practices, methods and standards – means the practices, methods and standards applicable to municipal valuations for property rating, taking account of standards and the specifications in these bid documents.

Property— means a property defined under the definition of property and rateable apportionments recognised under section 9 in terms the MPRA and includes land and buildings.

Property Data— means all data related to and associated with a property record of a valuation roll, the valuation of a property and the determination of the value of a property and includes data collection field sheets, templates, calculations, spreadsheets, sketches, digitised building footprints, photographs, files, maps, manuals, market reports, GIS cadastral information (ESRI source), digital aerial photography and all other data, documents and information as contemplated in terms of section 85 of the MPRA and prepared and produced in terms of this bid and the MPRA.

Property Register —means a consolidated valuation roll which comprises (with reference to Section 23 Part "A" of the "register of properties") the valuation roll, with all properties required to be listed under Section 30 (3), and encompassing;

(i) supplementary valuations and roll updates in terms of sections 78 and 79 of the MPRA;
(ii) objection and appeal decision roll adjustments;
(iii) the corresponding valuation roll and property valuation database of all property data residing on the valuation roll management system and;
(iv) the corresponding Valuation Roll GIS cadastral layer,

ALL of which must be aligned to the ''definition of property'' namely (a) registered deeds office records (full title and sectional title), (b) registered rights against immoveable property, (c) land tenure rights, (d) public service infrastructure (PSI) records and all other rateable property by way of apportionment in terms of section 9 of the MPRA.

Proxy Sale—means an independent control valuation is determined and used as substitute for a sale to support the application of computer assisted mass appraisal techniques where insufficient market sales evidence is available in a homogenous area.

Service Provider— means the lead or primary consultant responsible for the delivery of the contract and includes employees, agents and sub-consultants.

Valuation Roll (consolidated)—Means a valuation roll prepared for a General valuation and then updated and comprises all records of the valuation roll, the supplementary valuation roll adjustments and any objection and appeal decision adjustments of the valuer and the appeal board. Termed a “consolidated” valuation roll and typically required and used for ongoing reconciliation of rating and for annual municipal budgeting.

Valuation Roll GIS cadastral layer—Is the spatial GIS cadastral representation of MPRA defined property listed on the valuation roll (Property register – Part A), however excludes sectional title units and property which are unreasonably difficult to create and display spatially on the GIS.

Valuation Roll Management System (VRMS)—is software which supports the production of the property register, the production of valuation rolls, the management of data such as property, valuation and sales, and provides a solution for the valuation of property and the preparation and updating of valuation rolls.

2. PROJECT OBJECTIVE

(1) The objectives of the project is to appoint a Service Provider to perform the functions of a municipal valuer in terms of the MPRA which includes the following –

(a) create a property register;

(b) undertake a general valuation and prepare a valuation roll of all rateable properties;

(c) capture / upload all necessary data to a valuation roll management system (VRMS);

(d) assist with the resolution of objections by review;

(e) assist with the resolution of appeals;

(f) undertake valuation roll maintenance and prepare supplementary valuation rolls;

(g) provide systems and reporting to support the valuation roll and;

(h) prepare and submit reports to the municipality on the valuation roll.

(2). The successful service provider must take account of legislation and all amendments including regulations and implement the amendments in consultation with the municipality. The municipality therefore reserves the right to review the contractual obligations of the successful service provider to ensure compliance with legislative amendments.

For information the MPRA has been amended since its promulgation as follows –

- No. 6 of 2004: Local Government: Municipal Property Rates Act, 2004 on 17 May 2004.
- No. 19 of 2008: Local Government Laws Amendment Act, 2008 on 13 October 2008.
- No. 19 of 2009: Local Government: Municipal Property Rates Amendment Act, 2009 on 26 November 2009.
- No. 29 of 2014: Local Government: Municipal Property Rates Amendment Act, 2014 on 18 August 2014.
- No. 77 of 2014: Local Government: Municipal Property Rates Amendment Act, 2014 on 28 November 2014.

3. PROJECT DELIVERABLES AND WORK PROGRAM

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

PROJECT WORK PROGRAM

Task ID	Part A, B and C : 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 & Finalise Project Contract (MOA), project program and project cash flow plan
2.2	Finalise 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	Provision of functional and operational Valuation Roll Management System: Certification and operation demonstrated. Includes all data extracts / exports required at least monthly. • VRMS installed and operational • VRMS Valuation of property • VRMS data import and export facility • VRMS create, read and search, update and delete functionality for roll data • VRMS reporting facility • Ability to capture and store Deeds Office data • Ability to store history of data with audit trails • Integration VRMS with GIS • Manage objections and appeals processing as per MPRA • Demonstrated security of data for the roll • Ability to produce valuation rolls and supplementary rolls • Ability to generate and print section 49 of MPRA as well as Valuation Certificates and other municipal valuer notices in terms of the MPRA
3.2	Integration of Valuation Roll Management System with Rates financial management system
3.3	VRMS Service Level Agreement
3.4	Hard Copy & Electronic Data Storage, Back-Up and Retrieval Plan
3.5	Hard Copy & Electronic Data Storage, Back-Up and Retrieval
4.A	**Aerial Photography (refer to specifications)**
4A.1	Acquire aerial photography/imagery for the Town (urban) areas only (0.25 resolution)
4A.2	Acquire aerial photography/imagery for the balance being Rural/Farm areas only (0.25 resolution)
4.B	**Property Register preparation for the general valuation**
4B.1	Identify data sources
4B.2	Acquire, clean and prepare data (in addition to 4.3 and 4.4 below)

Task ID	Part A, B and C : Deliverables and work program
4B.3	Deeds office data (ownership and sales data) extracts as per bid document and integration to VRMS
4B.4	Prepare and create Property Register which shall comprise an electronic data base of all properties in terms of the bid specifications and best practice
4B.5	Prepare and create a Valuation Roll GIS cadastral layer in ESRI shape file format aligned to the property register database as per bid document specifications
4B.6	Undertake a record match between the new property register database (valuation roll) records and the valuation roll GIS cadastral layer and produce an exception report with corrective action plan.
4B.7	Undertake a record match between the new property register database (valuation roll) records and the rates financial system records and identify mismatches in a report.
4B.8	Prepare and create a digitised building footprint plan (layer) in ESRI shape file format for each building valued using the specified aerial photography. This will not be required where Non-CAMA methodology (individual valuation per property) is applied and where a building is inspected and measured on site with a sketch provided per building.
5	**Project Sales Review; Market and Valuation Methodology Reports**
5.1	Residential Contract Sales Review/Market Report & Valuation Methodology Report (to be read with annexure D) : 1) Initial market report and (2) final market report and to include • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Data collection sales review forms per property • Provide data extracts in terms of applicable standards and the bid specifications
5.2	Non-Residential (includes agricultural PSI and special property types) Contract Sales Review/Market Report/ Costs reports & Valuation Methodology Reports (to be read with annexure D): 1) Initial market report and (2) final market report and must include • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Building cost report for specialised properties • Data collection sales review forms per property • Provide data extracts in terms of applicable standards and the bid specifications • Valuation templates
5.3	Data Collection, Data Capture and Digitised Building Footprint methodology, quality assurance plans and training manuals.
5.4	General Valuation Roll (GV) close out report **(Annexure E)**
5.5	**General valuation roll objections / appeals processing**: by the municipal valuer in terms of the MPRA as envisaged by Sections 50, 51, 52, 53 and 69 and the bid specifications.
5.6	General Valuation Objection processing close out report: including count, value changes and GIS spatial layer update (including Year 1) **Annexure F**
5.7	General Valuation Appeals processing (only attendance at appeal boards can be claimed as quoted under Part D of the schedule).
5.8	General Valuation Appeal close out report: including count, value changes and GIS spatial layer update (including Year 1) **Annexure G**
5.9	Collection and upload of photographs (JPEG format and 2 photos per building). To be priced on a rate per property.
6	**Data collection RESIDENTIAL** (table 1 cross ref to No. 6 section N Bid quote)
6.1	Develop and submit Data Collection/Data Capture methodology and a digitised building footprint GIS methodology plan

Task ID	Part A, B and C : Deliverables and work program
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 & Train data collectors
6.4	Collect / Verify and Capture Data (data, digitised building footprints – GIS layer, sketches, 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
6.8	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications
7	**RESIDENTIAL Valuations** (table 1 cross ref to No. 6 section N Bid quote)
7.1	Generate values (Draft Value per property/Draft Valuation Roll) • CAMA models and mass valuation methodology
7.2	Undertake Value Review and quality assurance • Identify anomalies • Sales ratio study (assessed value versus sale price) • Report on final values which deviated by more than 10% from original draft values • Adjust values where necessary
7.3	Value Finalisation with Final Values, Photographs and Sketches available / uploaded to the VRMS (Final Value per property / final valuation roll)
7.4	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications
8	**Data collection NON RESIDENTIAL** (table 1 cross ref to No. 6 section N Bid quote)
8.1	Develop and submit Data Collection/Data Capture methodology and a digitised building footprint GIS methodology plan
8.2	Prepare & submit training manuals & Data collection forms (to be read with annexure D)
8.3	Collect / Verify and Capture Data (data, digitised building footprints – GIS layer, sketches, 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
8.7	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications
9	**Non Residential Valuations** (table 1 cross ref to No. 6 section N Bid quote)
9.1	Valuations (draft values)
9.2	Undertake Value Review and Quality Assurance • Identify anomalies by reviewing units of comparison over values • Report on final values which deviated by more than 10% from original draft values • Adjust values where necessary
9.3	Value Finalisation with Final Values, Photographs and Sketches available / uploaded to the VRMS (Final Value per property / final valuation roll)

Task ID	Part A, B and C : Deliverables and work program
9.4	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications
10	**Valuation roll**
10.1	Compile and print Final General Valuation Roll certified by the Municipal valuer and hand over to municipal manager. Generate section 49 (1) of MPRA for external printing
10.2	Upload the General Valuation Roll and Objections forms to designated Website
10.3	Close out report - General Valuation **Annexure E** (table 1 cross ref to No. 5.4)
10.4	Provision and submission of all General Valuation data, documents, reports and information generated from the general valuation in terms of the bid specifications and the MPRA
11	**General Valuation Objections / Appeals processing and management** (table 1 cross ref No. 5.5 & 5.6)
11.1	Process objections GV • Record objections in database • Respond in writing to 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
11.2	Close out report on objections **Annexure F** (table 1 cross ref item 5.6)
11.3	Process Appeals GV • Record appeals in database (roll) • Make available sales evidence in support of decision upon request • Represent the Municipality at Valuation Appeal Board hearings • GIS cadastral layer of appeals received with decisions and changes
11.4	Close out report GV appeals **Annexure G** (table 1 cross ref item 5.8)
12	**Updating of valuation rolls:** Perform the functions of the municipal valuer, preparation of supplementary valuations and preparation of an annual supplementary valuation roll in terms of the MPRA and Bid specifications with the Annexure "H" report. (table 1 cross ref item 7)
12.1	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(First Financial Year after GV effective date)**
12.1.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(First Financial Year after GV effective date)**
12.1.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(First Financial Year after GV effective date). Annexure H**

Task ID	Part A, B and C : Deliverables and work program
12.1.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79
12.2	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Second Financial Year after GV effective date)**
12.2.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Second Financial Year after GV effective date)**
12.2.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Second Financial Year** after GV effective date) **Annexure H**
12.2.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79
12.3	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Third Financial Year after GV effective date)**
12.3.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Third Financial Year after GV effective date)**
12.3.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Third Financial Year** after GV effective date) **Annexure H**
12.3.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79
12.4	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Fourth Financial Year after GV effective date)**
12.4.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Fourth Financial Year after GV effective date)**
12.4.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Fourth Financial Year** after GV effective date) **Annexure H**

Task ID	Part A, B and C : Deliverables and work program
12.4.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79
12.5	**Updating of valuations rolls**: Perform the functions of municipal valuer, conduct supplementary valuations, prepare an annual supplementary valuation roll with associated activities, including the section 78 and 49 administrative support and notifications and provide data and information extracts from the VRMS as required by the municipality. (Includes full review and objections processing) **(Fifth Financial Year after GV effective date)**
12.5.1	**Updating of Valuation Roll GIS Cadastral layer:** In ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver annually with each Supplementary Roll. **(Fifth Financial Year after GV effective date)**
12.5.2	**Supplementary Valuation Roll report:** Includes body of evidence to confirm MPRA compliance and full review, objection and appeals processing one roll per annum **(Fifth Financial Year** after GV effective date) **Annexure H**
12.5.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79
13	**Valuation roll management system (VRMS) (Available, licenced and functional as per bid and bid specifications)** (table 1 item cross ref with No. 8 section N Bid quote**).** Includes all data extracts / exports required at least monthly.
13.1	VRMS Licence SLA Year 1 (first Financial Year after GV effective date)
13.2	VRMS Licence SLA Year 2 (second Financial Year after GV effective date)
13.3	VRMS Licence SLA Year 3 (third Financial year after GV effective date)
13.4	VRMS Licence SLA Year 4 (fourth Financial Year after GV effective date)
13.5	VRMS Licence SLA Year 5 (fifth Financial Year after GV effective date)

4. LEGISLATIVE CHANGES

The Bidder is hereby advised that the MPRA and its implementation is governed by legislation which may change and be amended from time to time and which may be promulgated during the contract period. The municipality therefore reserves the right to review the contractual obligations of the successful service provider to ensure compliance with the MPRA amendments.

5. INFORMATION TO BE PROVIDED BY THE MUNICIPALITY

(1) The current valuation roll was implemented on 1 July 2022 and will expire on 30 June 2028.

During the period of the valuation roll, 3 supplementary valuation rolls have been produced with the last supplementary valuation roll having been published in the provincial gazette in terms of the MPRA section 49 on 06 March 2025.

(2) The Municipality shall provide the following information –

(a) Information on data availability and confidence levels as per **Annexure A** to assist with the bid pricing.

(b) The number of properties with associated actual use / category of property type is inserted into the pricing schedule Section N of the Bid quotation Document for the current valuation roll with a summary of the current valuation roll and categories of property provided in the table (i) and (ii) below –

(i) Table of Umuziwabantu Municipality - Current Roll properties (Part of Section "N" Part B)

CATEGORY	No. of properties	Total Market Value
AGRICULTURAL	390	R1 180 477 000
COMMERCIAL	88	R529 908 000
COMMUNAL PROPERTY	22	R142 190 000
INDUSTRIAL	34	R109 556 000
MULTI PURPOSE	22	
MUNICIPAL	83	R64 580 000
PLACES OF WORSHIP	18	R25 219 000
PROTECTED AREAS	1	R1 700 000
PUBLIC BENEFIT ORGANIZATION	8	R23 570 000
PUBLIC SERVICE INFRASTRUCTURE	39	R4 240 000
PUBLIC SERVICE PROPERTY	78	R486 477 000
RESIDENTIAL	2523	R723 558 500
VACANT LAND	305	R27 938 000
		R3 319 413 500

(c) an electronic extract of the current consolidated valuation roll (Part A) shall be made available by the municipality.

(d) The municipality takes no responsibility for the accuracy of the data and information provided in terms of the bid.

6. PROJECT START DATE

The successful service provider must be ready to assume work on date of appointment by the municipality.

7. COMPULSORY HUMAN RESOURCES, SYSTEMS, DOCUMENTS AND COMPETENCIES REQUIRED TO QUALIFY AS A SERVICE PROVIDER (Read with Section "H" Bid Quote Document)

(1) The Service Provider must provide a human resources plan as contemplated in Section "H" and provide named resources, each with their capability profile and CV's, demonstrated knowledge and experience in their assigned function.

(2) The resource plan must include the following key resources, the numbers assigned and their percentage availability –

(a) a Municipal Valuer must be a person registered as a Professional Valuer or Professional Associated Valuer (with no restrictions) with the South African Council for the Property Valuers Profession in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000) and must have at least 5 years of experience in performing municipal valuations;

(b) Assistant Municipal Valuers who must be registered as a Professional Valuer, Professional Associated 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 and administrative staff.

(3) The bidder with reference to the municipal valuer, the resource plan and the bid must demonstrate competencies, knowledge and experience in the following areas –

(a) individual valuation of property,

(b) mass valuation of property,

(c) mass appraisal techniques and practices,

(d) deeds registry office, the office of the surveyor general and associated information,

(e) property register development and maintenance,

(f) geographical information systems (GIS),

(g) valuation roll data collection,

(h) valuation roll data capture, management and security,

(i) categorisation of property for rating,

(j) market research and sales analysis,

(k) communication and reporting,

(l) quality assurance and performance monitoring,

(m) objections and appeals processing and defence,

(n) hardware and software: valuation roll management systems,

(o) project management.

(4) The Service Provider must comply with the provisions of the bid document specifications in terms of clause 10 and Section “O” of the bid quote document.

(5) The Bidder must submit proof of Professional Indemnity Insurance for the nominated professional persons up to the Bid Contract price tendered.

(6) The Bidder must submit proof of Public Liability Insurance held by the Bidder to an amount of the contract price tendered.

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

8. VERIFICATION OF THE MUNICIPAL VALUER, ASSISTANT MUNICIPAL VALUERS AND HUMAN RESOURCES

In terms of the bid the Municipality is entitled to verify the qualifications, registration and experience of the nominated Municipal Valuer, Assistant Municipal Valuers, GIS and Data Manager and Project Manager.

9. MPRA AND VALUATION STANDARDS, QUALITY ASSURANCE AND MONITORING

(1) Steering Committee and project / cost monitoring

The successful Service Provider will be required to attend monthly steering committee meetings at the municipality and prepare and present reports on project progress, and the municipality will measure the progress and project claims against the project work program, the bid pricing, the scope of work and the bid specifications.

Progress claims by the service provider will only be approved once the municipality is satisfied that the bid scope of work has been delivered.

(2) MPRA and Municipal valuation practices, methods and standards

In terms of the MPRA section [s45.] “Valuation” - (1) Property must be valued in accordance with generally recognised valuation practices, methods and standards, and the provisions of the MPRA and regulations.

With reference to the above, the Service Provider must consider and take account of the recognised valuation practices, methods and standards such as the International Valuation Standards (IVS) on valuations, the International Association of Assessing Officers (IAAO) technical standards, as amended from time to time, and in addition the specifications of this bid.

(3) Data collection quality assurance

(a) A data collector must undergo training in data collection and property inspection routines and obtain a pass rate of at least 75% 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 (field sheets) and in accordance with the approved data collection manuals. Data collection may include the collection of digital

photographs. 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 by an assigned data collector supervisor who must review at least 10% of the properties within a batch by category of property and measured in accordance with the specifications and the approved data collection manuals.

(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) Market, cost, 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) A designated data collector who after ongoing training, continually produces data collection errors must have their designation withdrawn by the Municipal Valuer.

(l) The Service Provider must where applicable collect and deliver digital photographs of buildings to a specification approved by the municipality which must be uploaded to the relevant property record of the valuation roll.

(m) Notwithstanding s45 (2) (a) of the MPRA which provides that inspections of a property is optional, the municipal valuer must consider the availability and sufficiency of property data in association with its value, and then decide on the merits to physically inspect a property or a group of properties to verify or collect data in order to perform a credible valuation.

(4) Data capture/upload quality assurance

(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.

(g) A data capturer who after ongoing training, continually captures data incorrectly must be withdrawn by the Municipal Valuer.

(h) Data must be capable of being captured and uploaded to the valuation roll management system in terms of the Bid specifications and extracted for reporting.

(5) Quality control: Data measurement and accuracy

The measurement and accuracy of data for properties recorded in the valuation roll and valued is as follows –

(a) Area measurement data, such as building size, to be accurate within 10 percent. If areas, dimensions, or volumes must be estimated, the property record should note where quantities are estimated.

(b) For each objective, categorical, or binary data field to be collected or verified, at least 90 percent of the coded entries should be accurate. Objective, categorical, or binary data characteristics include such attributes as land / building size, number of bedrooms.

As an example, if a data collector collects 10 objective, categorical, or binary data items for 100 properties, at least 900 of the 1,000 total entries should be correct.

For each subjective categorical data field collected or verified, data should be coded correctly at least 90 percent of the time. Subjective categorical data characteristics include data items such as quality grade, physical condition, and architectural style.

(c) A quality control program is necessary to ensure that data accuracy standards are achieved and maintained. Independent quality control inspections should occur immediately after the data collection phase begins.

The inspection process should review samples of work for completeness and accuracy and keep tabulations of items coded correctly or incorrectly, so that statistical tests can be used to determine whether accuracy standards have been achieved. Stratification by geographic area, property type, or individual data collector can help detect patterns of data error. Data that fails to meet quality control standards should be re-collected.

(d) The accuracy of data should be judged primarily by conformity with written specifications and examples in the data collection manuals.

(e) Data captured onto the valuation roll management system must be reviewed for completeness and correctness by applying the same data quality assurance as data collection.

(6) Maintaining valuation 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 technical standards of the International Association of Assessing Officers (IAAO) as well as any valuation standards, methods and guidelines developed and adopted by KZN-COGTA and/or SACPVP.

(e) undertaking a ratio study of valuations to sales prices and other appropriate statistical measures to establish the accuracy of valuations including the relative treatment of higher value and lower value property and report on the consistency and uniformity of values placed on the roll as envisaged by section 82 (2) of the MPRA and in accordance with mass valuation standards and practices.

10. VALUATION ROLL MANAGEMENT SYSTEM (VRMS)

(1) Introduction

A valuation roll management system (VRMS) is software which supports the production of the property register, the production of valuation rolls, the management of data such as property, valuation and sales, and provides a solution for the valuation of property and the preparation and updating of valuation rolls, which must support the creation, editing, updating, deletion, storage and search of data applicable to systems for valuations of property and rolls and the functions of the municipal valuer in the performance and delivery of this bid.

(2) General functionality

The Service Provider must supply the valuation roll management system (VRMS) in terms of the bid for the duration of the bid and ensure that system functionality, system operability and security of data is maintained to deliver the scope of the bid. To be read in conjunction with Section “O” of the bid quotation document.

A valuation roll management system must have the ability to export and import data, to record changes and to produce audit reports and must include the following functionality-

a) be able to support the production of the property register (valuation roll part A), the production of valuation rolls, the management of property, sales and valuation data and the valuation of property.

b) cater for the management, maintenance and production of valuation rolls with reference to the MPRA and these standards.

c) be capable of creating, editing, updating, deleting, archiving, storage and searching of data and records applicable to the valuation roll and must include the property data and sales file records and provide for a full history of any changes for audit purposes.

d) be capable of storing and accessing the previous valuation roll records and values for any enquiry and for audit purposes.

e) be able to cater for a unique property identifier for each valuation roll record, comprising the Surveyor General Code 21 digit and the extended 26 Digit code in terms of adopted SACPVP standards.

f) be compatible with industry recommended GIS ESRI software.

g) be able to integrate with the municipality's financial system with reference to linking by a common unique property identifier to support the synchronisation of the valuation roll and financial management system for rates.

h) be capable of determining values using applied data for either CAMA or NON-CAMA type methodology.

i) be able to store and view images, notices and electronic files against records of the valuation roll.

j) be capable of producing, exporting and extracting valuation rolls and reports of data from the VRMS in electronic format to a spreadsheet, database or CSV format. These reports must be extractable in a flat file format and in accordance with the structure, format and content specified in the bid specifications.

k) have the functionality of updating the valuation roll with new data or editing data as envisaged in terms of the MPRA, and have the ability of producing reports of all changes reflecting the old and the new information, the difference in the values up or down with the effective date of the change and allow for the capturing of the applicable reason for the change.

l) be secure with adequate backup of data to ensure that critical valuation data cannot be manipulated or corrupted and that backup data can be accessed, recovered and used in the case of a disaster.

m) have security and access control in terms of data management.

n) have management procedure for system changes with audit trails of changes to manage and control.

(3) Compatibility with municipal GIS system

The valuation roll management system must be compatible with the Municipality's GIS software and systems and the ESRI Platform.

(4) Compatibility with municipal financial system

The valuation roll management system must be compatible with the municipality's financial system MUNSOFT to ensure that the roll and financial systems can be and are synchronised.

(5) Storage and maintenance of data

The valuation roll management system must be able to store, maintain, extract and extract All data captured on the valuation roll management system as specified in terms of bid specification document in a flat file format, and must be able to search entries with a full history of any changes for audit purposes. The valuation roll management system must be able to store scanned and electronic files against a property shown in the valuation roll.

(6) Reporting functionality

The valuation roll management system must be capable of producing and extracting the following report types in a format approved by the municipality, typically in electronic format to spreadsheet, database eg MS Excel, MS Access or CSV format. The reports must be developed with fields designed according to the requirements of the municipality-

(a) extract of the valuation roll;

(b) extract of all valuation roll data including data per property type in the specified template format;

(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;

(f) sales report per homogeneous area.

(g) generating the valuation roll directly from the valuation system in the required format prescribed by the MPRA and regulations.

(h) able to generate and print Section 49(1) notices

(i) able to generate and print Section 78 (5) supplementary valuation notices of review results

(j) able to generate and print Valuation Certificates

(k) able to generate and print Section 78 (5) notices of supplementary changes

(l) able to generate and produce reports as contemplated in terms of section 34 and 81 reporting.

(7) 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.

(8) Valuation support

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

(9) Valuation Roll updates

The valuation roll management system must be capable of updating the valuation roll with new data or edited data for the valuation of property and updating the category of properties as envisaged in terms of section 78 and 79 of the MPRA, be capable producing reports of all changes reflecting old and new information, the difference in the values up or down with the effective date of the change and the capturing of the applicable section 78 reason for the change.

(10) 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 ensure that the existing (previous) valuation roll is stored electronically on the main database for cross reference and audit purposes.

(11) Property data take-on and population into VRMS

The Service Provider must, at its own cost take-on existing valuation roll / property data as provided by the municipality on appointment to support the functions of the municipal valuer and updating of the valuation roll, which may be by importing, uploading, capturing or by any other means necessary, and the municipality may perform a quality review to confirm the data take-on.

(12) VRMS provision by municipality

The municipality is entitled to annually review it's IT systems and software and may decide to acquire its own system or licence to use a VRMS to support the MPRA, and the successful Service Provider will be required to interface and integrate all necessary valuation roll and property data with the municipality's VRMS at the expense of the municipality.

11. DATA SECURITY AND RECOVERY

(1) The valuation roll management system must be secure with sufficient backup of data performed to ensure that critical data cannot be manipulated or corrupted and that backup data can be accessed and used in the case of a disaster.

(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 – PART A (VALUATION ROLL)

(1) The service provider must comply with the MPRA and Bid specifications in the preparation, compilation and updating of the property register;

(2) In the context of the bid specifications read with the MPRA, **Property Register** — means a consolidated valuation roll which comprises (with reference to Section 23 Part "A" of the "register of properties") the valuation roll, with all properties required to be listed under Section 30 (3), and encompassing;

(i) supplementary valuations and roll updates in terms of sections 78 and 79 of the MPRA;
(ii) objection and appeal decision roll adjustments;
(iii) the corresponding valuation roll property valuation database of all property data, and;
(iv) the corresponding Valuation Roll GIS cadastral layer,

ALL of which must be aligned to the ''definition of property'' namely (a) registered deeds office records (full title and sectional title), (b) registered rights against immoveable property, (c) land tenure rights, (d) public service infrastructure (PSI) records and all other rateable property by way of apportionment in terms of section 9 of the MPRA;

(3) The designated municipal valuer is responsible and accountable for the accuracy and updating of the property register and must ensure compliance with the requirements of the MPRA and the bid specifications in drawing up and maintaining a register of properties (PART A of the property register) situated in the municipality, which must be in accordance with the MPRA definition of "property", the definition of "property register'' in terms of the MPRA and the bid specification and taking account of the adopted rates policy of the municipality;

(4) The consolidated Valuation Roll must be managed, prepared, maintained in terms of the MPRA content of valuation rolls (s48) and the specified structure, format and content contained in the bid specifications;

(5) The Valuation Roll GIS cadastral layer in ESRI platform must be managed, prepared, maintained in accordance with the bid specifications contained in Annexure "C" and the associated GIS attribute table must comply with the specified structure, format and content contained in the bid specifications template B;

(6) The municipal valuer must in drawing up and maintaining a property register, include all properties required to be listed in the municipality in terms of section 30 (3);

(7) The municipal valuer must in drawing up and maintaining a property register, take into account the rates policy of a municipality which may include properties subject to exemptions and reductions impacting on the valuation roll;

(8) Land extent determination must be as follows –

(a) For registered properties, the land extent from the deeds office must be used as the primary source data for the compilation of the property register however the land extent must be verified and corroborated against the land extent from the corresponding approved property survey diagram in cases of major discrepancies.

(b) For other rateable property such as property that is subject to land tenure rights and public service infrastructure the land extent must be determined with reference to recognised source registers and information.

The land extent verified to be used for the property register (valuation roll) and converted and depicted in square metres (m²).

(c) The determined land extent must then be compared to the calculated GIS extent for each property and major anomalies identified for investigation and correction.

(9) The property register with the corresponding valuation roll GIS cadastral layer must be accurately maintained in accordance with the bid specifications and must include supplementary valuation roll updates;

(10) Each property listed on the property register (valuation roll) must have a captured and maintained unique property identifier on the roll system and on the rates billing system., specified as the 21 Digit Surveyor General Code plus 5 suffixed digits = 26 digits, for all defined properties to support linking to other municipal databases such as the financial management system of the specific municipality and the valuation roll GIS cadastral layer.

This property identifier must be unique, without duplicates, and remain constant for the life of the property. The standards adopted by the South African Council for the Property Valuers Profession (SACPVP), namely South African Standard: Municipal Valuations for Property Rating, specifies that the Surveyor General Code SG 21-digit Code, derived, and created from the property description, be applied for all registered full title property defined in terms of part (a) of the definition of property.

For all other MPRA defined property, Part (a) Sectional Title, Part (b) Registered Rights, Part (c) Land Tenure Rights and Part (d) PSI, and apportioned multiple purpose use property in terms of sections 8(2)(i) and 9(2), an added suffixed 5 digits to the SG 21-digit code must be assigned by the designated municipal valuer, thereby creating a unique 26-digit code.

The municipal valuer and municipality must ensure that the SG21 digit code and 26-digit coding system is applied and implemented in terms of standards of SACPVP in their valuation roll management system and financial billing system and engage with their systems service providers to implement and maintain the standard adopted on the unique property identifier (UPI). Annexure D of the GV Bid specifications provides the details of the templates and the formats and structure of the database fields to be created and maintained;

(11) The valuation roll (consolidated roll) must have a one-to-one match to the Valuation Roll GIS Cadastral Layer (for defined and recognised property), excluding sectional title units within a sectional title scheme and any property which is unreasonably difficult to create and display spatially on the GIS;

(12) All property register and property data prepared and created for the general valuation and updating of supplementary valuation rolls in performing the function of the municipal valuer and all associated property data must be fully extractable in electronic format (database, spreadsheet, excel, csv) in a flat file format from the VRMS on request by the municipality to support budgeting and quality control/assurance in accordance with section 48 “Contents of Rolls’’ and the structure, format and content as required in terms of the bid specifications templates A, B, C and D, under Annexure D.

(13) In the preparation of a general valuation it is essential that the available consolidated valuation roll, the valuation GIS cadastral layer and the financial system billing data is considered and applied.

(14) **Property register (valuation roll) components and deliverables**

The Service Provider must prepare and deliver the following –

(a) an up-to-date property register with the valuation roll (Part A of the register) of the municipality with corresponding property data of all defined rateable property in accordance with the structure, format and content in terms of the bid specifications as certified by the municipal valuer, and any data supplied must be in an electronic format (database, spreadsheet, excel, access or csv) in a flat file format from the VRMS;

(b) an up-to-date valuation roll GIS cadastral layer which must comply with the specifications contained in Annexure C in an ESRI shape file format aligned to the property register database and in accordance with the structure, format and content in terms of the bid specifications template B;

(c) a report of the mismatches between the valuation roll database and the valuation roll GIS cadastral layer with reasons for mismatches and mismatch corrective action plan, which must be corrected by the service provider;

(d) the original deeds data extract used in the preparation of the valuation roll.

(15) **Property register (valuation roll) maintenance and deliverables**

(a) The Service Provider must maintain the valuation roll GIS cadastral layer by correcting any mismatches and updating the valuation roll (Part A of the property register);

(b) The Service Provider must provide periodic extracts / reports of the consolidated valuation roll with reference to the bid defined “property register” to support the financial budgeting, reconciliation and quality control/assurance of the roll in terms of the MPRA and specifications, and any data supplied must be in an electronic format (database, spreadsheet, excel, access or csv) in a flat file format from the VRMS in accordance with the bid specifications;

(c) All MPRA and valuation roll extracts and reporting must be in accordance with the bid specifications structure, format and content and any amendments approved by the municipality from time to time.

13. GENERAL VALUATION AND VALUATION ROLL

(1) Introduction

(a) The Service Provider must undertake a general valuation and prepare a valuation roll of all rateable property in terms of the MPRA and municipal valuations for property rating, taking account of generally recognised practices, methods and standards and the bid specifications.

(b) Annexure "A" of the bid specification is to be considered by the bidder to assist the bidder in understanding the availability and confidence of the data and information to support the bid. Notwithstanding the Annexure "A" schedule content, the municipality does not accept any responsibility or liability for the quality, accuracy, availability and confidence of the data and information therein either before or after a bid award. No additional costs or variations to the bid relating to data, sales, market reports, GIS, or any other related information will be entertained by the Umuziwabantu Municipality.

(c) The basis of valuation is market value in terms of s46 (1) of the MPRA which states "Subject to any other applicable provisions of this Act, the market value of a property is the amount the property would have realised if sold on the date of valuation in the open market by a willing seller to a willing buyer".

(d) Sufficient resources should be assigned and dedicated to support a general valuation and the updating of valuation rolls to ensure compliance with the MPRA and applicable standards. The municipality reserves the right to review the HR plan submitted by the successful bidder and interview the municipal valuer and professional resources allocated to verify persons and time allocations to support the bid.

(e) Aerial photography (orthophoto mosaics) must be supplied and delivered by the service provider to the municipality with the certified GV valuation roll in accordance with the bid specifications contained in Annexure "B". For towns and developing areas the imagery must be within 12 months of the date of valuation.

(2) Contents of valuation roll (s48 and regulations)

The particulars in **section 48 (2)** of the MPRA must be recorded in the valuation roll as well as any additional data specified in the bid under the templates.

(3) 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 and during the contract period to ensure alignment of the valuation roll and the category of property based on adopted rates policy of the municipality.

(4) Data collection, capture and management

(a) Valuation / property data must be collected and captured accurately taking account of the data to be collected by property valuation type under **Annexure D with reference to the Templates (A, B, C and D)** and the data availability and quality confidence levels in **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) To support data collection, capture and management the following inspection rules apply–

(i) At least 10% of the valuation roll records shall be reviewed and if necessary inspected per annum for data verification or recollection for the duration of the contract.

(ii) The identification of property for inspection must be at the discretion of the municipal, valuer and may include new buildings, building additions and alterations, illegal buildings, new subdivisions and rates clearances / property sales.

(iii) Data corrections must be updated and a supplementary valuation performed where applicable.

(iv) The inspections must be recorded on the VRMS to manage and monitor the progress.

(c) The Service Provider is responsible for data collection and data capture into the valuation roll management system (VRMS) approved by the municipality for the duration of the contract.

(d) The municipal valuer must collect, verify and maintain property data for each property required to be valued in a uniform and accurate manner, and in accordance with the minimum data referred to in the bid specifications, Annexure D and the templates.

(e) The municipal valuer must ensure that all property data collected, verified and maintained is captured in a valuation roll management system (VRMS) in accordance with these standards, and the templates referred to in the bid documents Annexure “D” to support data access, extracts and exports on request by a municipality.

(f) Data collected and captured must be capable of being extracted, reported, checked, audited, verified, monitored and integrated to the rates financial system for the levying of rates.

(g) The Service Provider must allow access to and provide extracts and copies of ALL data, information, reports, methodology, manuals, CAMA models, and documents during business hours at no additional cost, and for data must be provided in a standard electronic format, ie csv, spreadsheet or database, in accordance with the structure, format and content of the bid specifications, Annexure D and templates, upon request by the municipality.

(h) The Service Provider must develop and provide data collection training manuals and data collection forms per property type, taking account of the data structures, format and contents specified in the bid, prior to the commencement of the data collection phase of the general valuation.

(i) Aerial photography must comply with the specifications of the bid document and may be used under the following conditions –

(i) as a visual aid 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.

(j) 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),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.

(k) Data must be collected by the service provider for new buildings and structures, new properties, ownership changes and errors identified by the municipal valuer and the Municipality from project start date up to 2 months before the final valuation roll is certified on 31 January 2028.

(l) For supplementary valuations and roll updating, the Service Provider must collect valuation roll property data for changes in terms of section 78 and 79 of the MPRA from the date of last collection / capture (ie close off of the GV Roll) and for the duration of the contract.

(m) Objections and appeals lodged must be inspected and property data reviewed /recollected by the service provider to ensure valuation correctness and to support the Valuation Appeal Board decisions for the duration of the contract.

(n) 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.

(5) **Market Report**

(a) The Service Provider and the municipal valuer must research and prepare a market report for every general valuation and for each property sector listed below irrespective of the valuation approach, and the market report must contain researched and analysed market data and comprise the three primary valuation approaches, namely (1) direct sales comparison approach, (2) the income approach and (3) the cost approach. The market reports must be fully motivated and provide methodologies, market data research and the sales, income and cost analysis upon which the general valuation is based per property sector and include the standard units of comparison rates.

The Guidance: Market Report Format and Content to be followed to enhance uniformity and standardisation in terms of **ANNEXURE M** of the bid specification document. All market data, analysis and market evidence must reference to the date of valuation used for the general valuation.

(b) A consolidated market report as envisaged by the bid must be prepared, approved and certified by the municipal valuer and submitted with the certified valuation roll for each general valuation and must at least include the submission of the following –

1) Specimen Data collection forms designed, developed, and applied for general valuation.

2) Individual spreadsheet or template as developed and approved by the municipal valuer completed with associated value calculations for each property valued individually.

3) Full extract of the Deeds office sales for full title and sectional title property used for the general valuation (format - csv, spreadsheet or database).

4) **Residential property** database (Annexure D Sales Template D) of sales and proxy sales categorised into “valid” or “invalid” and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).

5) **Non-Residential Income producing property** database (Annexure D Sales Template D) of sales and proxy sales categorised into “valid” or “invalid” and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).

6) **Non-Residential Income producing property** market database (Annexure D Sales Template D) and research relating to rentals, vacancies, expense ratios, capitalisation rates and any other data required for the determination of market value. (format - csv, spreadsheet or database).

7) **Agricultural property** database (Annexure D Sales Template D) of sales and proxy sales categorised into “valid” or “invalid” and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).

8) **Non-Residential Cost** database (Annexure D Sales Template D) relating to costs of construction must be sourced from a quantity surveyor to support the determination of the estimated new replacement cost for all non-residential and specialised properties where the cost approach method is applicable. (format - csv, spreadsheet or database).

9) **Vacant Land** database (Annexure D Sales Template D) of sales and proxy sales categorised into "valid" or "invalid" and the neighbourhood / homogeneous area within which it is located. The proxy sales and control valuations used as sales must be flagged in the valuation roll management system for ease of reference. (format - csv, spreadsheet or database).

(c) 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 in a GIS spatial format (ESRI) shape file which can be accessed by the Municipality and the Valuation Appeal Board.

(d) 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 used as sales must be flagged in the valuation roll management system database for easy identification.

(e) 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.

(f) 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.

(g) 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.

(h) 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.

(i) The Service Provider must prepare and maintain a sales file of all sales reviewed, including proxy sales, analysed and researched for a general valuation to support the market report in terms of Template "D" of the bid specifications.

(j) The Service Provider must include all CAMA models, methodologies, calculations and formulas in the market report and submit with the certified valuation roll, where CAMA has been applied.

(6) Valuation

(a) The Service Provider must determine and provide a market value for each property identified in the property register (section 23 - Part A), except for property exclusions from valuation by the Municipality in terms of the MPRA.

(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) Notwithstanding s45 (2) (a) of the MPRA which provides that inspections of a property is optional, the municipal valuer must consider the availability and sufficiency of property data in association with its value, and then decide on the merits to physically inspect a property or a group of properties to verify or collect data in order to perform a credible valuation.

(e) If the Service Provider values a property by using computer assisted mass valuation/appraisal systems and techniques, the Service Provider must ensure that it has the necessary expertise and that it follows the mass valuation guidelines of the International Association for Assessing Officers (IAAO) as recognised by the South African Council for the Property Valuers Profession and that it has the necessary skills to perform and deliver such mass valuations;

(f) 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;

(g) The Service Provider must in determining a market value for each property determine the valuation approach or approaches (if more than one approach is required) to value each property. The common valuation approaches are (1) Direct sales comparison approach, (2) Income approach and (3) Cost approach.

(h) The Service Provider must –

(i) determine, decide and capture against each property valued, which properties are valued by CAMA and which properties are valued by NON-CAMA individual approach,

(ii) for all properties valued, provide the specified data, property data, market data, income data, cost data, market reports and valuation templates prepared as part of the general valuation and the bid specification,

(iii) when deciding to value property individually also consider the relevance of and take into account the International Valuation Standards (IVSs) in the valuation approach and methods applied to determine the market value as defined in the MPRA.

(i) If the Service Provider values a property on an individual basis, a valuation template must be developed based on the property being valued and a separate valuation template completed for each property valued and submitted with the certified valuation roll and for every subsequent supplementary valuation performed.

(j) In valuing property the Service Provider must ensure that it follows the International Valuation Standards (IVS), the Standard on Municipal Valuations for Property Rating and the technical mass valuation guidelines of the International Association for Assessing Officers (IAAO) as recognised and adopted by the South African Council for the Property Valuers Profession.

(k) The Service Provider must produce and deliver draft values at least two (2) months (1st December), before the delivery of the final certified valuation roll and the values must have been substantially reviewed.

(l) Valuation calculation templates, computer assisted mass appraisal CAMA techniques, CAMA models and motivations, data collection forms and information used to determine the values and prepare the valuation roll must be delivered with the final certified valuation roll, based on the applicable methodology CAMA / NON-CAMA.

(m) The Service Provider must ensure that the municipality is divided up into market areas or homogeneous areas to accommodate computer assisted mass appraisal techniques and modelling to support mass valuations.

(n) A spatial GIS layer and database of the market areas / homogeneous areas must be prepared and delivered to the municipality on delivery of the draft roll and the final roll which must be reflective of the CAMA modelling applied.

(o) The Service Provider must in terms of the MPRA Section 34 (aA), subject to section 81(1B), as part of the process towards submitting a valuation roll contemplated in paragraph (b), after appointment and until submission of the certified valuation roll, submit a monthly progress report to the municipal manager on the valuation of properties, regardless of whether properties are valued in terms of section 45(2)(a) or in terms of a combination of section 45(2)(a) and (b).

(7) Value review (quality assurance)

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

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

(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 supported by physical inspections (where necessary).

(d) In the case of property data amendments, the Data Collection Forms and data must be updated to the VRMS for system value re-generation and final value review.

(e) The value review must –

1) Compare the records in the new valuation roll against the current consolidated valuation roll, the valuation roll GIS cadastral layer and the current financial billing system data for any anomalies and missing records for investigation and correction. The exercise should include comparison of physical records, values, ownership and categories of property;

2) Identify and investigate any missing / zero data or values;
3) Compare the gross building extents captured on the VRMS against digitised building extents taking account of the number of storeys and identify and investigate major anomalies (where applicable);
4) Review values based on rates per unit of comparison to identify inconsistencies for correction;
5) Screening of highest and lowest values in terms of use and neighbourhood for abnormal values;
6) Review the new valuation roll values and categories against previously decided objections and appeal decisions to identify any anomalies.
7) 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;
8) Compare building areas collected against the digitised areas for major anomalies for further investigation;
9) Ensure that each property has been valued equitably in relation to other like properties;
10) Determine value uniformity by conducting sale ratio studies in terms of International Association of Assessing Officers IAAO guidelines;
11) Assess the category assigned to each property for reasonableness.

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

(g) 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.

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

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

(j) 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.

(k) 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.

(l) 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.

(m) 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.

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

(8) Copy right of valuation rolls and other data (s85)

(a) The Service Provider must comply with the MPRA section 85 and the bid specifications. As extracted from the MPRA - ***"Copyright of valuation rolls and other documents produced by municipal valuers, assistant municipal valuers or data-collectors in the performance of their functions, and data collected by municipal valuers, assistant municipal valuers or data-collectors for the purpose of preparing valuation rolls, vests in the municipality concerned."***

(b) The Service Provider must ensure that all data, property data, information, documents and reports including CAMA models and calculations produced in terms of the MPRA are available and handed over to the municipality on request. All data, property data, information, reports, files, and documents which are prepared, collected, gathered, formulated and/or researched during a general valuation and any supplementary valuation roll records of updating, belongs to the municipality and must be officially handed over to the municipality at the time that each certified valuation roll or supplementary valuation roll is handed to the municipality.

(c) The typical data, information, reports, files, and documents which are prepared, collected, gathered, formulated and/or researched include, however are not limited to the following –

1) General Valuation (GV) Roll certified (Hard Copy and electronic) if in a GV year
2) Supplementary Valuations and rolls (Hard Copy and electronic)
3) Consolidated Valuation Roll (current roll) (electronic)
4) Valuation Roll GIS cadastral Layer (electronic)

5) Property data (electronic)
6) General Valuation Sales File and GIS sales cadastral file (electronic)
7) General Valuation Deeds Extract (date stamped) for ownership and sales data (electronic)
8) Aerial Photography (electronic)
9) Data Collection Training Manuals (Hard Copy and Soft copy)
10) Sample Data Collection Forms – main property sectors (Hard Copy and Soft copy)
11) General Valuation Methodology by property sector (Hard Copy and Soft Copy)
12) General Valuation Market reports by property sector (Hard Copy and Soft Copy)
13) CAMA models (formula)
14) Data and Information pertaining to reviews, objection reviews and appeals (Hard Copy and Soft Copy).

(d) All specified data must be collated, prepared and handed over with every valuation roll certified or as required by the municipality in spreadsheet, database or CSV format and for the GIS data in an ESRI shape file format, in accordance with the bid specifications.

The following templates are the minimum data to be collected, captured, prepared and handed over in terms of the bid specifications and are referenced in detail in Annexure D Templates namely –

1) General Valuation (GV) Roll certified extract GV year **(Template "A1 – A2")**.
2) Consolidated Valuation Roll (current roll) extract **(Template "A1 – A2").**
3) Valuation Roll GIS cadastral Layer (ESRI shape file format) **(Template "B").**
4) Property data extract **(Template "C").**
5) General Valuation Sales File and GIS sales cadastral file extract **(Template "D").**

(e) The Service Provider must deliver a **draft** valuation roll and ALL data / templates, sales data, CAMA models, valuation roll GIS cadastral layer, methodology documents, market reports, training manuals, information and the aerial photography used in the general valuation at least two months before final delivery of the certified valuation roll to allow for review by the municipality.

The structure, format and content of the valuation roll and data provision must be according to the bid specifications and templates.

(f) A draft valuation roll must be sufficiently complete to enable the municipality to undertake quality assurance and review.

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

(h) The Service Provider must deliver a **final** valuation roll and ALL property data, the sales data, CAMA models, valuation roll GIS cadastral layer, methodology documents, market reports, training manuals, information and the aerial photography used in the general valuation to determine the values, by 31 January 2028.

The structure, format and content of the valuation roll and data provision must be according to the bid specifications and templates.

(i) The electronic copy of the final valuation roll in a csv, MS Excel or MS Access file format, in accordance with the specified data formats of the bid specifications, must be delivered to the Municipal Manager in a format suitable for synchronising with the Municipality's financial system MUNSOFT.

(j) The Service Provider must print and bind the final certified valuation roll in the format prescribed in terms of the MPRA and regulations as well as per requirements of the Municipality.

(k) The reporting and data extracts from the valuation roll management system (VRMS) may require customisation for standardisation from time to time as required by the municipality and the Service Provider will be required to follow and implement the customised reporting and data extracts.

(9) Quality assurance

The quality control and assurance measures must be in terms of this bid and the bid specifications.

(10) Close-out report

The Service Provider must produce a close-out report for the general valuation as contemplated in Annexure E.

14. OBJECTIONS

(1) The Service Provider must provide support to a municipality for the public notice and inspection period in terms of section 49, and attend to the objection process and deal with objections in compliance with sections 50, 51, 52 and 53 of the MPRA, including the following –

(a) the Service Provider must prepare, print and post the notices in terms of section 49 and 53 of the MPRA;

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

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

(d) the Service Provider must consider and decide objections and amend the valuation roll, where necessary based the Municipal Valuers decision;

(e) the Service Provider must make sales evidence in support of a decision regarding an objection available upon request by the Municipality;

(f) the Service Provider must give written reasons to the Municipal Manager for any Municipal Valuer decision where the value is adjusted by more than 10% up or down;

(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 service Provider must physically inspect each property which is the subject of an objection to ensure that data is reviewed and the property is valued correctly. The inspection must include liaison with the owner for verification of data and information.

(3) The service provider must ensure that the valuation roll is adjusted or added to in accordance with the decisions taken by the appeal board in terms of section 69.

(4) The processing and dealing with objections in terms of the MPRA is deemed part of the general valuation and annual maintenance fees and therefore no separate or added fee is payable for this service. Refer to Section N pricing schedule in Bid Quotation document.

(5) The Service Provider must produce an objection close-out report as contemplated in Annexure F.

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 appeals received and processed.

(2) The municipal valuer must attend to all appeals lodged and attend appeal hearings as required.

(3) The service provider must ensure that the valuation roll is adjusted or added to in accordance with the decisions taken by the appeal board in terms of section 69.

(4) The service Provider must review the objection data over a property that is the subject of an appeal and ensure that the property has been inspected at the objection stage to ensure that data is verified and the property is valued correctly. The review may include liaison with the owner for verification of data and information in preparation for an appeal.

(5) The Service Provider must produce an appeal close-out report as contemplated in Annexure G.

16. VALUATION ROLL MAINTENANCE (Updating of Rolls)

(1) Valuation Roll Maintenance means the performance of the functions of the municipal valuer as contemplated in section 34 and the updating of rolls in terms sections 77, 78 and 79 of the MPRA, and must include:

(i) liaison and communication with the ratepayer or Municipality on any matter omitted from or queried in the valuation roll or subsequent supplementary valuation rolls and the processing of supplementary valuations where necessary;

(ii) the updating of ownership and other particulars to the valuation roll and amendments of the valuation roll as contemplated in section 79 of the MPRA for the duration of the contract;

(iii) undertaking supplementary valuations in terms of sections 77 and 78 of the MPRA in respect of any rateable property—

(a) incorrectly omitted from the valuation roll;

(b) included in a municipality after the last general valuation;

(c) subdivided or consolidated after the last general valuation;

(d) of which the market value has substantially increased or decreased for any reason after the last general valuation;

(e) substantially incorrectly valued during the last general valuation;

(f) that must be revalued for any other exceptional reason;

(g) of which the category has changed; or

(h) the value of which was incorrectly recorded in the valuation roll as a result of a clerical or typing error.

(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 by the Municipality and adopted by a Council resolution.

(3) In terms of the MPRA section 78 (5) (a), the municipal valuer must on completion of the supplementary valuation contemplated in subsection (1) (a) to (g), and following a correction contemplated in subsection (1)(h), serve the results of the supplementary valuations or corrections contemplated in subsections (1) (g) and (h), by ordinary mail, or if appropriate, in accordance with section 115 of the Municipal Systems Act, on every owner of property who has been affected by a supplementary valuation contemplated in subsection (1)(a) to (g) and a correction contemplated in subsection (1)(h), a notice reflecting the supplementary valuation or correction of the property, as well as the particulars listed in section 48(2).

(i) The notice referred to in paragraph (a) must inform the property owner that he or she may lodge a request for review with the municipal manager in writing, within 30 days after the posting of the notice in respect of any matter reflected in the supplementary valuation.

(ii) The municipal valuer may adjust the valuation on consideration of the request for review contemplated in paragraph (b).

(iii) The service provider must manage all notifications and ensure that all correspondence and communications of supplementary valuations are archived and available on request by the municipality.

(iv) The service provider must on a monthly basis, forward all notifications in terms of section 78 (5) (a) and (b) of the results of the supplementary valuations and review decisions to the municipality for the rates adjustments and for audit purposes.

(v) The format and content of the s78 (5) notice must be prepared in accordance with the guideline issued and adopted by the KZN Provincial Steering Committee. Sample available.

(vi) The service provider, must, at least once a year, compile and publish a supplementary valuation roll of all properties on which a supplementary valuation, as contemplated in subsection (1) was made, including review decisions referred to in subsection (5)(b), and make it public and available for inspection in the manner provided for in section 49.

(4) The Service Provider must generate, print and post all Section 78 (5) (a)/(b) and Section 49(1) notices as part of administrative support.

(5) The Service Provider must attend to valuation roll queries received from ratepayers or the Municipality outside the objection and appeal process and update the valuation roll where necessary by supplementary valuation.

(6) The Service Provider must update the valuation roll with any supplementary updates including objections and appeal decisions which includes updating the valuation Roll GIS cadastral layer where spatial changes are effected.

(7) The valuation roll management system must reflect the old value, the corresponding new value, the effective date of the change and indicate the reason for the change and a report of all supplementary roll updates which must include the above reflected changes must be extractable on request by the municipality.

(8) The Service Provider must ensure that all property data, documents, correspondence, data collection forms and review forms emanating from the preparation of a supplementary valuation roll is provided and uploaded to the valuation roll management system against each affected property.

(9) The Service Provider must prepare, produce and supply a consolidated valuation roll in a csv, MS excel or MS Access format on an annual basis OR as required by the municipality in terms of the bid specifications.

(10) The Service Provider must prepare, print and bind a hard copy of the certified supplementary valuation roll in the format prescribed in the MPRA and regulations and submit the certified supplementary valuation roll to the Municipal Manager within the required time frames.

(11) An electronic extract of the supplementary valuation roll must be delivered to the Municipal Manager in csv, MS excel or MS access or in a format suitable for synchronising with the Municipality's financial system MUNSOFT.

(12) The Service Provider must prepare, generate and print the Section 49(1) notices for the applicable supplementary valuation roll for the duration of the bid.

(13) The Service Provider must produce an annual maintenance close-out report as contemplated in Annexure H.

(14) The Service Provider must attend to and dispose of all objections, appeals and reviews in terms of the MPRA at no add on cost except for the close out reports as contemplated in annexure (F) (Objections), (G) (Appeals) and (H) Supplementary Report (with objection and appeal) and the attendance at valuation appeal board hearing meetings which may be charged at a fee to be negotiated between the bidder and the municipality before the bid award.

ANNEXURE A

ANNEXURE A: ROLL / PROPERTY DATA AVALABILITY AND CONFIDENCE LEVELS

To support Bid Quote in terms of section "N"

NO.	ITEM OF INFORMATION	LEVEL OF AVAILABILITY AND LEVEL OF CONFIDENCE OF DATA		FORMAT OF DATA	ANNUAL AVERAGE COUNT OVER THE LAST THREE (3) YEARS
		Availability Score (AS) **1 = Fully available** **2 = Available with difficulty** **3 = Unknown**	**Confidence Score (CS)** **1 = High confidence** **2 = Medium confidence** **3 = Low confidence** **4 = Unknown**		
		Urban	**Rural**		
1	a. Valuation data collection forms from last GV cycle	a. AS = 2 CS = 3	a. AS = 3 CS = 4	Hard copy or scanned files	NA
	b. Valuation data (electronic extract) from last GV cycle	b. AS = 2 CS = 3	b. AS = 2 CS = 4	MS Excel or MS Access	NA
	c. Valuation templates and calculations (Non Residential Property)	b. AS = 2 CS = 3	b. AS = 3 CS = 4	Database or MS Excel	NA
	d. Methodology and Market reports from the last GV cycle	b. AS = 2 CS = 3	b. AS = 2 CS = 4	Documentation and data	NA
	e. Schedule of Sales applied by the municipal valuer in the last GV Cycle	b. AS = 2 CS = 3	b. AS = 2 CS = 4	Database, csv, MS Excel	NA
	f. Supplementary Rolls and entries since GV	b. AS = 1 CS = 3	b. AS = 1 CS = 4	Database, csv, MS Excel	SV entries pa
2	a. Approved Building plans	a. AS = 2. CS = 3	a. AS = 3 CS = 4	Hard copy for viewing and copying at Municipality	

NO.	ITEM OF INFORMATION	LEVEL OF AVAILABILITY AND LEVEL OF CONFIDENCE OF DATA		FORMAT OF DATA	ANNUAL AVERAGE COUNT OVER THE LAST THREE (3) YEARS
		Availability Score (AS) **1 = Fully available** **2 = Available with difficulty** **3 = Unknown**	**Confidence Score (CS)** **1 = High confidence** **2 = Medium confidence** **3 = Low confidence** **4 = Unknown**		
		Urban	**Rural**		
	b. Record of all building changes by issuing building occupation & completion certificates) : additions, alterations and new construction	b. AS = 2 CS = 3	b. AS = 3 CS = 4	Hard copy for viewing and copying at Municipality	
3	Deeds Office registrations and transfers (monthly)	a. AS = 1 CS = 1	a. AS = 1 CS = 1	Electronic MS excel supplied	
4	Record of all offers received to purchase and to lease Municipal owned properties	a. AS = 2 CS = 3	a. AS = 2 CS = 3	Hard copy for viewing and copying at Municipality	
5	Record of all sales and rental agreements relating to properties sold by the Municipality whether registered or not	a. AS = 1. CS = 2	a. AS = 1 CS = 2	Hard copy for viewing and copying at Municipality	
6	Approved schemes, amendments to schemes and consents in terms of schemes	a. AS = 2. CS = 3	a. AS = 3 CS = 4	Hard copy or electronic database for viewing and copying at Municipality	
7	Records of planning approvals outside the area of a scheme	a. AS = 3 CS = 4	a. AS = 3 CS = 4	Hard copy or electronic database for viewing and copying at Municipality	

NO.	ITEM OF INFORMATION	LEVEL OF AVAILABILITY AND LEVEL OF CONFIDENCE OF DATA		FORMAT OF DATA	ANNUAL AVERAGE COUNT OVER THE LAST THREE (3) YEARS
		Availability Score (AS) **1 = Fully available** **2 = Available with difficulty** **3 = Unknown**	**Confidence Score (CS)** **1 = High confidence** **2 = Medium confidence** **3 = Low confidence** **4 = Unknown**		
		Urban	**Rural**		
8	Records of the subdivision or consolidation of land	a. AS = 2. CS = 2	a. AS = 2 CS = 3	Hard copy or electronic database for viewing and copying at Municipality	
9	Records of the phasing or cancellation of an approved layout plan	a. AS = 3. CS = 4	a. AS = 3 CS = 4	Hard copy or electronic database for viewing and copying at Municipality	
10	Record of properties affected by environmental impact assessments	a. AS = 2. CS = 3	a. AS = 2 CS = 3	Hard copy for viewing and copying at Municipality	
11	a. Record of revenue clearance application forms	a. AS = 1. CS = 2	a. AS = 1 CS = 2	Hard copy for viewing and copying at Municipality	
	b. Record of revenue clearances	a. AS = 1. CS = 2	a. AS = 1 CS = 2	Hard copy for viewing and copying at Municipality	
12	Record of properties that are adversely affected by adverse soil conditions or prohibition on development i.e. land subject to dolomite etc.	a. AS = 3. CS = 4	a. AS = 3 CS = 4	Hard copy for viewing and copying at Municipality	

NO.	ITEM OF INFORMATION	LEVEL OF AVAILABILITY AND LEVEL OF CONFIDENCE OF DATA		FORMAT OF DATA	ANNUAL AVERAGE COUNT OVER THE LAST THREE (3) YEARS
		Availability Score (AS) **1 = Fully available** **2 = Available with difficulty** **3 = Unknown**	**Confidence Score (CS)** **1 = High confidence** **2 = Medium confidence** **3 = Low confidence** **4 = Unknown**		
		Urban	**Rural**		
13	Names and contact details of stakeholders eg Farmers associations, etc	a. AS = 3. CS = 4	a. AS = 3 CS = 4	Harding Farmers Association: Glynn Hogg-0835560651; Harding Business Exco:Colin Davenhill-0765316528	NA
14	Postal addresses for billing	a. AS = 1. CS = 2	a. AS = 2 CS = 3	Billing system extract, other sources, mainly Govt sector	NA
15	GIS cadastral layer of the municipality (property register for valuations)	a. AS = 1. CS = 1	a. AS = 1 CS = 1	GIS cadastral as per property register specifications	NA
16	Aerial photography of municipality	a. AS= 3 CS= 3	a. AS = 3 CS = 3	Must not be older than 1 year prior to date of valuation	NA

ANNEXURE B

ANNEXURE B - AERIAL PHOTOGRAPHY SPECIFICATIONS

The municipality requires imagery to be supplied for the support of the general valuation which will be standard digital aerial imagery (orthophoto mosaics).

Specifications of digital Imagery (Orthophoto Mosaics)

1: Aerial photography must be produced and delivered by the Service Provider in terms of the bid specifications and must include all properties within the municipalities boundary.

2. Imagery must be high resolution, ortho-rectified and geo-referenced.

3. The primary unit of delivery is the applicable municipality over which the imagery will originate.

4. The secondary unit of delivery of the aerial photography is based on the 1:10 000 tiles/ gridblock, similar to the national ortho-photo map series from CDSM, which must be relevant to the applicable municipality.

5. The format in which the images must be delivered is one copy in the Mr. Sid format and one copy in the geotiff format.

6. The storage medium for image supply to the municipality is CD/DVD.

7. The coordinate system is: Geographic, Hartbeeshoek 94 (datum), WGS84 (ellipsoid).

8. The above-mentioned coordinate system must be allocated to each of the images. raster / Arc GIS 10 and later releases must be able to read the allocated coordinates system automatically without any post processing i.e. allocation of coordinate system by the municipality.

9. Accuracy must be at least 1 metre horizontal positional accuracy. (Cadastral data must correlate accurately to the final product.)

10. The pixel size shall not be more than 25 X 25 cm.

11. The Mr Sid compression ratio must be 1:10.

12. All imagery must be cloud free.

13. The naming convention of imagery must be in line with the CDSM 1: 10000 grid based system. i.e. 2830AB_25.

14. Background - no void areas may exist. All 1: 10000 grid blocks overlapping the applicable area of interest must be filled with imagery (this includes grid blocks overlapping adjacent municipalities).

15. Each 1:10000 Imagery tile must overlap the adjacent imagery tiles by at least 200 metres (this includes the outer edges of peripheral tiles of each area of delivery).

16. No duplicate tiles may exist.

17. No tiles may be located outside of its associated 1: 10000 grid block location due to incorrect geo-referencing.

ANNEXURE C

ANNEXURE C - GIS CADASTRAL LAYER SPECIFICATIONS (PROPERTY REGISTER)

1. GENERAL

(1) All coordinate geometry for the farm data will be captured in the Clarke 1880 coordinate system initially as the majority of the farm data is in Clarke 1880. The final data set will be converted to WGS84.

(2) All servitudes are to be captured and provided as a separate data layer. In cases where centre line is depicted, the Service Provider must capture the outer boundaries of the extent of the servitude.

(3) The unique 21 digit key used by the Surveyor General must be created per land parcel and populated into the database,

(4) “Snapping” must be used to capture features as specified and to provide topological connectivity.

(5) Visual checks must be done against compilation plans from the Surveyor General's Office for completeness of data capture.

(6) Automated checks must also be done for data completeness, polygon closure, attribute validity, connectivity to assure the completeness and usability of the data captured.

(7) The ownership data must be acquired for all properties and linked to the cadastral data in order to create the registered layer. Mismatches must be thoroughly investigated in the Surveyor General's Office and Deeds Office and resolved. Ownership data is to be held in a Database, CSV, MS Excel or MS Access to permit data transfer and matching between the valuation roll and the GIS cadastral layer.

2. ATTRIBUTES REQUIRED FOR THE CADASTRAL DATA

The following attributes for the cadastral data are required to be captured:

The structure format and content must also include the data fields in terms of Template “B” of these bid specifications.

The specifications for the Valuation Roll GIS Cadastral Layer contained in Annexure D and template B of the bid specifications are in addition to this specification and must be complied with.

(a) **Property or land parcel (polygon)**

SG_Code	CHAR (21)	Code must be determined using the region code, erf/grant number and portion numbers.
Farm Name & Number	CHAR (30)	Name of the Parent Farm and number. eg. Riverside 12635
Portion Number	INTEGER	Where property is a subdivision, the portion number must be captured.
SG area as per diagram	CHAR (20)	Area on the source document + unit eg. 10 perches
Metric area	LONG INTEGRER	Area in square metres eg. 3654.
Diagram no	CHAR (15)	Diagram or General Plan Number eg. SG125/2000 or SV15F33
Registration Division	CHAR (3)	Registration division of farm. *Eg* 0FT, 0GS
Land Usage	CHAR (50)	eg. StateLand (optional)
User Department	CHAR (50)	eg. DWAF (optional)
Type of usage	CHAR (50)	eg. Dam / forestry (optional)

(b)**Servitude (point, line or polygon)**

Servitude_Type	CHAR (30)	Type of servitude (EPTL, ROW, S&D etc)
Servitude_Width	SINGLE	Full width of servitude
Diagram No	CHAR (15)	Diagram or General Plan Number

3. ACCURACY

(1) An accuracy of 0.3m is to be achieved for coordinate. If errors of more than 0.3m are found these are to be investigated by a professional land surveyor and reported on.

(2) Areas are to be based on the average length of a side multiplied by twice the coordinate accuracy, *eg.* (Polygon Area)- (Diagram Area) <2x (0.3m) x square root of (Diagram Area).

4. PROCEDURE FOR FARM CAPTURING

The original farm boundary coordinates must takes preference over subdivisions, servitudes, leases etc and all straight lines must remain straight. If the difference is more than 0.30m from the straight line it must be queried. By using the list of farms in the Registration Division, the Service Provider must work from the highest farm number down to the lowest, inputting all coordinates, in the following order, from diagrams and General Plans:

(a) **LO co-ordinates**

The most recent survey must be used to input any coordinate. (There can be an allowable difference of 0.30m between surveys of the same beacon and the difference from a straight line of a beacon *i.e*. If the distance is greater than 0.30m from a straight line the beacon remains in its coordinated place but the line is extended to the straight line. Any difference greater than 0.30m must be queried and checked by the nominated GIS / Data Manager).

(b)**Local coordinates (not on LO, usually has no constants)**

The coordinates must be entered therefore the polygon will not fall in the correct area. It is usually swung by 180º (can be 90º) and above the Equator. The Service Provider must select the polygon, rotate it by the required amount, move it near its proper place and then using a Helmert transformation (using 3 or more known LO points) to put into position.

(c) **Sides and angles**

These are to be input by using polars.

(d) **Curvilinear boundaries (rivers, roads, cliff edge etc)**

By using the scanned image of the diagram the Service Provider must digitise rivers. If there are newer surveys coordinate points along the river, these must be added to the continuous map. If this is not stated the middle of the river is taken as the boundary.

(e) **Servitudes (areas, lines and points) (optional)**

All servitudes are to be indicated. If a servitude is shown topographically and a note appears on the diagram this must be shown as well. If a diagram gives the width of the servitude the full extent must be shown on the continuous map.

5. DELIVERABLES GIS CADASTRAL LAYER

The following deliverables must be provided to the Municipality by the Service Provider:

(a) All source data provided to and obtained by the Bidder.
(b) “Approved”, “Registered” and associated cadastral data layers within the definition of “property register” in ESRI ArcView Shapefile or personal geodatabase containing the above layers as feature classes, with point and polygon topology. Data must be in Geographic coordinates on the Hartebeeshoek ’94 datum (WGS84 ellipsoid). The GIS cadastral data must match to the property register (valuation roll) database at a record level.
(c) The property register cadastral layer should be a “wall to wall” representation of the municipality and all spatial properties that are registered in the deeds office should have a corresponding owner name with title deed information.
(d) Relational database in Microsoft access format (.mdb) or a suitable substitute containing all ownership information sourced from the Deed Office.
(e) Ownership information should be in sync with the Valuation Roll GIS cadastral layer.
(f) Anomalies should be flagged in the ownership database with clear comments of the exclusion.
(g) All extent attributes in the ownership database should be in a standard format (Ha, m²).
(h) Ownership information should be attributes of the spatial data and linked to the spatial data via the 21 and 26 digit code.
(i) Clean and free of overshoots, undershoots and duplication. This includes both the point and line coverages.

(j) An accuracy of 0.5% for properties situated in township registered areas and 1% for properties in farm registered areas should be achieved when comparing extents between captured land parcels and extents registered in the Deeds information. Properties falling outside this range should be “flagged” with clear comments for the anomalies.

(k) All spatial information and ownership information needs to be maintained to date of implementation of general valuation for the municipality.

(l) The Valuation Roll GIS cadastral spatial layer representing the valuation roll needs to be officially signed-off by the nominated GIS and Data Manager in terms of the Bid.

6. DATABASE DESIGN - DEEDS INFORMATION

The Service Provider must follow the general deeds office data structure and format when designing their database as following:

Bonds Information

Deeds ID

ERF_NO

TOWNSHIP NAME

PORTION NO

ENDORSEMENT_DOC_NO

ENDORSEMENT HOLDER

SIGN

BOND AMOUNT

MICROFILM YEAR

MICROFILM ROLL

MICROFILM BLIP

MUNIC_CODE

Clearance Information

Deeds ID

ERF_NO

TOWNSHIP NAME

PORTION NO

FARM NAME

REGISTRATION_DIV

CLEARANCE

SITUATED_TOWNSHIP_NAME

SITUATED_ERF_NO

SITUATED_PRTN_NO

MUNIC_CODE

Deeds Information

Deeds ID

ERF_NO

TOWNSHIP NAME

PORTION NO

RESTANT

ADDITIONAL_DESC

DIAGRAM_NO

EXTENT

PROVINCE

MUNIC_CODE

MUNIC_NAME

Historical Information

Deeds ID

ERF_NO

TOWNSHIP_NAME

PORTION_NO

PREVIOUS_TITLE

REGISTRATION_DATE

MICROFILM_REFRENCE

SHARE

PURCHASE_PRICE

NEW_TITLE

MICROFILM_REFRENCE2

PREVIOUS_OWNER

ID_NUMBER

MUNIC_CODE

Owners Information

Deeds ID

ERF_NO

TOWNSHIP_NAME

PORTION_NO

PERSON_NAME

PERSON_ID_NO

DOC_NO

REGISTRATION_DATE

SHARE

PURCHASE_DATE

SIGN

PURCHASE_PRICE

MICROFILM_YEAR

MICROFILM_ROLL

MICROFILM_BLIP

MUNIC_CODE

Property Information

(21digit)

Deeds ID

ERF_NO

TOWNSHIP_NAME

PORTION_NO

DEEDS_OFFICE

PROPERTY_TYPE

LPI_MINOR_KEY

LPI_MAJOR_KEY

REGDIVISION

MUNIC_CODE

ANNEXURE D

ANNEXURE D – MPRA ROLL DATA: DATA TO BE VERIFIED AND / OR COLLECTED

The MPRA and the Bid specifications must be applied in the delivery of this bid. Notwithstanding the application and execution of these bid specifications, the Service Provider must consider revisions and updates to best practice, methods and standards in municipal valuations for property rating.

(a) The Service Provider in implementing the Bid must take account of the requirements of **Annexure "D"** in the creation and maintenance of the Property Register (as defined in the bid specification) and as referenced in the **Templates "A1 – A2", "B", "C" and "D"** of this bid specification, namely –

1) General Valuation (GV) Roll (electronic) GV year **(Template "A1 & A2")** - MPRA VALUATION ROLL REPORT,
2) Consolidated Valuation Roll (CVR) / Supplementary valuation Roll (SV) (electronic) as required **(Template "A1 & A2")** - MPRA VALUATION ROLL,
3) Valuation Roll GIS cadastral layer (ESRI shape file format) GV year and as required **(Template "B")** - Geographic Information Systems (GIS) GIS Attribute Data for the valuation roll,
4) Property data (electronic) GV year and as required **(Template "C")** - Property Attribute Data,
5) General Valuation Sales File (electronic) GV year **(Template "D")** - Sales data file for general valuations part of market reports and sales review/analysis.

(b) The Service Provider in implementing the Bid and a general valuation is required to provide a sketch of each building where NON-CAMA methodology is applied AND a digitised footprint of each building where CAMA methodology is applied which must accompany the data form. The building size (area) must be calculable from the sketch or building footprint and captured in the main property register database housing the property data;

(c) The Service Provider in implementing the Bid must provide a Data collection form which accommodates the data templates for each property valued. This can be provided in electronic or scanned format;

(d) The Service Provider in implementing the Bid must provide a valuation calculation template (electronic) for each property valued individually (ie valued by NON-CAMA mzethodology);

(e) The Service Provider in implementing the Bid must provide All data collected and captured which must be exportable / extractable in a flat file format in csv, spreadsheet or in a database format from the valuation roll management system (VRMS) or the approved software (eg Microsoft, ESRI shape file etc) and in accordance with the Bid Specifications;

(f) The Service Provider in implementing the Bid must provide a cadastral site plan with aerial photography underlay which must accompany the data collection form.

1. AGRICULTURAL PROPERTY

"Agricultural property" - means property that is used primarily for agricultural purposes but, without derogating from section 9, excludes any portion thereof that is used commercially for the hospitality of guests, and excludes the use of the property for the purpose of eco-tourism or for the trading in or hunting of game.

In addition to the MPRA definition the following practice notes below must be considered –

(1) Agricultural property is generally property used in the production of crops, livestock or other generally recognised agricultural activities, together with those buildings which are also generally considered necessary for these agricultural activities and;

(2) Agricultural property includes any vacant land outside the area of a scheme for which no development rights have been granted in terms of any planning law, provided that;

> (i) where the agricultural property or portions thereof are used for other purposes, those portions should be identified and valued on their actual use (eg. Industrial) according to the Municipality's adopted categories of property and valued and rated separately in terms of "**multiple purpose property**" section 9(1)(c) and 9(2) of the MPRA.

(3) The agricultural guidelines as endorsed by the profession in terms of Annexure "I" must be applied as best practice in the valuation process.

(4) Agricultural property must be valued individually by a registered Valuer suitably experienced in such valuations.

2. INCOME PRODUCING PROPERTY

(1) "**income producing property**" means commercial and industrial property that is not of a specialised nature.

(2) For sectional title non-residential property, the data collected must be related to the valuation type either direct sales, income approach or both and must also include the sectional title data.

(3) Income producing properties must be valued by either CAMA techniques or individually as approved by the municipal valuer. Where a property is valued individually a separate valuation template must be prepared and submitted for the applicable valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

(4) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

3. MINING PROPERTY

(1) "**mining property**" means property as contemplated in the Mineral and Petroleum Resources Development Act, 2002 (Act No. 28 of 2002).

(2) Mining property is classified as a specialised property and must be valued individually by a registered Valuer suitably experienced in such valuations.

(3) A fully motivated valuation report must be prepared and delivered for each mining property valued.

(4) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

4. PROPERTY USED FOR MULTIPLE PURPOSES

(1) **"multiple purposes"**, in relation to a property, means the use of a property for more than one purpose, subject to section 9. At a property level this section provides for a category assigned to the dominant use of the property or a multiple purpose category where the values are apportioned based on their individual categories and rates levies accordingly.

(2) The data that must be collected for property used for more than one purpose will depend on the Municipality's rates policy and the type of property being valued.

(3) The Value of property used for more than one purpose may require values to be apportioned if s9 (1) (b) multiple purpose category is adopted by the municipality in its rates policy and read with s9 (2).

(4) Properties under this category must be valued in terms of the applicable methodology of the property use and valued by either CAMA techniques or individually as approved by the municipal valuer. Where a property is valued individually a separate valuation template must be prepared and submitted for the applicable valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

(5) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

5. PUBLIC SERVICE INFRASTRUCTURE (PSI)

In the preparation of the property register and the valuation of PSI, the municipal valuer must take account of the rates policy of the municipality and the MPRA with reference to the Section 30 and Section 7 to assess whether PSI will be rated and valued. In terms of MPRA amendments effective from 1 July 2015 certain PSI is no longer rateable however where it exists for rating the municipality must phase in the prohibition of rating over a five year period.

(1) **"public service infrastructure"** means publicly controlled infrastructure of the following kinds:

> (a) national, provincial or other public roads on which goods, services or labour move across a municipal boundary;

(b) water or sewer pipes, ducts or other conduits, dams, water supply reservoirs, water treatment plants or water pumps forming part of a water or sewer scheme serving the public;

(c) power stations, power substations or power lines forming part of an electricity scheme serving the public;

(d) gas or liquid fuel plants or refineries or pipelines for gas or liquid fuels, forming part of a scheme for transporting such fuels;

(e) railway lines forming part of a national railway system;

(f) communication towers, masts, exchanges or lines forming part of a communications system serving the public;

(g) runways or aprons and the air traffic control unit at national or provincial airports, including the vacant land known as the obstacle free zone surrounding these, which must be vacant for the air navigation purposes; (Amended by s1 of Act 29 of 2014);

(h) breakwaters, sea walls, channels, basins, quay walls, jetties, roads, railway or infrastructure used for the provision of water, lights, power, sewerage or similar services of ports, or navigational aids comprising lighthouses, radio navigational aids, buoys, beacons or any other device or system used to assist the safe and efficient navigation of vessels; communications system serving the public;

(i) any other publicly controlled infrastructure as may be prescribed; or

(j) a right registered against immovable property (Added and deleted by s24 of Act 19 of 2008) in connection with infrastructure mentioned in paragraphs (a) to (i);

(2) The Service Provider must ensure that Public Service Infrastructure (PSI) is identified, spatially represented and valued.

(3) PSI is identified mainly by type and ownership and all PSI should be depicted under each respective ownership group within the PSI category in the Valuation Roll.

(4) Equipment and machinery as well as moveable property should not be valued.

(5) For the updating and preparation of the valuation roll (property register) the following are regarded as the primary **PSI Owner Types / Groupings** –

(a) South African National Road Agency

(b) KZNPA

(c) Department of Water Affairs

(d) Eskom

(e) Telkom

(f) Sentech/SABC

(g) Transnet

(6) Guideline Prescribed methodology for PSI

(a) South African National Road Agency

(i) National Routes

- Identify in the Valuation Roll by property description
- Retain office record of underlying Erven
- Value property by reference to surrounding usage/s
- Any property which is excess to road requirements and forms an economically viable property should not be treated as PSI but separately valued and entered into the Valuation Roll.

(b) Department of Transport

(i) Provincial Roads

- Identify in the Valuation Roll by property description
- Retain office record of underlying Erven
- Value property by reference to surrounding usage/s
- Any property which is excess to road requirements and forms an economically viable property should not be treated as PSI but separately valued and entered into the Valuation Roll.

(c) Department of Water Affairs

(i) Pipelines

- Identify in the Valuation Roll by property description
- Obtain extent of servitude for valuation purposes by multiplying the servitude length by its width.
- Value servitude by reference to overlying land

(ii) Treatment Works, etc.

- Identify in Valuation Roll by cadastral description
- Value property by reference to surrounding usages

(d) Eskom

(i) Power Lines

- Identify in the Valuation Roll by property description
- Obtain extent of servitude for valuation purposes by multiplying the servitude length by its width. In instances where servitudes are registered in general terms the extent thereof must be estimated.
- Value servitude by reference to underlying land.

(e) Telkom

(i) Telephone Exchanges

- Identify in Valuation Roll by cadastral description
- Value land and economically relevant buildings as appropriate

(ii) Transmission Towers

- Identify in Valuation Roll by cadastral description
- Land valued appropriately

(f) Sentech/SABC

(i) Transmission Masts

- Identify in Valuation Roll by cadastral description
- Land valued appropriately

(g) Transnet

(i) Oil, Gas and Multipurpose Pipelines

- Identify in the Valuation Roll by property description
- Obtain extent of servitude for valuation purposes by multiplying the servitude length by its width.

- Value servitude by reference to overlying land

(h) Railway Lines

(i) PSI comprises those lines between stations

- Identify in the Valuation Roll by property description
- Retain office record of underlying Erven
- Value land by reference to surrounding usage/s
- Any land which is excess to rail requirements and forms an economically viable property should not be treated as PSI but separately valued and entered into the Valuation Roll.
- Stations and marshalling yards are not PSI and should be separately valued and entered into the Valuation Roll

7. The Municipal Valuer should endeavour to utilise the current asset registers available from the various agencies towards the determination of the market value of the PSI properties.

6. REGISTERED RIGHTS IN PROPERTY

A right registered against immovable property as defined in the MPRA must be valued considering the actual use of the property and data collected according to its use with reference to best practice and the applicable “standard”.

7. RESIDENTIAL PROPERTY

(1) "**residential property**" means a typical single residential property.

(2) The typical single residential property must be valued by CAMA techniques however if not suitable for CAMA application then must be valued individually as approved by the municipal valuer. Where a property is valued individually a separate valuation template must be prepared and submitted for the applicable valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

(3) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

8. RESIDENTIAL SECTIONAL TITLE PROPERTY

(1) "**residential sectional title property"** means any residential development which forms part of a sectional title scheme as contemplated in section 12 of the Sectional Titles Act, 1986 (Act No. 95 of 1986).

(2) The residential sectional title property must be valued by CAMA techniques however if not suitable for CAMA application then must be valued individually as approved by the municipal valuer.

Where a property is valued individually a separate valuation template must be prepared and submitted for the applicable valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

(3) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

9. COMMUNAL PROPERTY

(1) In the case of Ingonyama Trust Board property, State Trust Land and similarly defined property, the valuer must follow the Communal Property Rating and Valuation Guidelines referenced as Annexure J and the adopted rates policy of municipality for property use for more than one purpose.

(2) Communal property must be valued considering the actual use of the property and data collected according to its use with reference to best practice and the bid specifications.

(3) Specialised (NON-CAMA) property identified by the municipal valuer as specialised property must be valued individually by a registered Valuer suitably experienced in such valuations. Where a property is valued individually a separate valuation template must be prepared and submitted for the applicable valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

(4) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

10. SPECIALISED PROPERTY

(1) "**specialised property"** means property which is not readily sold in the open market, and may include hospitals, city hall, heavy industry, airports etc.

(2) Specialised property identified by the municipal valuer as specialised property must be valued individually by a registered Valuer suitably experienced in such valuations. Where a property is valued individually a separate valuation template must be prepared and submitted for the applicable valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

(3) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

11. VACANT LAND

(1) "**vacant land**" means any unimproved vacant land, which is not agricultural property.

(2) Any vacant land outside the area of a scheme for which no development rights have been granted in terms of any planning law and no potential exists for a higher order use exists, must be considered as agricultural land and valued accordingly.

(3) The value of vacant land must reflect –

(a) the highest use permitted by the scheme, including any consent granted in terms thereof, if the land is situated in the area of a scheme; or

(b) the highest use permitted in terms of a development approval, if the land does not form part of the area of a scheme, but development rights have been granted in respect of the land.

(4) In cases of specialised and complex vacant land as identified by the municipal valuer these must be valued individually. Where a property is valued individually a separate valuation template must be prepared and submitted for the applicable valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

(5) To apply the bid specifications and best practice to support the valuation in terms of the MPRA.

ANNEXURE D – (Template "A-1")
MPRA VALUATION ROLL
REPORT

Template "A-1"

MPRA VALUATION ROLL REPORT

(s23 Register of properties - Part "A" of the valuation roll)

The following minimum data are required to be maintained on the valuation roll for MPRA extracts and reporting

Description	Short name	Field Format	Data Comment	Extract Ref	Responsibility
ID_PIN	ID_PIN	Text/Num	System No.	ROLL	MV
Municipality ID Number	Mun_ID	Text/Num	The municipal identity code allocated to a municipality	ROLL-RATES	Municipal Valuer
Name of Municipality	Mun_Name	Text/Num	Name of Municipality	ROLL-RATES	Municipal Valuer
Rates Account Number	RTS_ACC	Text/Num	Sourced from Financial Management System for rates. Controls in terms of the MPRA s27 Accounts to be furnished / MFMA. Note some financial systems change rate accounts when there is a transfer or a new ratapayer so may need updating to the roll.	RATES (s27 / MFMA)	Municipality
SG21 Code	SG21	Text	Main parent Surveyor General (SG) Code is a Unique Property Identifier (UPI) derived from property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property.	ROLL & PUBLISH (REGS)	Municipal Valuer
SG21_26 Code	SGP21_26	Text	Surveyor General (SG) Code is a unique property identifier derived from the property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property and to extend the SG Code for tenure types for MPRA definition of property by adding 5 suffixed digits to create a 26 digit code. See Tenure Type (TT)	ROLL-RATES & PUBLISH (REGS)	Municipal Valuer
SG Holding_Unity	SGH	Text/Num	Surveyor General Code is a unique property identifier derived from the property description, used as the data link field when valuing a grouping of properties which are contiguous and have the same owner and category of property. The combined value of the grouping of properties is shown on the one parent property and the linked holding records will have a zero value. This enables ease of searching and identifying the grouped and valued properties. AKA Unity of Use.	ROLL-RATES & PUBLISH (REGS)	Municipal Valuer
Tenure Type	TT	Text	In accordance with the MPRA, definition of property and roll tenure type. FT= Full Title (Deeds Registered), FTPR = Parent Remainder, ST= Sectional Title (Deeds Registered), FTST = Full Title Sectional Title, RR= Registered Rights, registered leases / rights (Deeds Registered), LTR= Land Tenure Rights (MPRA), PSI= Public Service Infrastructure (MPRA), MP = Multiple Purpose Use (MPRA), UND = Undefined (MPRA). Every property on the roll must have a Tenure Type assigned.	ROLL & PUBLISH (MPRA/REGS)	Municipal Valuer
Geographical area (Suburb)	GA	Text / Num	Based on Suburb collected and captured by Municipal Valuer. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL & PUBLISH (s48 / REGS)	Municipal Valuer
REM	REM	Text	Remainder registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
ERF	ERF	Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
PTN	PTN	Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Town name	TN	Text / Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Farm name	FN	Text / Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Unit Section Number	UNIT	Num	Sectional Title Deeds Office description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Scheme Name	SNME	Text / Num	Sectional Title Deeds Office description / Surveyor General Sectional Title Plan. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Scheme Number_Year	SNUM_YEAR	Text / Num	Sectional Title Deeds Office description / Surveyor General Sectional Title Plan. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL & PUBLISH (s48 / REGS)	Municipal Valuer
Owner	OWN	Text / Num	Deeds Office OR MPRA definition of owner. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Category of Property (Code)	COP_CDE	Text / Num	Category used for rating in terms of s8. Reference Rates Policy, Data Collection and Regulations Gaz 29304, Roll Format / Content. Published Category for General (GV) Valuation Roll.	ROLL-RATES & PUBLISH - GV (s48 / REGS)	Municipal Valuer
Category of Property Description	COP_DESC	Text / Num	Category used for rating in terms of s8. Reference Rates Policy, Data Collection and Regulations Gaz 29304, Roll Format / Content. Published Category for General Valuation (GV) Roll.	ROLL-RATES & PUBLISH - GV (s48 / REGS)	Municipal Valuer

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Template "A-1"

MPRA VALUATION ROLL REPORT

(s23 Register of properties - Part "A" of the valuation roll)

The following minimum data are required to be maintained on the valuation roll for MPRA extracts and reporting

Description	Short name	Field Format	Data Comment	Extract Ref	Responsibility
Actual Use (Primary Use) Code	USE_CDE	Text / Num	Actual use with reference to the MPRA s8 (1) part of data collection to support valuations	ROLL (s8 / s9)	Municipal Valuer
Actual Use (Primary Use) Description	USE_DESC	Text / Num	Actual use with reference to the MPRA s8 (1) part of data collection to support valuations	ROLL (s8 /s9)	Municipal Valuer
Physical Address of the Property	ADD	Text / Num	MPRA and Regulations Gaz 29304	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Extent (Land_Unit) m²	EXT	Num	MPRA and Regulations Gaz 29304. Land extent or sectional title unit extent	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Market Value (R)	MV	Num	MPRA and Regulations Gaz 29304. Market value of the property at date of roll report	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Reason for Supplementary valuation roll (S78 SVR)	SV Reason	Text / Num	MPRA Regulations Gaz 29304; s78 (1) supplementary valuation roll (SVR) or objections and appeals s55. (s78.1 - a to h) OR whether an objection or appeal decision (s55)	SV ROLL-RATES & PUBLISH - SV (s78)	Municipal Valuer
Supplementary Valuation Effective Date	SV_EFF_DATE	Date	MPRA Regulations Gaz 29304; s78 (4) effective date of the supplementary valuation roll (SVR) or objections and appeals s55. (s78.4 - a to h) OR the effective date of the objection / appeal decision (s55)	ROLL-RATES (s78)	Municipal Valuer
Valuation Roll Type	VR TYPE	Text / Num	Report Options 1. General Valuation (GV) Roll (Draft-Final); 2. Supplementary Valuation (SV) Roll; 3. Consolidated / Amended Valuation Roll To support management and tracking of MPRA implementation	ROLL	Municipal Valuer
Valuation Roll Number	VR NUM	Num	The sequential number of rolls produced - GV OR SV	ROLL	Municipal Valuer
Valuation Roll Year	VR YEAR	Num	The Municipal Financial year in which the GV Roll was implemented. Financial Year 2019/2020 (1 July to 30 June) GV Valuation Roll Year = 2019. In this example if an SV Roll is implemented / published during the financial year ie between 1 July 2019 and 30 June 2020 then the SV Valuation Roll Year = 2019	ROLL	Municipal Valuer
Multiple owner Indicator (Y_N)	MULTI_OWN	Text	Deeds Office information, indicator if there is more than one registered owner	ROLL	Municipal Valuer
Rebate	REBATE	Yes/No	In terms of the MPRA - yes or no / true or false status	ROLL-RATES	Municipal Valuer
Phase in	PH_IN	Yes/No	In terms of the MPRA - yes or no / true or false status	ROLL-RATES	Municipal Valuer
Exemption	EXMP	Yes/No	In terms of the MPRA - yes or no / true or false status	ROLL-RATES	Municipal Valuer
Exclusion	EXCL	Yes/No	In terms of the MPRA - yes or no / true or false status	ROLL-RATES	Municipal Valuer
Section 78.5 Notice Indicator (Y_N)	s78.5	Date	In terms of MPRA section 78 (5). Notice to be served and issued to the owner for each supplementary roll update. Provide the date that the s78 (5) notice was served and issued	ROLL-RATES	Municipal Valuer
Postal Address 1	POSADD	Text/Num	Other Particulars In terms of the MPRA and regulations. Additional Fields (Columns) of data can be provided.	ROLL-RATES	MUN-MV
Building Name	BLDNME	Text/Num	Other Particulars In terms of the MPRA and regulations. Additional Fields (Columns) of data can be provided.	ROLL	Municipal Valuer
Latitute GPS coordinate	LAT	Text/Num	Latitude and longitude, coordinate system to determine a locational point on the Earth's surface using GPS - "Global Positioning System". To be created and captured for specific buildings which are difficult to locate.	GPS Coordinate System	Municipal Valuer
Longitude GPS coordinate	LONG	Text/Num	Latitude and longitude, coordinate system to determine a locational point on the Earth's surface using GPS - "Global Positioning System". To be created and captured for specific buildings which are difficult to locate.	GPS Coordinate System	Municipal Valuer
Department Primary Owner	PRIM_DEPT	Text/Num	To support Government owned and responsible departments. Primary Owner issued by the responsible department and which resides on their asset register.	GOV FAR-ROLL	Gov Department
Department Secondary Owner	SEC_DEPT	Text/Num	To support Government owned and responsible departments. Secondary Owner issued by the responsible department and which resides on their asset register.	GOV FAR-ROLL	Gov Department
Department Asset Number	ASSET_NO	Text/Num	The asset number issued by the responsible department and which resides on their asset register. Is the Faciity ID Number	GOV FAR-ROLL	Gov Department
Other Particulars1	OTP1	Text/Num	Other Particulars In terms of the MPRA and regulations. Additional Fields (Columns) of data can be provided. Can be extended as required.	ROLL	Municipal Valuer

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ANNEXURE D – (Template "A-2")

MPRA VALUATION ROLL

SUMMARY REPORT

Template "A2"

Insert Date of Report

VALUATION ROLL SUMMARY
(s23 - Part A of the Property Register)

Category of Property (Code)	Category of Property (Description)	Roll Count	Total Roll Extent (m^2)	Total Roll Value (R)
RES	Residential Properties			
IND	Industrial Properties			
BC	Business and Commercial Properties			
AG	Agricultural Properties			
MIN	Mining Properties			
PSP	Public Service Purpose Properties			
PBO	Public Benefit Organisation Properties			
TOTALS		**0**	**0**	**0**

Note

1. Categories and codes quoted are examples only and final categories of property must be aligned to Section 8 of the MPRA
2. To be read with Template "A1" and must be a summary of template "A1" report

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ANNEXURE D – (Template "B")
VALUATION ROLL GIS
CADASTRAL LAYER

Template "B"

Geographic Information Systems (GIS)
Valuation Roll GIS Cadastral Layer - Shape File with Attribute Data

The following minimum data are required to be maintained on the valuation roll GIS cadastral layer
(GIS attributes table with associated shape file to be provided)
Municipal Valuer responsible and accountable for the valuation roll GIS cadastral layer

Description GIS Attributes table	Short Name	Field Format	Comment	Extract Ref	Responsibility
ID_PIN	ID_PIN	Text/Num	System No.	ROLL	MV
Municipality ID Number	Mun_ID	Text/Num	The municipal identity code allocated to a municipality	Roll	Municipal Valuer
Name of Municipality	Mun_Name	Text/Num	Name of Municipality	Roll	Municipal Valuer
Rates Account Number	RTS_ACC	Text/Num	Sourced from Financial Management System for rates. Controls in terms of the MPRA s27 Accounts to be furnished / MFMA. Note some financial systems change rate accounts when there is a transfer or a new ratapayer so may need updating to the roll.	RATES (s27 / MFMA)	Municipality
SG21 Code	SG21	Text	Main parent Surveyor General (SG) Code is a Unique Property Identifier (UPI) derived from property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property.	ROLL & PUBLISH (REGS)	Municipal Valuer
SG21_26 Code	SGP21_26	Text	Surveyor General (SG) Code is a unique property identifier derived from the property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property and to extend the SG Code for tenure types for MPRA definition of property by adding 5 suffixed digits to create a 26 digit code. See Tenure Type (TT)	ROLL-RATES & PUBLISH (REGS)	Municipal Valuer
SG Holding_Unity	SGH	Text/Num	Surveyor General Code is a unique property identifier derived from the property description, used as the data link field when valuing a grouping of properties which are contiguous and have the same owner and category of property. The combined value of the grouping of properties is shown on the one parent property and the linked holding records will have a zero value. This enables ease of searching and identifying the grouped and valued properties. AKA Unity of Use.	ROLL-RATES & PUBLISH (REGS)	Municipal Valuer
Tenure Type	TT	Text	In accordance with the MPRA, definition of property and roll tenure type. FT= Full Title (Deeds Registered), FTPR = Parent Remainder, ST= Sectional Title (Deeds Registered), FTST = Sectional Title Parent, RR= Registered Rights, registered leases / rights (Deeds Registered), LTR= Land Tenure Rights (MPRA), PSI= Public Service Infrastructure (MPRA), MP = Multiple Purpose Use (MPRA), UND = Undefined (MPRA). Every property on the roll must have a Tenure Type assigned.	ROLL & PUBLISH (MPRA/REGS)	Municipal Valuer
Geographical area (Suburb)	GA	Text / Num	Based on Suburb collected and captured by Municipal Valuer. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL & PUBLISH (s48 / REGS)	Municipal Valuer
REM	REM	Text	Remainder registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
ERF	ERF	Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
PTN	PTN	Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Town name	TN	Text / Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Farm name	FN	Text / Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer

Template "B"

Geographic Information Systems (GIS)
Valuation Roll GIS Cadastral Layer - Shape File with Attribute Data

The following minimum data are required to be maintained on the valuation roll GIS cadastral layer
(GIS attributes table with associated shape file to be provided)
Municipal Valuer responsible and accountable for the valuation roll GIS cadastral layer

Description GIS Attributes table	Short Name	Field Format	Comment	Extract Ref	Responsibility
Unit Section Number	UNIT	Num	Sectional Title Deeds Office description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Scheme Name	SNME	Text / Num	Sectional Title Deeds Office description / Surveyor General Sectional Title Plan. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Scheme Number_Year	SNUM_YEAR	Text / Num	Sectional Title Deeds Office description / Surveyor General Sectional Title Plan. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL & PUBLISH (s48 / REGS)	Municipal Valuer
Owner	OWN	Text / Num	Deeds Office OR MPRA definition of owner. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Category of Property (Code)	COP_CDE	Text / Num	Category used for rating in terms of s8. Reference Rates Policy, Data Collection and Regulations Gaz 29304, Roll Format / Content. Published Category for General (GV) Valuation Roll.	ROLL-RATES & PUBLISH - GV (s48 / REGS)	Municipal Valuer
Category of Property Description	COP_DESC	Text / Num	Category used for rating in terms of s8. Reference Rates Policy, Data Collection and Regulations Gaz 29304, Roll Format / Content. Published Category for General Valuation (GV) Roll.	ROLL-RATES & PUBLISH -GV (s48 / REGS)	Municipal Valuer
Actual Use (Primary Use) Code	USE_CDE	Text / Num	Actual use with reference to the MPRA s8 (1) part of data collection to support valuations	ROLL (s8 / s9)	Municipal Valuer
Actual Use (Primary Use) Description	USE_DESC	Text / Num	Actual use with reference to the MPRA s8 (1) part of data collection to support valuations	ROLL (s8 /s9)	Municipal Valuer
Physical Address of the Property	ADD	Text / Num	MPRA and Regulations Gaz 29304	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Extent (Land_Unit) m²	EXT	Num	MPRA and Regulations Gaz 29304. Land extent or sectional title unit extent	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Extent (Land) m² (GIS)	EXTGIS	Num	GIS calculated - in square metres	GIS	Municipal Valuer
Extent diff between Deeds and GIS	EXTDIFF	Num	Calculation - in square metres	GIS	Municipal Valuer
SG Diagram Number	SGNUM	Text / Num	Surveyor General Diagram (Plan) - where available	SG	Municipal Valuer
Title Deed Number	TDNUM	Text / Num	Deeds Office data (Latest record)	Deed	Municipal Valuer
Date of Registration	DOR	Date	Deeds Office data (Latest record)	Deed	Municipal Valuer
Date of Sale	DOS	Date	Deeds Office data (Latest record)	Deed	Municipal Valuer
Sale Price	SP	Num	Deeds Office data (Latest record) - in number format	Deed	Municipal Valuer
Status (Registered / Unregistered)	REG_UN	Text	To reflect record on the GIS as registered in the deeds office or is a valid unregistered rateable roll record. (Registered, SG Approved OR Un-registered)	GIS	Municipal Valuer
Scheme Name	SNME	Text / Num	Sectional Title Deeds Office description / Surveyor General Sectional Title Plan. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL & PUBLISH (s48 / REGS)	Municipal Valuer

ANNEXURE D – (Template "C")
MPRA PROPERTY ATTRIBUTE DATA

Template "C" PROPERTY DATA BY PROPERTY TYPE

The following data are required to be collected and captured for periodic reporting and data extraction on the valuation roll.
Municipal valuer is responsible and accountable for all data on the valuation roll.

#	PROPERTY DATA: DATA FIELDS REQUIRED FOR THE VALUATION ROLL MANAGEMENT SYSTEM FOR EACH ROLL RECORD ACCORDING TO THE PROPERTY USE TYPE	COMMENT: EXPLANATION OF DATA REQUIREMENTS FOR THE VALUATION ROLL MANAGEMENT SYSTEM. (READ WITH PROPERTY DATA FIELDS). The VRMS must store the history of all data uPdates for audit purposes. Data extracts and reporting in terms of this template is for current data.
1	**Administrative data**	
2	ID_PIN	System No.
3	Municipality ID Number	The municipal identity code allocated to a municipality
4	Name of Municipality	Name of Municipality
5	Rates Account Number	Sourced from Financial Management System for rates. Controls in terms of the MPRA s27 Accounts to be furnished / MFMA. Note some financial systems change rate accounts when there is a transfer or a new ratapayer so may need updating to the roll.
6	SG21 Code	Main parent Surveyor General (SG) Code is a Unique Property Identifier (UPI) derived from property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property.
7	SG21_26 Code	Surveyor General (SG) Code is a unique property identifier derived from the property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property and to extend the SG Code for tenure types for MPRA definition of property by adding 5 suffixed digits to create a 26 digit code. See Tenure Type (TT)
8	SG Holding_Unity	Surveyor General Code is a unique property identifier derived from the property description, used as the data link field when valuing a grouping of properties which are contiguous and have the same owner and category of property. The combined value of the grouping of properties is shown on the one parent property and the linked holding records will have a zero value. This enables ease of searching and identifying the grouped and valued properties. AKA Unity of Use.
9	Tenure Type	In accordance with the MPRA, definition of property and roll tenure type. FT= Full Title (Deeds Registered), FTPR = Parent Remainder, ST= Sectional Title (Deeds Registered), FTST = Full Title Sectional Title Scheme, RR= Registered Rights (Registered leases / rights), LTR= Land Tenure Rights (MPRA), PSI= Public Service Infrastructure (MPRA), MP = Multiple Purpose Use (MPRA), UND = Undefined (MPRA). Every property on the roll must have a Tenure Type assigned.
10	**Inspection - Data review**	
11	Data Collection Type	(1) Data Collection; (2) Sales Review; (3) Valuation Review; (4) Investigation
12	Inspection/Review Date	Date of Inspection / Review, aligned to access codes
13	Method of Building Area determination	Method of area determination to be provided to support QA - (1) Area by inspection / building plans (2) Area by estimation (digitised - aerials/oblique imagery) (3) Area by owner (4) Area inherited (take on)
14	Access code	Recommend that inspection for new improvements and any major alterations / developments with access codes captured. Access codes - (1) Full access (exterior of buildings on site), (2) External, (3) No Access, (4) Entrance, (5) Owner / Not inspected (data deemed sufficient for valuation)
15	Overall data confidence	To provide the overall level of confidence in the property data to perform credible valuations - (1) Good. (2) Acceptable. (3) Poor / Unknown
16	**Methodology**	
17	Neighbourhood (NBHD) / Market Area (MA)	Neighbourhood (NBHD), also known as Homogeneous Area (HA) to be assigned to property mainly for CAMA application in stratification and model building. The intention though is for all properties to have an NBHD assigned for geographic identification as well.

Template "C"

PROPERTY DATA BY PROPERTY TYPE

The following data are required to be collected and captured for periodic reporting and data extraction on the valuation roll.
Municipal valuer is responsible and accountable for all data on the valuation roll.

#	PROPERTY DATA: DATA FIELDS REQUIRED FOR THE VALUATION ROLL MANAGEMENT SYSTEM FOR EACH ROLL RECORD ACCORDING TO THE PROPERTY USE TYPE	COMMENT: EXPLANATION OF DATA REQUIREMENTS FOR THE VALUATION ROLL MANAGEMENT SYSTEM. (READ WITH PROPERTY DATA FIELDS). The VRMS must store the history of all data uPdates for audit purposes. Data extracts and reporting in terms of this template is for current data.
18	CAMA Applicability (CAMA or Non-CAMA)	CAMA = Y / Non-CAMA = N. This depends on the type of property and the availability / consistency of sales and market data. The Non-CAMA approach is where a property cannot be valued using the CAMA approach and will therefore be valued individually. May be in cases of large tracts of land which are specialised or where no land sales are available eg in a CBD the township development approach or the land residual method may be applicable. In small jurisdictions or limited market evidence a property may be valued individually (Non-CAMA) provided the relevant evidence and valuation templates are provided for each property in accordance with specifications and standards.
19	Method of valuation	Method applied - (1) Sales; (2) Income (3) Cost (4) Township development (5) Residual (6) Profits and Accounts (7) Other
20	Valuation Standard applicable	Standard Applied - (1) SA sMVPR - Municipal Valuations Mass Appraisal Standards; (2) IVS - International Valuation Standards (3) Other. To note that the specifications are applicable for all systems, data management and reporting on a property register / valuation roll.
21	**Property Category-Use**	
22	Primary (Dominant) actual use of property	Actual use code and description by valuer - look to standardise. AGRIC - Note: Use identified by aerial photo support. An experienced eye can distinguish different uses of farm buildings fairly accurately. Homesteads, garaging, pigstyes, shedding dairies, pumphouses etc are recognisable from imagery.
23	Category of Property (Code)	Insert Category Code. Is there a possibility of standardising across municipalities?
24	Category of Property (Description)	Insert Category Description. Consider standard categories across municipalities where applicable
25	Zoning of Property (if available)	Zoning is not often available so practice is not able to collect all consistently. Agreed that for vacant land to attempt to source and capture - value based on highest and best use zoning
26	**Land Data**	
27	Land Extent (m^2) Registered	Source from the Deeds office or SG diagram whichever is deemed more correct. The registered land extent can also be verified by referring to the title deed documents. If the property is an unregistered land parcel (Leased, Registered Right, Land Tenure Right or PSI then to provide land extent from the GIS cadastral determined.
28	Land Extent (m^2) Registered Rights	Based on referenced to ST Scheme rules / sale agreements / Deecs Office records. To rate the registered right, the owner is usually the original developer. Capture either is an extent or a number of units depending on valuation method applied.
29	Land Extent (m^2) Land Tenure Rights	Land extent estimated for land tenture rights - from the GIS cadastral data
30	Land Extent (m^2) PSI	Land extent estimated for PSI - from the GIS cadastral data
31	Land Extent (m^2) Surplus developable land / Bulk	Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. To consider apportionment of value and rates in terms of section 9 of the MPRA where rating category is different from primary use
32	Location	Location indicator. (1) Excellent; (2) Good; (3) Average; (4) Poor
33	View	(1) Sea; (2) Partial sea; (3) Panaramic; (4) Surrounds; (5) Industrial; (6) Commercial; (7) Informal settlements; (8) River-Lake
34	Security	(1) High; (2) Medium; (3) Low; (4) None
35	External Noise	(1) Highway; (2) Major Road; (3) Side Street; (4) Cul De Sac; (5) Entertainment
36	Topography	(1) Level; (2) Average slope; (3) Steep
37	Soil Conditions (if available)	Mainly to support vacant land valuations.

Template "C"

PROPERTY DATA BY PROPERTY TYPE

The following data are required to be collected and captured for periodic reporting and data extraction on the valuation roll.
Municipal valuer is responsible and accountable for all data on the valuation roll.

#	PROPERTY DATA: DATA FIELDS REQUIRED FOR THE VALUATION ROLL MANAGEMENT SYSTEM FOR EACH ROLL RECORD ACCORDING TO THE PROPERTY USE TYPE	COMMENT: EXPLANATION OF DATA REQUIREMENTS FOR THE VALUATION ROLL MANAGEMENT SYSTEM. (READ WITH PROPERTY DATA FIELDS). The VRMS must store the history of all data uPdates for audit purposes. Data extracts and reporting in terms of this template is for current data.
38	Land Value Estimate (Cost approach)	Land Value estimate to support the cost approach
39	**Building Data**	
40	Building Name	Names of prominent buildings to be collected such as names of schools / police stations etc
41	Year Built (approximate)	Based on building plans, occupation dates or observed age for "YEAR BUILT"estimation
42	Quality or grade of building/s rating overall	# Residential - (1) Excellent; (2) Good; (3) Average; (4) Fair; (5) Poor # Commercial / Industrial to apply standard acceptable industry grading norms # Specialised to apply industry grading norms
43	Condition of Property and Buildings overall	(1) Excellent; (2) Good; (3) Average; (4) Fair; (5) Poor
44	Exterior Walls	(1) Brick/Plaster; (2) Face Brick; (3) Concrete Block; (4) Stone; (5) Timber; (6) Iron Clad
45	Number of Storeys	Number of storeys. For more than one building indicate for primary building
46	Number of Houses / Units / Rooms	Refers to quantity of units
47	Gross Building Area (GBA)	Total of all building areas. Method of area determination to be provided to support QA.
48	Total Living Area (Residential)	TLA Area. Refers to residential housing main residential areas (excludes carports, verandahs, balconies). Method of area determination to be provided to support QA.
49	Garage area	Building Area. Method of area determination to be provided to support QA.
50	Granny Flat area	Building Area. Method of area determination to be provided to support QA.
51	Staff Quarters	Building Area. Method of area determination to be provided to support QA.
52	Carport area	Building Area. Method of area determination to be provided to support QA.
53	Outbuildings (1, 2, 3 ...)	Building Area. Outbuilding for sheds and miscellaneous structures. Method of area determination to be provided to support QA. Additional buildings must be added as separate fields in the VRMS
54	Swimming Pool	Indicate Yes / No
55	Tennis Court	Record number of tennis courts
56	Eaves Height of Primary Industrial Building (approximate)	Height of eaves, typically for industrial type structures. Where there is more than one buildings, capture primary building eaves height
57	PFS Forecourt area	Area. Method of area determination to be provided to support QA.
58	Sports Fields area	Extent - Applicable to educational and sporting environment
59	Sports Centre / Pavilion (Indoor) area	Extent - Applicable to educational and sporting environment
60	Sports facilities (Tennis/ Hockey / Gyms) area	Extent - Applicable to educational and sporting environment
61	**Sectional Title (ST) Data**	
62	Scheme Name (ST)	Scheme Name as per deeds office, SG ST Plan and register
63	Section Number (ST)	As per deeds office
64	Unit Floor Level (ST)	Record floor level of unit to support valuation
65	Section Type (ST)	Duplex, Simplex, Flats
66	Total Number of units (ST)	As per deeds office

Template "C"

PROPERTY DATA BY PROPERTY TYPE

The following data are required to be collected and captured for periodic reporting and data extraction on the valuation roll.
Municipal valuer is responsible and accountable for all data on the valuation roll.

#	PROPERTY DATA: DATA FIELDS REQUIRED FOR THE VALUATION ROLL MANAGEMENT SYSTEM FOR EACH ROLL RECORD ACCORDING TO THE PROPERTY USE TYPE	COMMENT: EXPLANATION OF DATA REQUIREMENTS FOR THE VALUATION ROLL MANAGEMENT SYSTEM. (READ WITH PROPERTY DATA FIELDS). The VRMS must store the history of all data uPdates for audit purposes. Data extracts and reporting in terms of this template is for current data.
67	Total number of buildings (ST)	Record number of building on the site
68	SG Plan Number (ST)	Source from SG diagram
69	Main Extent (m^2) (ST)	Deeds Office extent for sectional title records
70	Garage Extent (m^2) (ST)	Deeds Office if separately registered
71	Granny Flat / Staff Quarters (m^2) (ST)	Deeds Office if separately registered
72	Carport / Parking (m^2) (ST)	Deeds Office if separately registered
73	Recreational Building (m^2) (ST)	To determine by measurement
74	Guard House (m^2) (ST)	To determine by measurement
75	Gross Building Area (GBA) (ST)	Deeds Office if separately registered
76	**Income Data**	
77	Tenant rent roll document available	Attachment and indicate if available Y/N. To use s42 of the MPRA to request documents and information
78	Other income generating areas e.g. car bays (if applicable)	Attachment and indicate if available Y/N. To use s42 of the MPRA to request documents and information
79	Turnover rental (if applicable)	Amount based on percentage of T/O. To use s42 of the MPRA to request documents and information
80	Gross Rentable area	Rentable Area. Apply tenant rent roll data or as determined by measurement. To use s42 of the MPRA to request documents and information
81	Gross income	Gross Income. From rental evidence. Determined by market research of rentals and general market indicators. To use s42 of the MPRA to request documents and information
82	Gross Expenses	Determined by market research of typical expenses and general market indicators. To use s42 of the MPRA to request documents and information
83	Vacancies	Determined by market research of vacancy levels and general market indicators.Percentage. To use s42 of the MPRA to request documents and information
84	Net Income	Calculate - Gross Income Less Expenses Less vacancies. To use s42 of the MPRA to request documents and information
85	Market capitalisation rate	Percentage. Determined by market research of sales and general market indicators. To use s42 of the MPRA to request documents and information
86	Ratio Expense to gross income	Percentage. To use s42 of the MPRA to request documents and information
87	Rate / m^2 Gross Rentable Area	Calculation.
88	**Agricultural Data**	
89	Irrigable Land extent	s42 Data/Information request. Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. What to do with properties used as Informal housing regarding category/use - COMMENT: To consider apportionment of value and rates in terms of section 9 of the MPRA
90	Rate / Irrigable Land extent	Value Rate
91	Dry Cane Land extent	Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. What to do with properties used as Informal housing regarding category/use - COMMENT: To consider apportionment of value and rates in terms of section 9 of the MPRA

Template "C" PROPERTY DATA BY PROPERTY TYPE

The following data are required to be collected and captured for periodic reporting and data extraction on the valuation roll.
Municipal valuer is responsible and accountable for all data on the valuation roll.

#	PROPERTY DATA: DATA FIELDS REQUIRED FOR THE VALUATION ROLL MANAGEMENT SYSTEM FOR EACH ROLL RECORD ACCORDING TO THE PROPERTY USE TYPE	COMMENT: EXPLANATION OF DATA REQUIREMENTS FOR THE VALUATION ROLL MANAGEMENT SYSTEM. (READ WITH PROPERTY DATA FIELDS). The VRMS must store the history of all data uPdates for audit purposes. Data extracts and reporting in terms of this template is for current data.
92	Rate / Dry Cane Land extent	Value Rate
93	Grazing Land extent	Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. What to do with properties used as Informal housing regarding category/use - COMMENT: To consider apportionment of value and rates in terms of section 9 of the MPRA
94	Rate / Grazing Land extent	Value Rate
95	Irrigated Cane Land extent	Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. What to do with properties used as Informal housing regarding category/use - COMMENT: To consider apportionment of value and rates in terms of section 9 of the MPRA
96	Rate / Irrigated Cane Land extent	Value Rate
97	Timber Land extent	Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. What to do with properties used as Informal housing regarding category/use - COMMENT: To consider apportionment of value and rates in terms of section 9 of the MPRA
98	Rate / Timber Land extent	Value Rate
99	Orchids - Other farming Land extent	Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. What to do with properties used as Informal housing regarding category/use - COMMENT: To consider apportionment of value and rates in terms of section 9 of the MPRA
100	Rate / Orchids - Other farming Land Extent	Value Rate
101	Grass/Bush Land extent	Digitized extents and land uses determined from aerial imagery are considered sufficiently accurate - can be matched against data from the farmer if there is a discrepancy. What to do with properties used as Informal housing regarding category/use - COMMENT: To consider apportionment of value and rates in terms of section 9 of the MPRA
102	Rate / Grass/Bush Land extent	Value Rate
103	**Cost Data**	na
104	Estimated New Replacement Cost (ENRC) All buildings	Applicable for non-market property and where the all other approaches are not applicable
105	Average rate per m^2 (ENRC)	Applicable for non-market property and where the all other approaches are not applicable
106	Depreciation % (Average) where applicable	Expressed as an average percentage across the property for all buildings, applicable for non-market property and where the all other approaches are nor applicable. Linked to year built and condition
107	Estimated Depreciated Replacement Cost (DRC) All buildings	Based on building costs research and market reports of typical similar buildings
108	**General Data**	
109	PFS Average Monthly Literages - Petrol / Diesel	Monthly average literage captured preferably last 3 years, based on market report
110	Occupancy rate	Capture market percentage

Template "C"

PROPERTY DATA BY PROPERTY TYPE

The following data are required to be collected and captured for periodic reporting and data extraction on the valuation roll.
Municipal valuer is responsible and accountable for all data on the valuation roll.

#	PROPERTY DATA: DATA FIELDS REQUIRED FOR THE VALUATION ROLL MANAGEMENT SYSTEM FOR EACH ROLL RECORD ACCORDING TO THE PROPERTY USE TYPE	COMMENT: EXPLANATION OF DATA REQUIREMENTS FOR THE VALUATION ROLL MANAGEMENT SYSTEM. (READ WITH PROPERTY DATA FIELDS). The VRMS must store the history of all data uPdates for audit purposes. Data extracts and reporting in terms of this template is for current data.
111	RevPar history (Revenue per available Room)	Revenue per available Room. A performance measure in the hotel industry, which is calculated by multiplying a hotel's average daily room rate (ADR) by its occupancy rate. It may also be calculated by dividing a hotel's total guestroom revenue by the room count and the number of days in the period being measured. Keep in mind that RevPAR does not take into account revenue from other hotel services, such as restaurants, spars, golf courses, marinas, casinos etc.
112	Past 3 year financials Statements (If Applicable)	Attachment and indicate if available Y/N
113	Number of Hospital Beds	Number
114	Number of Hospital Theatres	Number
115	Number of Hospital Wards	Number
116	Hospitality registration certification	Attachment and indicate if applicable Y/N
117	Potential Bulk Area (Vacant Land Comm)	Extent of land - Commercial
118	Potential Plat-Formed (PF) Area (Vacant Land - Ind)	Extent of land - Industrial
119	Potential Number of Developable Units (Vac Land - Res)	Number of units for residential land
120	**Valuation**	
121	Total Market Value	The Valuation Roll Value
122	Average Rate per unit of comparison based on total market value	To be provided or must be calculable for benchmarking and value review purposes
123	Comment	The valuer must review rates policy for changes to property and any impacts on data collection. Land Tenure Right as defined in ULTRA (Upgrading of Land Tenure Rights Act) and may include any of the property types defined.

ANNEXURE D – (Template "D")

MPRA SALES DATA

Template "D"

SALES DATA FILE
FOR GENERAL VALUATION

The following minimum data are required for periodic reporting and data extraction on the valuation roll - Sales File. The municipal valuer is responsible and accountable for the analysis and provision of the sales file which is a component of the market report

Description	Short Name	Field Format	Data Comment	Extract Type	Responsibility
ID_PIN	ID_PIN	Text/Num	System No.	ROLL	MV
Municipality ID Number	Mun_ID	Text/Num	The municipal identity code allocated to a municipality	ROLL-RATES	Municipal Valuer
Name of Municipality	Mun_Name	Text/Num	Name of Municipality	ROLL-RATES	Municipal Valuer
SG21 Code	SG21	Text	Main parent Surveyor General (SG) Code is a Unique Property Identifier (UPI) derived from property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property.	ROLL & PUBLISH (REGS)	Municipal Valuer
SG21_26 Code	SGP21_26	Text	Surveyor General (SG) Code is a unique property identifier derived from the property description, used as the data link field. Currently the SG code is 21 Digits for Registered full title property and to extend the SG Code for tenure types for MPRA definition of property by adding 5 suffixed digits to create a 26 digit code. See Tenure Type (TT)	ROLL-RATES & PUBLISH (REGS)	Municipal Valuer
SG Holding_Unity	SGH	Text/Num	Surveyor General Code is a unique property identifier derived from the property description, used as the data link field when valuing a grouping of properties which are contiguous and have the same owner and category of property. The combined value of the grouping of properties is shown on the one parent property and the linked holding records will have a zero value. This enables ease of searching and identifying the grouped and valued properties. AKA Unity of Use.	ROLL-RATES & PUBLISH (REGS)	Municipal Valuer
Tenure Type	TT	Text	In accordance with the MPRA, definition of property and roll tenure type. FT= Full Title (Deeds Registered), FTPR = Parent Remainder, ST= Sectional Title (Deeds Registered), FTST = Sectional Title Parent, RR= Registered Rights, registered leases / rights (Deeds Registered), LTR= Land Tenure Rights (MPRA), PSI= Public Service Infrastructure (MPRA), MPU = Multiple Purpose Use (MPRA), UND = Undefined (MPRA). Every property on the roll must have a Tenure Type assigned.	ROLL & PUBLISH (MPRA/REGS)	Municipal Valuer
Geographical area (Suburb)	GA	Text / Num	Based on Suburb collected and captured by Municipal Valuer. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL & PUBLISH (s48 / REGS)	Municipal Valuer
REM	REM	Text	Remainder registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
ERF	ERF	Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
PTN	PTN	Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Town name	TN	Text / Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Farm name	FN	Text / Num	Registered in the Deeds Office description/ Surveyor General diagram description or other description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Unit Section Number	UNIT	Num	Sectional Title Deeds Office description. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Scheme Name	SNME	Text / Num	Sectional Title Deeds Office description / Surveyor General Sectional Title Plan. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Scheme Number_Year	SNUM_YEAR	Text / Num	Sectional Title Deeds Office description / Surveyor General Sectional Title Plan. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL & PUBLISH (s48 / REGS)	Municipal Valuer
Owner	OWN	Text / Num	Deeds Office OR MPRA definition of owner. MPRA Regulations Gaz 29304, Roll Format / Content	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Category of Property (Code)	COP_CDE	Text / Num	Category used for rating in terms of s8. Reference Rates Policy, Data Collection and Regulations Gaz 29304, Roll Format / Content. Published Category for General (GV) Valuation Roll.	ROLL-RATES & PUBLISH - GV (s48 / REGS)	Municipal Valuer
Category of Property Description	COP_DESC	Text / Num	Category used for rating in terms of s8. Reference Rates Policy, Data Collection and Regulations Gaz 29304, Roll Format / Content. Published Category for General Valuation (GV) Roll.	ROLL-RATES & PUBLISH -GV (s48 / REGS)	Municipal Valuer

Template "D"

SALES DATA FILE
FOR GENERAL VALUATION

The following minimum data are required for periodic reporting and data extraction on the valuation roll - Sales File. The municipal valuer is responsible and accountable for the analysis and provision of the sales file which is a component of the market report

Description	Short Name	Field Format	Data Comment	Extract Type	Responsibility
Actual Use (Primary Use) Code	USE_CDE	Text / Num	Actual use with reference to the MPRA s8 (1) part of data collection to support valuations	ROLL (s8 / s9)	Municipal Valuer
Actual Use (Primary Use) Description	USE_DESC	Text / Num	Actual use with reference to the MPRA s8 (1) part of data collection to support valuations	ROLL (s8 /s9)	Municipal Valuer
Physical Address of the Property	ADD	Text / Num	MPRA and Regulations Gaz 29304	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Extent (Land_Unit) m²	EXT	Num	MPRA and Regulations Gaz 29304. Land extent or sectional title unit extent	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Market Value (R)	MV	Num	MPRA and Regulations Gaz 29304. Market value of the property at date of roll report	ROLL-RATES & PUBLISH (s48 / REGS)	Municipal Valuer
Multiple owner Indicator (Y_N)	MULTI_OWN	Text	Deeds Office information, indicator if there is more than one registered owner	ROLL	Municipal Valuer
Gross Building Area (Total Living Area)	GBA	Num	To support sales analysis and CAMA application in square metres	ROLL	Municipal Valuer
Title Deed Number (TDN1, TDN2, etc. ...)	TDN	Txt / Num	Deeds Office data. To record last 2 or 3 sales on a property	DEEDS	Municipal Valuer
Sale Date (SD1, SD2, etc ...)	DOS	Date	Deeds Office data. To record last 2 or 3 sales on a property	DEEDS	Municipal Valuer
Sale Price (SP1, SP2, etc ...)	SP	Num	Deeds Office data. To record last 2 or 3 sales on a property	DEEDS	Municipal Valuer
Buyer (BU1, BU2, etc ...)	BUY	Txt / Num	Deeds Office data. To record last 2 or 3 buyers on a property	DEEDS	Municipal Valuer
Seller (SE1, SE2, etc ...)	SEL	Txt / Num	Deeds Office data. To record last 2 or 3 sellers on a property (3 previous owners)	DEEDS	Municipal Valuer
Bondholder (BH1, BH2 etc ...)	BH	Txt	Deeds Office data. To record last 2 or 3 sales on a property	DEEDS	Municipal Valuer
Bond Amount (BA1, BA2 etc ...)	BA	Num	Deeds Office data. To record last 2 or 3 sales on a property	DEEDS	Municipal Valuer
Neighbourhood	NBH	Txt	Also known as homogeneous area for CAMA application and stratification	ROLL	Municipal Valuer
Multiple sale property	MSP	Txt / Num	Indicator that this property sold with other properties. Title deed num and sales date is one way of collating and analysing a sale which involved more than one sale	SALE	Municipal Valuer
Sale Inspection Indicator	INSP	Txt	Indicator - Inspected Y or N	SALE	Municipal Valuer
Sales Validity Indicator	SVI	Txt / Num	Indicator - After analysis decide if the sale is valid or invalid for the use in the General Valuation - indicated by Y or N	SALE	Municipal Valuer
Sales Comments	Scom	Txt / Num	Comments pertaining to the sale validated and sales rejected	SALE	Municipal Valuer

ANNEXURE E – GENERAL VALUATION (GV) CLOSE OUT REPORT

Annexure E

Project Closeout Report
General Valuation

Name of Municipality: UMUZIWABANTU MUNICIPALITY

Approval of the Project Closeout Report (Annexure E for the general valuation) indicates an understanding that the project is now considered closed by the Project Team, and the Client representative within the Local Municipality concerned. Once the Project Closeout Report is received and finalised as closed and a final delivery certificate has been signed and issued by the Municipal Manager, the full 10% retention may be released.

Approver Name	Title	Signature	Date
	Client Representative		
	Project Manager		
	Municipal Valuer		
	GIS / Data Manager (Property Register)		

Section 1. General Information

Project Name			Bid Reference No:
Local Municipality / Organizational Unit within Local Municipality			
Client Representative	**Phone**	**Email**	**Fax**
Service Provider	**Phone**	**Email**	**Fax**
Municipal Website / Designated Website			

Section 2. General Valuation Deliverables (Refer Bid Specification document)

For each, indicate if the project was successful in meeting the goal or objective and date completed

Item	Project Goal or Objective	Date Operational/Completed	Met?
1	**Project Management Function**		
1.1	Project Management Function		Yes ☐ No ☐

Item	Project Goal or Objective	Date Operational/Completed	Met?
2	**Project Office & Project Establishment**		
2.1	Draft & Finalise Project Contract; project programme and project cash flow plan		Yes ☐ No ☐
2.2	Finalise Sub-Contract Agreements		Yes ☐ No ☐
2.3	Establish Project Office and infrastructure		Yes ☐ No ☐
2.4	Project Office Overheads		Yes ☐ No ☐
2.5	Project Office IT Infrastructure		Yes ☐ No ☐
3	**Valuation Roll Management System (VRMS)**		
3.1	Installation of the Valuation Roll Management System at Project Office – certification and operation demonstrated		Yes ☐ No ☐
3.2	Integration Valuation Roll Management System with Rates Financial System		Yes ☐ No ☐
3.3	Signing of VRMS Service Level Agreement		Yes ☐ No ☐
3.4	Hard Copy & Electronic Data Storage, Back-Up and Retrieval Plan		Yes ☐ No ☐
3.5	Hard Copy & Electronic Data Storage, Back-Up and Retrieval		Yes ☐ No ☐
4.A	**Aerial Photography (refer to specifications)**		
4A.1	Acquire aerial photography/imagery for the Town (urban) areas only (0.25 resolution)		Yes ☐ No ☐
4A.2	Acquire aerial photography/imagery for the balance being Rural/Farm areas only (0.25 resolution)		Yes ☐ No ☐
4.B	**Property Register preparation for the general valuation**		Yes ☐ No ☐
4B.1	Identify data sources		Yes ☐ No ☐
4B.2	Acquire, clean and prepare data (in addition to 4.3 and 4.4 below)		Yes ☐ No ☐
4B.3	Deeds office data (ownership and sales data) extracts as per bid document and integration to VRMS		Yes ☐ No ☐
4B.4	Prepare and create Property Register which shall comprise an electronic data base of all properties in terms of the bid specifications and best practice		Yes ☐ No ☐
4B.5	Prepare and create a Valuation Roll GIS cadastral layer in ESRI shape file format aligned to the property register database as per bid document specifications		Yes ☐ No ☐
4B.6	Undertake a record match between the new property register database (valuation roll) records and the valuation roll GIS cadastral layer and produce an exception report with corrective action plan.		Yes ☐ No ☐
4B.7	Undertake a record match between the new property register database (valuation roll) records and the rates financial system records and identify mismatches in a report.		Yes ☐ No ☐

Item	Project Goal or Objective	Date Operational/Completed	Met?
4B.8	Prepare and create a digitised building footprint plan (layer) in ESRI shape file format for each building valued using the specified aerial photography. This will not be required where Non-CAMA methodology (individual valuation per property) is applied and where a building is inspected and measured on site with a sketch provided per building.		Yes ☐ No ☐
5	**Project Sales Review; Market and Valuation Methodology Reports**		
5.1	Residential Contract Sales Review/Market Report & Valuation Methodology Report (to be read with annexure D) : 1) Initial market report and (2) final market report and to include • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Data collection sales review forms per property • Provide data extracts		Yes ☐ No ☐
5.2	Non-Residential (includes agricultural PSI and special property types) Contract Sales Review/Market Report/ Costs reports & Valuation Methodology Reports (to be read with annexure D): 1) Initial market report and (2) final market report and must include • Sales cadastral plans • Schedule of all usable sales reviewed in preparation for the general valuation • Building cost report for specialised properties • Data collection sales review forms per property • Provide data extracts • Valuation templates		Yes ☐ No ☐
5.3	Data Collection, Data Capture and Digitised Building Footprint methodology, quality assurance plans and training manuals.		Yes ☐ No ☐
5.4	General Valuation Roll (GV) close out report **(Annexure E)**		Yes ☐ No ☐
5.5	**General valuation roll objections / appeals processing**: by the municipal valuer in terms of the MPRA as envisaged by Sections 50, 51, 52, 53 and 69 and the bid specifications.		Yes ☐ No ☐
5.6	General Valuation Objection processing close out report: including count, value changes and GIS spatial layer update (including Year 1) **Annexure F**		Yes ☐ No ☐
5.7	General Valuation Appeals processing (only attendance at appeal boards can be claimed as quoted under Part D of the schedule).		Yes ☐ No ☐
5.8	General Valuation Appeal close out report: including count, value changes and GIS spatial layer update (including Year 1) **Annexure G**		Yes ☐ No ☐
5.9	Collection and upload of photographs (JPEG format and 2 photos per building). To be priced on a rate per property if required.		Yes ☐ No ☐
6	**Data collection RESIDENTIAL**		
6.1	Develop and submit Data Collection and QA plan		Yes ☐ No ☐
6.2	Prepare & submit training manuals & Data collection forms		Yes ☐ No ☐
6.3	Recruit & Train data collectors		Yes ☐ No ☐

Item	Project Goal or Objective	Date Operational/Completed	Met?
6.4	Collect / Verify and Capture Data (data, sketch, photos etc)		Yes ☐ No ☐
6.5	Collect / Verify and Capture Postal Address Data		Yes ☐ No ☐
6.6	Quality assurance Data Review		Yes ☐ No ☐
6.7	Maintain data		Yes ☐ No ☐
6.8	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications		Yes ☐ No ☐
7	**RESIDENTIAL Valuations**		
7.1	Generate values (Draft Value per property /Draft Valuation Roll)		Yes ☐ No ☐
7.2	Quality Assurance Value Review with sales ratio study		Yes ☐ No ☐
7.3	Value Finalisation (Final Value per property /Final Valuation Roll)		Yes ☐ No ☐
7.4	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications		Yes ☐ No ☐
8	**Data collection NON RESIDENTIAL**		
8.1	Develop and submit Data Collection and QA plan		Yes ☐ No ☐
8.2	Prepare & submit training manuals & Data collection forms		Yes ☐ No ☐
8.3	Collect / Verify and Capture Data (data, sketch, photos etc)		Yes ☐ No ☐
8.4	Collect / Verify and Capture Postal Address Data		Yes ☐ No ☐
8.5	Quality assurance Data Review		Yes ☐ No ☐
8.6	Maintain data		Yes ☐ No ☐
8.7	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications		Yes ☐ No ☐
9	**Non Residential Valuations**		
9.1	Valuations		Yes ☐ No ☐
9.2	Quality Assurance Value Review		Yes ☐ No ☐
9.3	Value Finalisation (draft valuation roll)		Yes ☐ No ☐
9.4	Provide data extracts in terms of the MPRA (s85), applicable standards and the bid specifications		Yes ☐ No ☐
10	**Valuation roll**		
10.1	Compile and print Final General Valuation Roll certified by the Municipal valuer and hand over to municipal manager		Yes ☐ No ☐
10.2	Upload the General Valuation Roll and Objections forms to designated Website		Yes ☐ No ☐
10.3	General Valuation Roll close out report **Annexure E**		Yes ☐ No ☐
10.4	Provision and submission of all General Valuation data, documents, reports and information generated from the general valuation in terms of the bid specifications and the MPRA		Yes ☐ No ☐

Item	Project Goal or Objective	Date Operational/Completed	Met?
ANN. D	ANNEXURE D – DATA AS PER TEMPLATES VERIFIED AS SUPPLIED AND CAPTURED (Template A, B, C, D)		Yes ☐ No ☐

Note : Also, attach project programme as at date of General Valuation Close out report.

Section 3. Project Risks/Issues and Mitigation

Indicate if any risks identified at project inception, and/or during the General Valuation Phase occurred and turned into an issue. Describe how the issue was resolved or indicate if the issue is still open. Expand below as may be required.

Item	Risk Identification and Mitigation	Open Issue
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐

Section 4. Project Quality

List out major General Valuation Phase deliverables for this project and indicate what quality control review took place and if the review was approved.

Item	Risk per Project Plan	Reviewer Name	Approved
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐

Section 5. Project Costs and Schedule

Using Earned Value Management, what was the final project performance in terms of costs and schedule?

Cost Parameter	Value	Comments
Approved Bid Price: General Valuation		
Approved Price Variations: General Valuation		
Actual Cost: General Valuation		
Notes:		

Attach :

- *Reconciliation of Bid Values/Property Category Counts and Actual Values/Property Category Counts as at end of the General Valuation Phase*
- *Final Statement of Account as at end of General Valuation Phase*

Section 6. Project Files

Indicate the location of all hardcopy and electronic data files used for and created by this project. This would include all work products, deliverables, minutes, memo's and all information related to and specified in the project bid and scope. Also, indicate if the project file referred to has been signed for and handed to the Client's Representative

Work Product / File Name	Location	Service Provider Point of Contact	Delivered to & Received by Client
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐

Section 7. Project Lessons Learned

Identify lessons learned specifically for the project. State the lessons learned in terms of a problem (issue). Describe the problem and include any project documentation references (e.g., Project Plan, Issues Log) that provide additional details. Identify recommended improvements to correct a similar problem in the future.

Problem or Issue	References	Recommended Changes

Section 8. Post-Implementation Plans and transition into Supplementary Phase

Action	Planned Date	Assigned To	Frequency

Action	Planned Date	Assigned To	Frequency

Identify plans for completing post-implementation activities and tasks to transition into Maintenance Phase

Section 9: Critical Dates, Categories of Property, Market Value and Rate in the Rand

Project Goal or Objective	Date
General Valuation Roll – Date of Valuation	
General Valuation Roll - Date of Certification	
Date General Valuation Roll handed to Municipal Manager	
General Valuation Roll - Effective Date	
GV Roll Validity Period	

From:		To:	

Categories of properties (Please provide Categories of Property as per Valuation Roll & Tariff Policy)	Number of properties per category	Total market value of properties in roll	Effective Rate in the Rand approved by Local Municipality	Rates amount per category
Include as List per category of property				

- *Copy of Front Cover of General Valuation Roll*
- *Copy of roll certification by Municipal Valuer of General Valuation Roll*
- *Extracts of a typical page in the roll for Full title and Sectional title properties*
- *For Supplementary rolls the same information to be provided*

Section 10. Open Issues

Describe any open issues and plans for resolution within the context of project closeout.

Issue	Planned Resolution

ANNEXURE F – OBJECTION CLOSE OUT REPORT (GV)

Annexure F

Project Closeout Report
Objection Processing (General Valuation)

Name of Municipality: UMUZIWABANTU MUNICIPALITY

Approval of the Project Closeout Report indicates an understanding that this project is at the end of the Objection Processing Phase and is now considered closed by the Project Team, and the Client representative within the Local Municipality concerned. Once the Project Closeout Report is received and finalised as closed and a final delivery certificate has been signed and issued by the Municipal Manager, the full 10% retention may be released.

Approver Name	Title	Signature	Date
	Client Representative		
	Project Manager		
	Municipal Valuer		
	GIS / Data Manager (Property Register)		

Section 1. General Information

Project Name			Bid Reference No:
Local Municipality / Organizational Unit within Local Municipality			
Client Representative	**Phone**	**Email**	**Fax**
Service Provider	**Phone**	**Email**	**Fax**
Municipal Website / Designated Website			

Indicate Yes/No objection report against:

General Valuation Roll: ……..

Section 2. General Valuation Phase Deliverables (Refer Bid Specification document)

For each, indicate if the project was successful in meeting the goal or objective and date completed

Item	Project Goal or Objective	Date Operational/Completed	Met?
11	**General Valuation Objections processing and management**		
11.1	Process objections in terms of the MPRA • Record objections in database • Respond in writing to objectors • Consider objections and adjust value, if appropriate • Make available sales evidence in support of decision upon request • Provide written reasons to the municipal manager for adjustments greater than 10% • GIS cadastral layer updated of objections received with decisions and changes • Notify objectors in writing of decision • Provide written reasons to objectors for adjustment upon request from objectors • Represent the Municipality at Valuation Appeal Board meetings on reviews • Update valuation roll with municipal Valuer and appeal board review decisions • Billing system updated with municipal Valuer and appeal board review decisions		Yes ☐ No ☐
11.2	Close out report on objections **Annexure F**		Yes ☐ No ☐

Objection Status*: Provide stats of objections and value adjustments as per table below. Also, attach project program as at date of Objection Processing Closeout Report.*

No	*Description*	*Number*	*Value amount*
1	*Total Number of objections received by the municipal manager and forwarded to the municipal Valuer for processing*		
2	*Total number and value of objections adjusted by the municipal Valuer by **more than 10% up***		
3	*Total number and value of objections adjusted by the municipal Valuer by **more than 10% down***		

Section 3. Project Risks/Issues and Mitigation

Indicate if any risks identified at project inception, and/or during the General Valuation Phase occurred and turned into an issue. Describe how the issue was resolved or indicate if the issue is still open. Expand below as may be required.

Item	Risk Identification and Mitigation	Open Issue
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐

Section 4. Objections (Only) Project Costs and Schedule (Section "N" of bid quote)

Provide final project financial and scope as at end of the Appeal Processing Phase.

SECTION N OF BID DOCUMENTS					
Item	**Description**	**Unit**	**R amount (incl VAT)**	**Total Number**	**Total Cost**
11	**General Valuation Objections / Appeals processing and management**				
11.2	General Valuation Close out report on objections (Annexure F)	Per report			
Total					

Attach :

- *Statement of Account as at end of Appeal Processing Phase*

Provide final project financial and scope as at end of the Objection Processing Phase.

Total			

Attach :

- *Schedule reflecting reconciliation of Bid Values/Property Category Counts and Actual Values/Property Category Counts as at end of the Objection Phase*
- *Final Statement of Account as at end of Objection Phase*
- *Copy of Section 49 notice placed in the Press, Government Gazette and section 49 notices posted to property owners, as well as Copy of Objection Forms, A, B, C*

Note: Processing of objections in terms of the MPRA and Bid is priced in the bid rates and therefore no additional cost. This close out report however can be claimed as a cost which is priced in the Bid.

Section 5. Project Files

Indicate the location of all hardcopy and electronic data files used for and created by this project and related to the Objection Process. This would include all work products, deliverables, minutes, memo's, prescribed section 49 notices, objection forms, reason letters, and all information related to and specified in the project bid and scope. Also, indicate if the project file referred to has been signed for and handed to the Client's Representative

Work Product / File Name	Location	Service Provider Point of Contact	Delivered to & Received by Client
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐

Section 6. Project Lessons Learned

Identify lessons learned specifically for the Objection Processing. State the lessons learned in terms of a problem (issue). Describe the problem and include any project documentation references (e.g., Project Plan, Issues Log) that provide additional details. Identify recommended improvements to correct a similar problem in the future.

Problem or Issue	References	Recommended Changes

Section 7. Post-Implementation Plans and transition into Appeal and Supplementary Phase

Action	Planned Date	Assigned To	Frequency

Identify plans for completing post-implementation activities and tasks to transition into Supplementary Phase

Section 8. Categories of Property, Market Value and Rate in the Rand

*To provide an updated summary of the full valuation roll **after** objections have been processed and adjusted to the roll by the municipal valuer and the rates department.*

Categories of properties (Please provide Categories of Property as per Valuation Roll & Tariff Policy)	Number of properties per category	Total market value of properties in roll	Effective Rate in the Rand approved by Local Municipality	Rates amount per category
Include as List per category of property				

Section 9. Open Issues

Describe any open issues and plans for resolution within the context of this project phase closeout.

Issue	Planned Resolution

ANNEXURE G – APPEAL CLOSE OUT REPORT (GV)

Annexure G

Project Closeout Report

Appeal Processing (General Valuation)

Name of Municipality: UMUZIWABANTU MUNICIPALITY

Approval of the Project Closeout Report indicates an understanding that this phase of the project is now considered closed by the Project Team and the Client representative within the Local Municipality concerned. This close out report must be completed for the general valuation and valuation roll prepared in terms of the MPRA. No retention is applicable for appeals.

Approver Name	Title	Signature	Date
	Client Representative		
	Project Manager		
	Municipal Valuer		
	GIS / Data Manager (Property Register)		

Section 1. General Information

Project Name			Bid Reference No:
Local Municipality / Organizational Unit within Local Municipality			
Client Representative	**Phone**	**Email**	**Fax**
Service Provider	**Phone**	**Email**	**Fax**
Municipal Website / Designated Website			

Section 2. General Valuation Deliverables (Refer to the Bid Specification document)

For each, indicate if the project was successful in meeting the goal or objective and date completed

Item	Project Goal or Objective	Date Completed	Met?
11	**General Valuation Appeals processing and management**		
11.3	Process Appeals in terms of the MPRA • Record appeals in database (roll) • Make available sales evidence in support of decision upon request • GIS cadastral layer updated of appeals received with decisions and changes • Represent the Municipality at Valuation Appeal Board hearings • Update valuation roll with appeal board appeal decisions • Billing system updated with appeal board appeal decisions		Yes ☐ No ☐
11.4	Close out report on appeals **Annexure G**		Yes ☐ No ☐

Note : Also, attach the project programme as at date of Objection Processing Close Out Report.

Section 3. Project Risks/Issues and Mitigation

Indicate if any risks identified at project inception, and/or during the Appeal Processing occurred and turned into an issue. Describe how the issue was resolved or indicate if the issue is still open. Expand below as may be required.

Item	Risk Identification and Mitigation	Open Issue
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐

Section 4. Project Costs and Schedule

Provide final project financial and scope as at end of the Appeal Processing Phase.

SECTION N OF BID DOCUMENTS					
Item	**Description**	**Unit**	**R amount (incl VAT)**	**Total Number**	**Total Cost**
11	**General Valuation Objections / Appeals processing and management**				
11.4	General Valuation Close out report on appeals (Annexure G)	Per report			
9	**Attendance at appeal board meetings by the municipal Valuer or by delegation an assistant municipal Valuer for appeal hearings and objection reviews**				
9.1	Attendance at Appeal Board meetings by the Municipal Valuer	PER APPEAL			
9.2	Attendance at Appeal Board meetings by the delegated assistant municipal Valuer	PER APPEAL			
9.3	Vehicle travel to attend appeal board hearings and meetings	Rate/km			
Total					
Attach : • *Statement of Account as at end of Appeal Processing Phase*					

Appeal Status*: (GV): Provide stats of appeal and value adjustments as per table below. Also, attach project program as at date of Processing Closeout Report.*

No	*Description*	*Number*	*Value amount*
1	*Total number and value of appeals received by the municipal manager and forwarded to the appeal board chairperson for hearing.*		
2	*Total number and value of appeals heard and adjusted by the appeal board **up.***		
3	*Total number and value of appeals heard and adjusted by the appeal board **Down**.*		
4	*Total number and value of appeals heard and **unchanged** by the appeal board.*		

Note: To provide evidence of adjustments to the roll and rates in terms of Section 69 and 55 of the MPRA.

Section 5. Project Files

Indicate the location of all hardcopy and electronic data files used for and created by this project and related to the Appeal Processing Phase. This would include all work products, deliverables, minutes, memo's, appeal forms, and all information related to and specified in the project bid and scope. Also, indicate if the project file referred to has been signed for and handed to the Client's Representative.

Work Product / File Name	Location	Service Provider Point of Contact	Delivered to & Received by Client
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐

Section 6. Project Lessons Learned

Identify lessons learned specifically for the Appeal Processing. State the lessons learned in terms of a problem (issue). Describe the problem and include any project documentation references (e.g., Project Plan, Issues Log) that provide additional details. Identify recommended improvements to correct a similar problem in the future.

Problem or Issue	References	Recommended Changes

Section 7. Post-Implementation Plans and transition into Supplementary Phase Tasks

Action	Planned Date	Assigned To	Frequency

Identify plans for completing post-implementation activities and tasks to transition into Supplementary Phase

Section 8. Categories of Property, Market Value and Rate in the Rand

To provide an updated summary of the full valuation roll after appeals have been processed and adjusted to the roll.

Categories of properties (Please provide Categories of Property as per Valuation Roll & Tariff Policy)	Number of properties per category	Total market value of properties in roll	Effective Rate in the Rand approved by Local Municipality	Rates amount per category
Include as List per category of property				

Section 9. Open Issues

Describe any open issues and plans for resolution within the context of project closeout.

Issue	Planned Resolution

ANNEXURE H – SUPPLEMENTARY ROLL MAINTENANCE REPORTS

Annexure H

Project Closeout Report

Supplementary Valuation Rolls (SVR) & Annual Maintenance Period

Period: July 2028 to June 2033

Name of Municipality: UMUZIWABANTU MUNICIPALITY

Approval of the Project Closeout Report indicates an understanding that this project is now considered closed by the Project Team and the Client representative within the Local Municipality concerned.

Approver Name	Title	Signature	Date
	Client Representative		
	Project Manager		
	Municipal Valuer		
	GIS / Data Manager (Property Register)		

Section 1. General Information

Project Name			Bid Reference No:
Local Municipality / Organizational Unit within Local Municipality			
Client Representative	**Phone**	**Email**	**Fax**
Service Provider	**Phone**	**Email**	**Fax**
Municipal Website / Designated Website			

Section 2: For each Supplementary Roll prepared and completed provide:

Supplementary Valuation Roll Number (SVR No:) :	Date of Certification	Effective Date

Note: Section 2.1 to Section 2.3 to be completed per SVR

Section 2.1: Critical Supplementary Dates and Publications SVR No:_____

Project Goal or Objective	Date Operational/Completed	Met?
Supplementary Valuation Roll No: _____		
Supplementary Valuation Roll – Date of Certification		
Supplementary Valuation Roll – Effective Date		
Date Supplementary Roll handed to Municipal Manager		
Date Public Inspection and Objection Period Commenced		Yes ☐ No ☐
Date First Section 49 Notice Published in Media		Yes ☐ No ☐
Date Second Section 49 Notice Published in Media		Yes ☐ No ☐
Date Section 49 Notice Published in Gazette		Yes ☐ No ☐
Date Section 49 Notices postage commenced Property Owners		Yes ☐ No ☐
Date Section 49 Notices was placed onto available website		Yes ☐ No ☐
Date Supplementary Valuation Roll and Objection Forms accessible at Municipal Offices and designated website		Yes ☐ No ☐
Date Public Inspection and Objection Period Closed		Yes ☐ No ☐

Section 2.2: Categories of Property, Market Value and Rate in the Rand SVR No:_____

*To provide an updated summary of the full (consolidated) amended valuation roll **after** the supplementary valuation roll has been uploaded to the roll and rates financial system.*

Categories of properties (Please provide Categories of Property as per Valuation Roll & Tariff Policy)	Number of properties per category	Total market value of properties in roll	Effective Rate in the Rand approved by Local Municipality	Rates amount per category
Include as List per category of property				

Section 2.2: Number of Properties Count per Section 78 Categories

Section 78 Category of Property Description	Number of properties per section 78 category

Section 2.3: Supplementary Valuation Roll Deliverables as per SVR No:_____

For each, indicate if the project was successful in meeting the goal or objective and date completed

Item	Project Goal or Objective	Date Completed	Met?
SVR	**Supplementary Valuation Roll/s (SVR No:_____)**		
1	Compile Supplementary Roll/s • Attend to all s78 supplementary valuations (SV) including the notifications and review decisions in terms of s78 (5) • 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 • Certify SVR and deliver to the municipal manager • Support section 49 process in terms of the MPRA • Upload SVR and Objection Forms to designated website • Update the Valuation Roll via the VRMS and MFMS		Yes ☐ No ☐
2	Perform ongoing maintenance and undertake corrections of the Valuation Roll GIS cadastral layer in ESRI shape file format in terms of the bid specifications, to ensure that the valuation roll (property register) and the GIS valuation roll layer are synchronised. To deliver with the supplementary valuation roll.		Yes ☐ No ☐
3	Process supplementary objections and appeals and provide status		Yes ☐ No ☐
4	VRMS available and operational and necessary extract and exports in terms of Bid specifications		Yes ☐ No ☐
5	Municipal Valuer confirmed appointed and designated by the municipal manager		Yes ☐ No ☐

Section 3: Register of Properties: Part A and Part B (Section 23 of the MPRA)

Item	Project Goal or Objective	Date	Met?
1	Register of Properties in place: Part A		Yes ☐ No ☐
2	Register of Properties last updated with SVR		Yes ☐ No ☐
3	Register of Properties : Part B – date last updated		Yes ☐ No ☐
4	Register of Properties open for inspection by the public during office hours		Yes ☐ No ☐

Section 4. Project Costs and Schedule

Provide final project financial and scope progressively as at end of each supplementary valuation roll phase.

SECTION N OF BID DOCUMENTS					
Item	**Description**	**Unit**	**R amount (incl VAT)**	**Total Number**	**Total Cost**
12	**Updating of valuation rolls:** Perform the functions of the municipal Valuer, preparation of supplementary valuations and preparation of an annual supplementary valuation roll in terms of the MPRA and Bid specifications with the Annexure "H" report. (table 1 cross ref item 7)				
12.1	Updating of valuations rolls: Perform the functions of municipal Valuer including the section 78 and 49 administrative support and notifications (1st Financial Year after GV effective date)				
12.1.1	Updating of Valuation Roll GIS Cadastral layer: (1st Financial Year after GV effective date)				
12.1.2	Supplementary Valuation Roll report: Includes body of evidence to confirm MPRA compliance one roll per annum (1st Financial Year after GV effective date). Annexure H	1 x Report			
12.1.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79				
12.2	Updating of valuations rolls: Perform the functions of municipal Valuer including the section 78 and 49 administrative support and notifications (2nd Financial Year after GV effective date)				
12.2.1	Updating of Valuation Roll GIS Cadastral layer: (2nd Financial Year after GV effective date)				
12.2.2	Supplementary Valuation Roll report: Includes body of evidence to confirm MPRA compliance one roll per annum (2nd Financial Year after GV effective date). Annexure H	1 x Report			
12.2.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79				
12.3	Updating of valuations rolls: Perform the functions of municipal Valuer including the section 78 and 49 administrative support and notifications (3rd Financial Year after GV effective date)				

SECTION N OF BID DOCUMENTS					
Item	**Description**	**Unit**	**R amount (incl VAT)**	**Total Number**	**Total Cost**
12.3.1	Updating of Valuation Roll GIS Cadastral layer: (3rd Financial Year after GV effective date)				
12.3.2	Supplementary Valuation Roll report: Includes body of evidence to confirm MPRA compliance one roll per annum (3rd Financial Year after GV effective date). Annexure H	1 x Report			
12.3.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79				
12.4	Updating of valuations rolls: Perform the functions of municipal Valuer including the section 78 and 49 administrative support and notifications (4th Financial Year after GV effective date)				
12.4.1	Updating of Valuation Roll GIS Cadastral layer: (4th Financial Year after GV effective date)				
12.4.2	Supplementary Valuation Roll report: Includes body of evidence to confirm MPRA compliance one roll per annum (4th Financial Year after GV effective date). Annexure H	1 x Report			
12.4.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79				
12.5	Updating of valuations rolls: Perform the functions of municipal Valuer including the section 78 and 49 administrative support and notifications (5th Financial Year after GV effective date)				
12.5.1	Updating of Valuation Roll GIS Cadastral layer: (5th Financial Year after GV effective date)				
12.5.2	Supplementary Valuation Roll report: Includes body of evidence to confirm MPRA compliance one roll per annum (5th Financial Year after GV effective date). Annexure H	1 x Report			
12.5.3	Source and supply MONTHLY deeds office transfer data (ownership and sales data) extracts for the updating of the valuation roll - sections 77, 78 and 79				
13	**Valuation roll management system (VRMS) (Available, licenced and functional as per bid and bid specifications) (table 1 item cross ref with No. 8). Includes all data extracts / exports**				
13.1	VRMS Licence SLA Year 1 (first Financial Year after GV effective date)				
13.2	VRMS Licence SLA Year 2 (second Financial Year after GV effective date)				
13.3	VRMS Licence SLA Year 3 (third Financial year after GV effective date)				

SECTION N OF BID DOCUMENTS					
Item	**Description**	**Unit**	**R amount (incl VAT)**	**Total Number**	**Total Cost**
13.4	VRMS Licence SLA Year 4 (fourth Financial Year after GV effective date)				
13.5	VRMS Licence SLA Year 5 (fifth Financial Year after GV effective date)				
Total					
Attach : *Statement of Account as at end of each progressive Supplementary Valuation Roll certified and submitted.*					

***Objection Status**: (Supplementary Roll): Provide stats of objections and value adjustments as per table below. Also, attach project program as at date of Processing Close Out Report.*

No	*Description*	*Number*	*Value amount*
1	*Total number and value of objections received by the municipal manager and forwarded to the municipal Valuer for processing*		
2	*Total number and value of objections adjusted by the municipal Valuer of **10% or less***		
3	*Total number and value of objections adjusted by the municipal Valuer by **more than 10% up***		
4	*Total number and value of objections adjusted by the municipal Valuer by **more than 10% down***		
5	*Total number and value of objections reviewed and the municipal Valuers decision "Confirmed" by the appeal board*		
6	*Total number and value of objections reviewed and the municipal Valuers decision "Amended" by the appeal board*		
7	*Total number and value of objections reviewed and the municipal Valuers decision "Revoked" by the appeal board*		

***Appeal Status**: (supplementary roll): Provide stats of objection / appeal and value adjustments as per table below. Also, attach project program as at date of Processing Close Out Report.*

No	*Description*	*Number*	*Value amount*
1	*Total number and value of appeals received by the municipal manager and forwarded to the appeal board chairperson for hearing.*		

2	*Total number and value of appeals heard and adjusted by the appeal board **up.***		
3	*Total number and value of appeals heard and adjusted by the appeal board **Down**.*		
4	*Total number and value of appeals heard and **unchanged** by the appeal board.*		

Note: To provide evidence of adjustments to the roll and rates in terms of Section 69 and 55 of the MPRA.

Section 5. Project Risks/Issues and Mitigation

Indicate if any risks identified at project inception, and/or during the Supplementary Valuation Phase occurred and turned into an issue. Describe how the issue was resolved or indicate if the issue is still open. Expand below as may be required.

Item	Risk Identification and Mitigation	Open Issue
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐

Section 6. Project Quality

List out major Maintenance Phase deliverables for this project and indicate what quality control review took place and if the review was approved.

Item	Risk per Project Plan	Reviewer Name	Approved
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐

Section 6. Project Files

Indicate the location of all hardcopy and electronic data files used for and created by this project. This would include all work products, deliverables, minutes, memo's and all information related to and specified in the project bid and scope. Also, indicate if the project file referred to has been signed for and handed to the Client's Representative

Work Product / File Name	Location	Service Provider Point of Contact	Delivered to & Received by Client
			Yes ☐ No ☐
			Yes ☐ No ☐
			Yes ☐ No ☐

Section 7. Project Lessons Learned

Identify lessons learned specifically for the project. State the lessons learned in terms of a problem (issue). Describe the problem and include any project documentation references (e.g., Project Plan, Issues Log) that provide additional details. Identify recommended improvements to correct a similar problem in the future.

Problem or Issue	References	Recommended Changes

Section 8. Post-Implementation Plans and transition into next supplementary valuation phase or General Valuation Cycle where applicable

Action	Planned Date	Assigned To	Frequency

Identify plans for completing post-implementation activities and tasks to transition into next maintenance phase cycle and/or general valuation when applicable.

Section 9. Open Issues

Describe any open issues and plans for resolution within the context of project closeout.

Issue	Planned Resolution

ANNEXURE I – AGRICULTURAL GUIDELINES

Guidance: Agricultural Property Valuation

Interpreting specific provisions of the Municipal Property Rates Act, No. 6 of 2004 (as amended) in the Valuation of Agricultural Properties

Introduction

The Municipal Property Rates Act, Act 6 of 2004 as amended (the MPRA) - provides that all properties in South Africa be valued for rating purposes on the basis of Market Value.

This is provided for in Section 46 (1) as follows:

"Subject to any other applicable provisions of this Act, the market value of a property is the amount the property would have realised if sold on the date of valuation in the open market by a willing seller to a willing buyer"

Those familiar with the Act will be aware that the requirement of Market Value is, for certain property categories, subject to certain limitations.

With specific reference to agricultural properties, there are certain provisions in the Act which may be open to differing interpretations. These can lead to farms in adjacent municipalities with similar farmland, some forming part of the same farm, being valued at differing values. This may not necessarily be due to the application of varying market factors, but rather inconsistent interpretations of the Act as to 'what is to be valued'.

The provisions relate to:

- the exclusion of annual crops to be harvested;
- the exclusion of immovable equipment or machinery and underground improvements.
- the inclusion of the irrigation pump installation.

Where farms are typically sold with irrigated lands and equipment, or inclusive of part or all of the annual crop in rotation, the above exclusions will require adjustments to made to the values reached. Ratepayers will thus be aware that in certain agricultural sectors, there will be a difference between 'Open Market Value' as defined globally, and 'Open Market Value for Rating Purposes' in South Africa.

The guidelines are therefore intended to promote a consistent approach to the interpretation of these limitations and variations to market value for the valuation of agricultural properties for rating purposes under the Act.

In order to value agricultural property the following is a definition of "agricultural property" to apply to the guidelines –

"Agricultural property" *- means a property that is used primarily for agricultural purposes but, without derogating from section 9, excludes any portion thereof that is used commercially for the hospitality of guests, and excludes the use of the property for the purpose of ecotourism or for the trading in or hunting of game.*

Proposed Guideline #1. Interpretation of Annual Crop Values:

S46 (4) of the MPRA states:
" in determining the market value of a property used for agricultural purposes, the value of any annual crops or growing timber on the property that have not yet been harvested as at the date of valuation must be disregarded for the purpose of valuing the property."

Growing Timber

In disregarding the value of growing timber, this is taken to mean that land on which timber with a commercial or contributory value is growing must be valued as if such timber did not exist. Growing timber is taken to include the 'coppice' or the stump re-growth that is left behind after a plantation is cut away, and which is of a variety that the coppice will generate new tree growth.

All other farm improvements such as plantation roads, infrastructure and improvements are to NOT to be disregarded.

Due care must be exercised in assessing the value of such land when and if the valuation is reliant on comparable sales in which such timber is included on an 'all in' basis are selected for comparison and analysis.

The application of such sales should yield similar results to comparisons made with land and infrastructure with timber potential, with adjustments, as required, for existing infrastructure on the subject farm.

Annual Crops

The MPRA provides that 'the value of any annual crop not yet Harvested as at the date of valuation must be disregarded for purposes of valuing the property.'

Before considering what constitutes the 'annual crop' on a productive farm, it is important to distinguish between the plant and the crop.

The following schedule serves as a guide to distinguishing some of the plants and crops in South Africa.

Schedule of annual crops to be disregarded:

Plant	Annual Crop	Should the plant be disregarded with the crop?
Banana Plantations	Bananas	No
Berry Producing Plants	Berries	No
Citrus	Oranges, lemons, grapefruit,	No
Coffee/Tea	Coffee/Tea	No
Cotton	Cotton	No
Deciduous Fruit Orchards	Fruit	No
Sisal	Fibre crop	Yes
Grain Crops	Grain	Yes
Melons	Fruit	No
Olive Groves	Olives	No
Potatoes	Potatoes	Yes
Sugar cane	Stem	No
Vineyards	Grapes	No

Annual crops are taken to mean the total harvest or yield that is gathered over a 12 month cycle.

Thus the value of the annual crop must be disregarded if it formed part of a going concern transaction. However, in many farming sectors, the annual crop will be considered separately from the price paid for the immoveable property (eg vegetable operations) and so the comparable sales in such sectors will exclude the annual crop value.

As an example to distinguish between a plant and a crop, a productive sugar cane farm planted in rotation will often harvest only a portion of the total crop planted during a 12 month period. At sale, such a farm property may sell with or without part, or all of the cane that will be cut during the harvesting season.

Cane is a plant that "ratoons" for several years before new cane roots require replanting. That is to say that the cane stem, once cut, leaves behind a short 'stump' and 'root' that will regenerate to yield 4 to 6 more crops depending on soils, cane variety and rainfall levels.

In this instance the 'root' is the plant and the cane stem that is cut constitutes the crop.

If the value of the annual crop that is harvested is found to form part of the price paid for the comparable sale of the immoveable property, then the Valuer will disregard/deduct the net annual crop value and apply the residual benchmarks, after any other relevant adjustments, thereby resulting in a market value for rating purposes.

The value of the crop in this instance is the gross market price prevailing at the Fixed Date, less all costs associated with harvesting, transporting to the sugar mill and any other costs associated with the sale for the annual crop at point of sale (including levies). The same principle will apply to deciduous fruits and crops that are harvested from plants that regenerate future crops.

Pastures

For the purposes of clarification, pastures are specifically defined. Pastures are grown for livestock consumption and are normally grazed in rotation. The value of the land established

to pasture is typically expressed as a rate per hectare and is typically based on the establishment costs of that pasture together with associated carrying capacities.

In no instances are farm prices declared found to be assessed 'net' of pasture lands, and thus no adjustment is necessary for the pasture crop.

Proposed Guideline #2. Machinery, Equipment and Irrigated Lands

Section 46 (3) (b) of the MPRA states:

"In determining the market value of a property the following must be disregarded for purposes of valuing the property:

(b) "The value of any equipment or machinery which, in relation to the property concerned, is immovable property, excluding –

(i) a lift
(ii) an escalator
(iii) an air-conditioning plant
(iv) fire extinguishing apparatus
(v) a water pump installation for a swimming pool or for irrigation or domestic purposes
(vi) any other equipment or machinery that may be prescribed"

With regard to agriculture, this provision is interpreted as requiring all immoveable equipment and machinery to be disregarded, except the irrigation pump installation which is to be included.

Property is clearly defined in Section 1 of the Act. Other than the above inclusions, and other than the Public Services Infrastructure specified in Section 1 of the Act, all plant and equipment, both moveable and immoveable, is thus excluded for purposes of valuation in terms of the Act.

Movable and immovable equipment & machinery on agricultural properties

As indicated above, movable and immoveable equipment and machinery are to be excluded and, in the case of agriculture, the only exception for inclusion is the irrigation pump installation.

Dealing firstly with the exclusion of all plant, machinery and equipment, it is noted that in the case of agricultural properties, movables (including plant and equipment) are frequently included in the sale of such properties, particularly when farms are sold as going concern enterprises.

It follows that where equipment, moveable or immoveable, typically forms part of a sale, the value of the property will be less after the immovable equipment and machinery has been disregarded. For example a dairy farm sale would typically include immovable milking equipment and machinery which, if disregarded, would result in a lower value. i.e. its rateable value would be lower than its typical market value.

Equally, the value of **irrigated lands** which comprise of irrigation mains, infield equipment and pumps, motors and ancillary switchgear and equipment are also typically included as part of a farm sale. If as the Act requires, the Valuer is to disregard all immoveable Plant and Equipment and if, in terms of S1 of the Act, the Valuer is to only value Immoveable Property, then clearly ALL plant, machinery and equipment are to be disregarded in the valuation of property for rating purposes.

It follows that without irrigation equipment, the underlying land is, to all intents and purposes, no longer irrigated and will now fall into an 'irrigable' land category and should be valued as such. The exception to this rule will be lands under flood irrigation where all irrigation infrastructure is of earth or civils.

Irrigable Land is taken to mean land with (water) rights that may be irrigated (potential for irrigation)

Irrigated Land is taken to mean irrigable land with the equipment installed and/or on the farm and which is sufficient and available to irrigate the land (equipment not necessarily in the field but on the farm and in working order – viz draglines).

Type of irrigation system	What is to be valued in terms of S46 3 (b) (v) of	What must be excluded as equipment & machinery
Centre pivot	Irrigation Pump installation	Motor, switchgear and pump foundation; inlet and outlet pipe to pump, Main line to edge of field. Centre pivot and in field mother lines (piping)
Drip irrigation	Irrigation Pump installation	Motor, switchgear and pump foundation; inlet and outlet pipe to pump, Main line to edge of field, Drippers and in field mother lines (piping)
Drag line	Irrigation Pump installation	Motor, switchgear and pump foundation; inlet and outlet pipe to pump from water source to Main line to edge of field Sprinklers, drag lines and in field lines
Water cannon	Irrigation Pump installation	Motor, switchgear and pump foundation; inlet and outlet pipe to pump; Main line to edge of field, Water cannon and in field piping

The retention of the irrigation pump installation in terms of the MPRA may thus seem superfluous as it is not capable, in isolation, of irrigating the land. This is, however, a requirement of the MPRA and Valuers will be required to include pump installations as part of the assessed Market Value.

Plant and Machinery in General

In the agricultural sector, plant &	**Examples per sector of moveable & immoveable equipment/ machinery to be disregarded**	**Improvements not categorised as Equipment but rather as land improvements**
Field Crops	Farm implements Processing and packaging equipment Grain silos Fire fighting equipment	Dams, fences, livestock camp watering systems; silos
Horticulture	Fruit & vegetable sorting equipment, Sugar milling equipment processing and packaging equipment Fire fighting	Tunnels & lighting; dams, fences, silos

In the agricultural sector, plant &	**Examples per sector of moveable & immoveable equipment/ machinery to be disregarded**	**Improvements not categorised as Equipment but rather as land improvements**
Livestock:	Livestock feeding systems Feed bins Processing and packaging equipment Fire fighting equipment	Livestock spray race, loading/handling facilities, cattle crush, dip tank; dams, fences, livestock camp watering systems; silos; stables; racetracks; dressage rings; pigsties; poultry houses
Aqua cultur	Water purification equipment Processing and packaging	Dams, fences.
Api culture	Processing and packaging equipment Fire fighting	Dams, fences.
Forestry	Timber logging and chipping equipment Timber milling equipment Processing and packaging equipment Transport equipment Fire fighting equipment	Dams, fences, fire towers
Viticulture	Cellar plant & equipment	Vine trellises,
Dairy	All dairy parlour equipment; demountable cooler rooms; milk separators; scales; bottling equipment; Air compressors	Dairy parlour buildings

Proposed Guideline #3: Agricultural Properties Farmed in Unity of Use

In assessing the market value of a farm for rating purposes, it must first be established what subdivisions making up the farm in question constitute the farming unit. Secondly, the Valuer must investigate whether a compelling dependency exists between two or more contiguous subdivisions in the successful running of the farm business. Dependencies may include factors such as water, irrigation reticulation, road access, optimising crop or livestock yields, scattered labour housing, particular camp systems and the like. Thirdly, the Valuer should determine whether the farm unit would typically be brought to sale as a 'single' farm property, or whether a breakup of the component parts could yield a higher overall value and that the subdivisions would typically be brought to sale individually rather than as a unit.

It may also be the case that one of the subdivisions falls in the adjacent Municipal Area and that the process of Municipal Boundary Demarcation has overlooked the farm unit dependency/ies. In these cases, the Valuer will need to value the whole farm unit and then make a hypothetical adjustment to the final value so as to exclude the portion outside the Municipal Area in question. Valuers are advised to note such instances and encouraged to inform the Valuer of the adjacent Municipality where a portion of a farm unit is split by Municipal boundaries.

The recording of farm values in the Valuation Roll should be made as a single value against the Farm Unit unless of course individual subdivisions would typically be brought to sale individually. It will be up to the Valuer to cross reference each subdivision making up such a Farm Unit. Individual or pro rata values applied by the Valuer to the separate subdivisions forming part of a single farming unit will, if recorded as such in the Valuation Roll, be construed as having been separately valued.

ANNEXURE J – COMMUNAL PROPERTY VALUATION AND RATING GUIDELINES

VALUATION AND RATING OF COMMUNAL PROPERTY

PURPOSE:

1. The purpose of this guideline is to assist municipalities in the valuation and rating of Communal property within KwaZulu Natal, towards ensuring a consistent and equitable approach to the valuation and rating of communal property in terms of the Local government Municipal Property Rates Act, 2004 (Act No 6 of 2004).

DEFINITION OF COMMUNAL PROPERTY:

2. Unless the context indicates otherwise, "**communal property"** includes:

   (a) Ingonyama Trust land as contemplated in the Ingonyama Trust Act, 1994 (Act No 3 of 1994), excluding:-

      (i) Any land or real right in land contemplated in section (4) of the Ingonyama Trust Act,1994;

      (ii) Any land that is subject to an agreement of lease registered with the Registrar of Deeds; and

      (iii) Any land that is subject to an agreement of lease for a period in excess of 10 years, which is registered with the Ingonyama Trust Board;

   (b) State Trust Land as defined in section 1 of the MPRA, excluding:

      (i) Any land or real right in land for which a certificate has been issued in terms of section 239 of the Constitution of the Republic of South Africa, 1993 (Act No 200 of 1993), as contemplated in item 28 of Schedule 6 to the Constitution of the Republic of South Africa, 1996;

      (ii) Any land that is subject to an agreement of lease registered with the Registrar of Deeds; and

      (iii) Any land tenure rights as contemplated in Schedule 1 and Schedule 2 of the Upgrading of Land Tenure Rights Act, 1991 (Act No 112 of 1991);

   (c) Land registered in the name of a Communal Property Association, as contemplated in the Communal Property Association Act, 1996 (Act No 28 of 1996), excluding any land that is subject to an agreement of lease registered with the Registrar of Deeds; and

   (d) Any other property, regardless of the owner of the property, which:-

      (i) Is a single piece of land;

      (ii) Has more than one residential and non-residential top structures occupied by unrelated occupiers with insecure tenure; and

(iii) Used for communal purposes,

Excluding any land tenure rights as contemplated in Schedule 1 and Schedule 2 of the Upgrading of Land Tenure Rights Act, 1991 (Act No 112 of 1991).

BASIS OF VALUATION:

3. Communal property must be valued in accordance with:-

(a) A multiple-purpose approach to determine which portion of the property is communal property, by:-

(i) Apportioning the market value to the different uses of the property; and
(ii) Applying rates applicable to the categories under the different market value apportionments;

(b) The market value of the communal property on the date of valuation; and

(c) The actual use of the communal property.

Main legislation, principles and policies over ITB property

1. In terms of section 7(1) of the MPRA a municipality must levy rates on all rateable properties in its area.
2. In terms of section 5 of the MPRA a municipal council must annually review and if necessary amend its rates policy which must accompany the municipality's annual budget when tabled in terms of section 16 (2) of the MFMA.
3. In terms of section 15(1)(a) of the MPRA a municipality may in its rates policy exempt rates payments or grant a rebate to a specific category of owners of properties, or the owners of a specific category of properties, including indigent owners.
4. The ITB owns and administers Ingonyama Trust land in terms of the KwaZulu Ingonyama Trust Act, (KwaZulu Act No 3 of 1994) ("ITA").
5. The ITB as an owner is not exempt from the payment of rates in terms of the MPRA.
6. ITB property is mostly used for more than one purpose which is therefore defined as "multiple purposes" in terms of the MPRA. In relation to a property this means the use of a property for more than one purpose.
   6.1. The category of property for property used for multiple purposes must therefore be established in terms of section 9 and 8 (2) (i) of the MPRA.
   6.2. The category of property determined should be in terms of section 9 (1) (c) with the value apportioned and rates determined in terms of section 9 (2).
   6.3. Other property as defined in the MPRA which is identified over ITB property may be recognised for separate rating subject to the MPRA and rates policy criteria and deducted from the primary registered property as recorded in the deeds registry.

7. In terms of section 23 of the MPRA a municipality must draw up and maintain a register in respect of properties situated within that municipality, consisting of part A the valuation roll and part B the relief measures permitted in terms of rates policy.
8. The municipality must in conjunction with the appointed municipal valuer identify and recognise property in terms of the definition of property, based on information from a register which includes the Deeds Office, legal registers of property / property rights or any other information readily available to it.
9. In terms of the MPRA property is defined as –

   9.1. (a) immoveable property registered in the name of a person;

   9.2. (b) a right registered against immoveable property in the name of a person;

   9.3. (c) a land tenure right registered in the name of a person or granted to a person in terms of legislation or;

   9.4. (d) public service infrastructure.

   A property has a corresponding definition of owner in terms of rates liability.

10. In terms of the MPRA a property as defined under paragraphs (a), (b) or (c) is recognised when –

    (a) recorded in a register in terms of –

    (i) the Deeds Registries Act, 1937 (Act No. 47 of 1937); or

    (ii) the Mining Titles Registration Act, 1967 (Act No. 16 of 1967); and

    (b) includes any other formal act in terms of any other legislation to record-

    (i) a right to use land for or in connection with mining purposes; or

    (ii) a land tenure right.

11. A land tenure right, means a land tenure right as defined in section 1 of the Upgrading of Land Tenure Rights Act, 1991 (Act No. 112 of 1990) which reads as follows –

    "(vii) "land tenure right" means any leasehold, deed of grant, quitrent or any other right to the occupation of land created by or under any law and, in relation to tribal land, includes any right to the occupation of such land under indigenous law or customs of the tribe in question."

12. In terms of a land tenure right, under paragraph (c) of the definition of property, ITB land may be allocated to persons and recognised for separate rating over property used for multiple purposes, subject to rates policy criteria, by means of –

    12.1. a lease agreement with the ITB, recorded in the Deeds Registry in terms of the Deeds Registries Act, 1937 (Act No. 47 of 1937);

    12.2. a lease agreement with the ITB, recorded in a register held by the ITB;

    12.3. a deed of grant and recorded in the Deeds Registry in terms of the Deeds Registries Act, 1937 (Act No. 47 of 1937) or in a legal register;

13. In terms of land occupied by indigent owners (land tenure right) over ITB owned property which are developed with an immovable improvement, a threshold value amount should be adopted as a reduction in terms of section 15 (2) of the MPRA, below which no rates are payable.

14. In terms of section 46 (2) of the MPRA under “valuation criteria” the municipal valuer is entitled to identify and value any unauthorised immovable improvement and any unauthorised use as if it were lawful.
15. In terms of rates policy any unauthorised immovable improvement and any unauthorised use over a property used for multiple purposes may be valued by apportionment and rates levied against the underlying registered owner as recorded in the deeds registry office.

ANNEXURE K – MEMORANDUM OF AGREEMENT

MEMORANDUM OF AGREEMENT

ENTERED INTO BY AND BETWEEN

THE UMUZIWABANTU LOCAL MUNICIPALITY

Herein represented by

_____

duly authorised in his/her capacity as

MUNICIPAL MANAGER

by the

UMUZIWABANTU LOCAL MUNICIPALITY

AND

_____

Herein represented by

_____

in his/her duly authorised capacity as

_____

OF

_____

WHEREAS:

A. The Local Government: Municipal Property Rates Act, 2004 (Act No. 6 of 2004) seeks to reform the current system of levying property rates by municipalities and as such introduces fundamental changes in the current system of property rating provided for in the various founding local government legislation;

B. The Act further seeks to enhance certainty, uniformity and simplicity in property rating and to provide local government with a sufficient and buoyant source of revenue necessary to fulfil its developmental responsibilities and ensure economic and financial viability of municipalities without debilitating the poor;

C. The Act requires Municipalities to adopt and implement a policy on the levying of rates on rateable property that is uniformly applicable and consistent with the Act;

D. As a basis for the rates policy, the Act requires a valuation of all properties within a municipality with a view to the compilation of a General Valuation Roll, and section 33 of the Act directs municipalities to designate either one of its officials or a person in private practice as its municipal valuer;

E. To this end the Bid Awards Committee of the Municipality awarded the bid to the Consultant in terms of Bid Number _____ to undertake the services set out in the Act and the bid documentation, both of which form an integral part of this agreement; and;

F. The parties deem it expedient to record the terms of their agreement in writing, in order to establish the framework and conditions on which the Consultant will provide services to the Municipality.

THE PARTIES AGREE AS FOLLOWS:

INTERPRETATION AND DEFINITIONS

1. In this Agreement, unless the context indicates otherwise–

   1.1 an expression, which denotes any gender, includes the other genders, a natural person includes an judicial person and vice versa, and the singular includes the plural and vice versa;

   1.2 clause headings are for convenience only and will not be used in its interpretation, and the following expressions bear the meanings assigned to them and cognate expressions bear corresponding meanings –

   "agreement" means this agreement and all the Annexures thereto;

   "Commencement Date" means a date, which is 10 business days from the date of notification to unsuccessful bidders

   "Consultant" means _____ and its successors-in-title;

"Date of Draft Submission" means the date upon which the Municipality requires the Consultant to submit data relevant to the valuation roll to enable the Municipality to use such data in the preparation of their rates policy and tariffs;

"Date of Final Submission" means the date upon which the valuations to be undertaken by the Consultant are to be handed to the Municipality by the Consultant;

"Date of Valuation" means 1st July 2028;

"Final Delivery Certificate (General Valuation)" means the document issued by the Municipality confirming that the valuation roll has been submitted and certified by the municipal valuer, all known errors and defects have been rectified and that the services and valuations have been rendered in compliance with the Act together with all other terms and conditions of the bid, and after submission of all General Valuation data, documents and information with the close out reports Annexure E and F of the bid documents;

"Municipality" means the Umuziwabantu Municipality;

"parties" means the Municipality and the Consultant;

"services" means the services contemplated in this agreement, including the Bid Documents and the Act;

"the Act" means the Local Government: Municipal Property Rates Act, 2004 (Act No. 6 of 2004); and

"Project deliverables" means the comprehensive work plan and deliverables submitted by the Consultant as contemplated in clause 3 of the Bid specification document and Section N: PRICING-SCHEDULE AND PROJECT WORK PROGRAM of the Bid specification document as attached. The deliverables must be in terms of the Bid document and MPRA;

1.3 words and expressions defined in any sub-clause, for the purpose of the clause of which that sub-clause forms part, bear the meaning assigned to such words and expressions in that sub-clause; and

1.4 this agreement is governed by and construed in accordance with the laws of the Republic of South Africa.

DURATION OF THE AGREEMENT

2. This Agreement commences on _____, and terminates on _____, provided that the agreement may be–

2.1 extended or renewed as contemplated in clause 3; and

2.2 terminated prior to _____ as contemplated in clauses 5, 8, 14 and 15.

EXTENSION AND RENEWAL

3. In the event that the Municipality elects to extend or renew the agreement beyond the period contemplated in clause 2–

3.1 the Municipality must give the Consultant written notice of such proposed extension or renewal, no less than thirty days prior to the termination of this Agreement; and

3.2 the Consultant must give written notice of acceptance or refusal, no later than fifteen days after receipt of the offer contemplated in clause 3.1.

OFFER OF EXTENSION OR RENEWAL

4. Any offer of extension or renewal as contemplated in clause 3, is at the sole discretion of the Municipality, and will be for a period determined suitable by the Municipality.

NOTICE OF TERMINATION

5. The Municipality is not required to give notice of termination of the agreement, provided that the Municipality, in its sole discretion, may terminate the agreement prior to the date contemplated in clause 2, in which event–

5.1 the Municipality must–

5.1.1 give written notice to the Consultant no less than thirty days prior to the date of intended termination; and

5.1.2 as contemplated in this agreement, pay the Consultant any remuneration due for services rendered and reimburse the Consultant for costs incurred up to the date of termination of the agreement; and

5.2 the Consultant must immediately submit to the Municipality all documentation and materials relating in any manner whatsoever to work undertaken as contemplated in this agreement.

DUTIES OF THE CONSULTANT

6. The Consultant must–

6.1 upon signature of this agreement commence rendering the services in terms of the Bid specifications, in terms of industry property valuation standards and in terms of the Municipal Property Rates Act, Act No 6 of 2004;

6.2 prepare such written documentation and accompanying material deemed necessary by the Municipality;

6.3 prepare and submit reports as contemplated in clause 13, and comply with all management systems and further reporting procedures required by the Municipality;

6.4 treat as strictly confidential all information obtained by it during the performance of the service, and may not disclose any such information to any third person whatsoever, either during and after termination of this agreement; and

6.5 immediately notify the Municipality in writing if for any reason it is incapable of performing the service contemplated in this agreement, specifying alternative or remedial steps to be taken, which may include termination of the agreement in whole or in part.

TAXATION

7. Any required income tax or other taxation payments required by law are the responsibility of the Consultant and the Municipality will not deduct any income tax or other taxation from any payments due to the Consultant.

DUTY OF LOYALTY AND CONFIDENTIALITY

8. The Consultant understands and agrees that it owes a duty of loyalty and confidentiality to the Municipality and any breach of such duties will, notwithstanding the provisions of clause 14, be grounds for immediate termination of this Agreement without notice to the Consultant.

DUTIES OF THE MUNICIPALITY

9. The Municipality must–

    9.1 provide such assistance as is reasonably required by the Consultant to carry out the service;

    9.2 in order to avoid delays, consider documents, accompanying material and information supplied by the Consultant and take decisions related thereto, within a reasonable period;

    9.3 issue all instructions or requests related to the service through the Consultant; and

    9.4 remunerate the Consultant for the service rendered as contemplated in clauses 10 and 11.

REMUNERATION OF THE CONSULTANT

10. The Municipality must remunerate the Consultant as contemplated in this agreement based on the submitted quotation Section N (table 1) of the bid and the priced work program (table 2) of the bid, and it is agreed that the price for the provision of the service, will be the sum of **R**_____

(_____**)**
inclusive of VAT and any and all disbursements.

PAYMENTS

11. Payment must be made directly to the Consultant upon completion of the services, and within thirty days of receipt by the Municipality of a detailed invoice, provided that the Municipality may refuse to make any payment–

    11.1 in the event that the Municipality, in its sole discretion, is of the opinion that the Consultant has not performed the services as contemplated in this agreement; or

    11.2 for as long as any report contemplated in clause 13 and any deliverable contemplated in the Bid specification document remains outstanding.

OWNERSHIP OF DOCUMENTS AND MATERIALS

12. All documents and materials produced by the Consultant as contemplated in this agreement are, and will remain the sole property of the Municipality, including any data

and information, in whatever manner or format, whether hard copy, digital, video tape, audio tape, or otherwise, provided that–

12.1 the Consultant must furnish a hard copy and electronic copy of the final report, software or similar document to the Municipality;

12.2 the Municipality reserves the right to make reports, plans, software or similar documents received by it as part of this agreement available to the public free of charge; and

12.3 the Consultant may not make any software or other intellectual product or document available to any person or entity without the express, prior, written authority of the Municipality, which permission may not be unreasonably withheld.

REPORTING TO THE MUNICIPALITY

13. The Consultant must provide the Municipality with–

13.1 written monthly progress reports within ten days of the end of each month; and

13.2 written close out reports in terms of the bid and bid specifications within ten days of completion of the service;

13.3 a final written close-out report within ten days of the completion of the service.

BREACH OF AGREEMENT

14. If either party fails to meet its obligations in terms of this agreement, the innocent party, at its choice, and after giving seven days' written notice to the defaulting party at its *domicilium*, calling on the latter to remedy the breach, may–

14.1 terminate the agreement; or

14.2 enforce the terms of the agreement; and

14.3 in any event claim any damages that it may have suffered as a result of the breach.

TERMINATION

15. The Municipality may, at its sole discretion, and after three days' written notice to the liquidator, judicial manager or Consultant, as the case may be, terminate the agreement in the event that–

15.1 an application is lodged for the liquidation of the Consultant;

15.2 the Consultant reaches a compromise with any of its creditors; or

15.3 the Consultant is placed under judicial management.

OBLIGATIONS OF THE MUNICIPALITY

16. Should the agreement be terminated for any reason whatsoever, the Municipality will not incur any obligation to the employees of the Consultant, nor in respect of any contracts concluded by the Consultant arising from this agreement.

DISPUTE SETTLEMENT

17. Either party to the agreement may, in the event of any dispute arising out of the agreement, refer the dispute for arbitration in terms of the Arbitration Act, 1965 (Act No. 42 of 1965), provided that the arbitration so contemplated will take place in Pietermaritzburg.

ARBITRATOR

18. The parties must agree on an Arbitrator within thirty days after a dispute has been declared, failing which either of the parties to the dispute may request the Chairperson of the KwaZulu-Natal Law Society to appoint a suitable Arbitrator.

REFERRAL TO COURT

19. The agreement to refer disputes for arbitration does not bar either of the parties to refer any dispute between them for adjudication by any court with jurisdiction, provided that seventy two hours' notice must be given to the other party prior to such referral.

DOMICILIUM AND NOTICES

20. The parties choose their *domicilium citandi et executandi* for all purposes of the giving of any notice, the payment of any sum, the serving of any process and for any other purpose arising from this agreement, as follows:

The Municipality: _____
_____
_____
Facsimile: _____

The Consultant: _____
_____
_____
Facsimile: _____

VARIATION TO *DOMICILIUM*

21. Either party may from time to time, and upon written notice to the other party, vary its physical address or facsimile number to any other physical address or facsimile number within the Republic of South Africa.

NOTICES

22. Any notice given by either party to the other party, which –

22.1 is delivered by hand during the normal business hours of the addressee at the addressee's *domicilium* will be deemed to have been received by the addressee at the time of delivery;

22.2 is posted by prepaid registered post from an address within the Republic of South Africa to the addressee at the addressee's *domicilium* will be deemed to have been received by the addressee on the seventh day after the date of posting; and

22.3 is sent by facsimile copier during the normal business hours of the addressee to the addressee's *domicilium* will be deemed to have been received on the date and time of successful transmission thereof.

DUE CARE AND DILIGENCE

23. The Consultant, including any person acting for on behalf of the Consultant, must exercise due care and diligence in the performance of its duties as contemplated in this Agreement and the Consultant will be liable to the Municipality in the event that it fails to exercise such due care and diligence.

CAPACITY OF THE CONSULTANT

24. The Consultant, including any person acting for or on behalf of the Consultant, acts as an independent contractor and not as an agent or employee of the Municipality, and has no authority or right to bind the Municipality.

INDEMNITY

25. The Consultant hereby indemnifies and holds the Municipality harmless against any and all claims of any nature whatsoever, arising out of the wilful or negligent acts or omissions of the Consultant, and the Consultant hereby warrants that it carries sufficient insurance to cover any such claims.

SOLE RECORD

26. This agreement, together with its appendices, constitutes the sole record of the agreement between the parties in regard to its subject matter, and neither party will be bound by any representation, express or implied term, warranty, promise or the like not recorded herein, or reduced to writing and signed by both parties.

VARIATION

27. No variation, modification, addition, alteration, erasure or abandonment of any clause of this agreement or consent to deviation from the agreement will be valid unless such variation, modification, addition, alteration, erasure or abandonment of any clause of this agreement or consent to deviation has been recorded in writing and has been signed by both parties, provided that any such variation, modification, abandonment or deviation will be valid only for a specific case and for the purpose for which and to the extent, which it was made for or given.

GRACE

28. No grace, delay relaxation, leniency or indulgence granted by the Municipality to the Consultant will be deemed to be an abandonment of any right by the Municipality contemplated in this agreement, and any such grace, delay, relaxation, leniency or indulgence will not prevent the Municipality from insisting on strict future compliance by the Consultant with all the terms and conditions of this agreement.

SEVERABILITY

29. Each clause of this agreement is severable from each of the other clauses and if any clause in this agreement is found to be void, invalid or unenforceable for any reason, the remaining clauses remain in full force and effect.

SUCCESSORS-IN-TITLE

31. The provisions of this agreement will be binding upon the successors-in-title of the parties, and the rights and obligations of each party arising out of or pursuant to this agreement will devolve upon and bind its successors-in-title.

CESSION

32. The Consultant may not cede, assign, transfer or otherwise make over any of its rights or obligations contemplated in this agreement.

COSTS

33. Each party will bear its own costs of and incidental to the negotiation and preparation of this agreement, provided that any costs, including attorney and own client costs and collection commission, incurred by the Municipality arising out of a breach of this agreement will be borne by the Consultant.

SIGNED AT _____ ON THIS THE ____ DAY OF _____ 20….

AS WITNESSES:

1. **_____**

_____
THE CONSULTANT

2. **_____**

SIGNED AT _____ ON THIS THE ____ DAY OF _____ 20….

AS WITNESSES:

1. **_____**

_____
THE MUNICIPALITY

2. **_____**

ANNEXURE L – BID EVALUATION CRITERIA

ANNEXURE "L" – EVALUATION CRITERIA

1. Basis for functionality evaluation

a) Resources –
- Municipal Valuer
- Assistant Municipal Valuer
- Other relevant resources

b) Bidders experience

c) General Valuation Project methodology

d) Quality assurance plan

e) MPRA, Mass Valuation (CAMA) and preparation of valuation rolls experience

f) Valuation Roll Management System – functional and licenced

g) Skills transfer plan

See attached functionality evaluation schedule below.

Note: Bidders must note that a Service Level Agreement will have to be concluded with the successful bidder.

2. Functionality assessment criteria

Points for functionality will be determined in relation to the bidder's ability to meet the terms of reference as set out in this bid document and allocation points for functionality is as follows:

ITEM	FUNCTIONALITY	POINTS
A. RESOURCES AND EXPERIENCE		
1. Municipal Valuer must comply with Section 39 (1) of the MPRA	Registered as a professional valuer or professional associated valuer (with no restrictions) in terms of the Property Valuers Profession Act, 2000 (Act No. 47 of 2000 with experience as a municipal Valuer for – Less than 3 years = 0 points 3 - 5 years = 3 points 6 and above = 5 points To attach proof of the years registered with SACPVP	5
2. Experience as municipal valuer	Certified copy of designation as a municipal valuer from previous appointments of completed General Valuation (GV) projects – 0 GV Projects = 0 points 1 to 3 Completed GV Projects = 5 points 4 or more Completed GV Projects = 10 points	10

ITEM	FUNCTIONALITY	POINTS
A. RESOURCES AND EXPERIENCE		
3. Bidders experience in carrying out a General Valuation and preparing valuation rolls for rating purposes in terms of the MPRA	Proof of supporting evidence by a letter of reference confirming successful completion of a General Valuation and preparing valuation rolls (GV Projects) **from a local or metropolitan municipality with a similar or greater count of roll records** – 0 GV Project = 0 points 1 to 3 GV Projects = 10 points 4 to 7 GV Projects = 15 points 8 or more GV Projects = 20 points	20
4. Municipal Valuer experience in processing objections and defending appeals to valuations	Proof of supporting evidence by a letter of reference confirming successful completion of General Valuation objections and appeals as the designated municipal valuer **from a local or metropolitan municipality with a similar or greater count of roll records** – 0 GV Project = 0 points 1 to 3 GV Projects = 5 points 4 or more GV Projects = 10 points	10
5. Skills transfer and municipal capacity building	Provision of a detailed skills transfer and capacity building plan for the duration of the bid contract Trade references from a local or metropolitan municipality confirming successful skills transfer and capacity building programs on a general valuation (GV) project – 0 references = 0 points 1 to 3 references and a skills transfer plan = 3 points 4 or more references and a skills transfer plan = 5 points	5
A - Total		**50**

ITEM	FUNCTIONALITY	POINTS
B. PROJECT METHODOLOGY AND SYSTEMS		
1. General Valuation Project plan and implementation methodology	The bidder must provide a general valuation project plan and implementation methodology which must cover the following topics and activities – Property register preparation = 2 points Data collection = 2 points Sales analysis and market reports = 2 points Valuation of property = 3 points GV Project management = 2 points Objections and Appeals = 2 points Stakeholder engagement = 2 points	15

ITEM	FUNCTIONALITY	POINTS
B. PROJECT METHODOLOGY AND SYSTEMS		
2. Quality Assurance (QA) Project methodology and plan	Provision of a Quality Assurance (QA) implementation Plan with project phase details and process flow to include – Property register / Valuation roll = 2 points Data collection/Capture (QA) = 2 points Sales review (QA) =2 points Value review (QA) =2 points	8
3. Valuation Roll Management System (VRMS)	Bidders Valuation Roll Management System (VRMS) licenced, functional and operational as per bid and bid specification. a. Trade references from a local or metropolitan municipality confirming successful VRMS system implementation, operational and functionality for General Valuations and in the updating of the valuation rolls – 0 references = 0 points 1 to 3 references = 10 points 4 or more references = 20 points	20
4. CAMA modelling projects - Development of CAMA models to support mass valuations	To submit CAMA modelling evidence in the form of statistical reports and CAMA models of previous projects where CAMA modelling was performed by the bidder. 0 CAMA modelling projects = 0 points 1 to 3 CAMA modelling projects = 3 points 4 or more CAMA modelling Projects = 7 points	7
B - Total		**50**

Total Functionality Points for this bid is A + B = 100 points

Minimum score to qualify on functionality is 70 points
The municipality may invite bidders who satisfy the qualifying criteria to make a presentation to their committee to support the bid evaluation.

The evaluation of the presentations will be in terms of the criteria and includes the following -

a) An evaluation of the bidder's understanding of the Local Government: Municipal Property Rates Act, No 6 of 2004,

b) An overview of the proposed work program and resources as per the bid submission to deliver a certified general valuation roll and to prepare supplementary valuation rolls for the maintenance period, including quality assurance methodology and plan;

c) An overview of the proposed work program with specific reference to the cash flow requirements to achieve key deliverables within the required time frames;

d) A practical demonstration of the Valuation Roll Management System (VRMS) to show proof of ability and functionality to capture, store and maintain data and to support the functions of the municipal valuer as specified in the Bid;

e) A brief overview of the proposed skills transfer program contained within the bid submission;

f) Understanding and identification of critical risks and vulnerabilities associated with the proposed project within the Municipality.

3. Information required for evaluation / assessment of proposals

- The name of the consultancy
- The CVs and competence of professionals who will be involved in the project and details of any relevant experience in similar work.
- A clear identification of specialists to be employed in the project and their roles and responsibilities.
- Demonstrable track record of experience and expertise in similar projects;
- Understanding of the key issues outlined in the brief;
- The methodology and procedures effectively to achieve the project objectives.
- An outline of the work programme, key stages and schedule of activities based on meeting the deadline set including details of how and when the client will be kept informed of progress.
- A cost breakdown for undertaking the work – reference to Section “N” of the Bid quote document, table 1 and table 2 which must both be fully completed and reconciled to each other.

4. Project Cost

A detailed project costs breakdown including other relevant costs associated with the project should be provided which must comply with supply chain management pricing requirements and Section “N” tables 1 and 2 completed and submitted.

5. Bid Rating

For Bidders to be considered for the next phase of evaluation, a minimum of 70% (points) under functionality must be achieved thereafter the Municipality will refer the bids for further evaluation as per its supply chain management process. It should be noted that the Municipality is not obliged to appoint the Bidder obtaining the highest points in terms hereof.

6. Preference Point Claim

The Preferential Procurement Regulations, 2022 pertaining to Preferential Procurement Policy Framework Act, no 5 of 2000 and its associated regulations will apply accordingly when awarding points for B-BBEE status level of contribution. Preference points claim will be allocated in accordance with the minimum requirements of MBD 6.1.

7. Declaration of Bidder's Past Supply Chain Management Practice

Bidders must complete the form MBD 8 & 9 which follows form MBD 6.1.

8. Tendering Procedures

The bid will be evaluated based on the criteria stated above and thereafter preferential point system shall apply. Detailed proposals must be forwarded to the Umuziwabantu Municipality: 10 Murchison Street and be deposited in the tender box provided at the Reception Area, 10 Murchison Street clearly endorsed **"Bid number: UMUZ/13/2026 – GENERAL VALUATION AND PREPARATION OF THE VALUATION ROLL FOR IMPLEMENTATION 1 JULY 2028 AND PREPARATION AND UPDATING OF VALUATION ROLLS FOR THE PERIOD 1 JULY 2028 TO 30 JUNE 2033,** by no later than 12H00 on 27 November 2026 where bids will be opened in public.

The Umuziwabantu Local Municipality does not bind itself to accept the lowest or any bid. The Council reserves the right to accept a bid as a whole or a portion thereof.

Prospective service providers are required to submit proposals with quotations in hard copy and no e-mailed or faxed proposals shall be accepted.

9. FORMAL PRESENTATIONS

Please note that the presentations may be requested by the Umuziwabantu Local Municipality at their discretion.

ANNEXURE M – GUIDANCE MARKET REPORT FORMAT AND CONTENT

GUIDANCE MARKET REPORT FORMAT AND CONTENT

Introduction

The purpose of this guidance is to provide a standardised framework for the reporting of the valuation methodology, practices, analysis, and conclusions in the determination of market value in terms of the municipal property rates act (MPRA) and applicable standards. A standard market report provides the opportunity for the municipal valuer to present the general valuation market analysis and conclusions to the client (municipality) and other key stakeholders such as ratepayers, valuation appeal boards and CoGTA, in support of the defence of the determined market values as stated on the valuation roll.

The municipal valuer may add, expand, and customise the market report depending on the location of the municipality, the property market, the property use, and the categories of property adopted by the municipality.

The preparation and delivery of a market report is specified in the general valuation bid specification document and this guidance serves to augment these specifications.

FORMAT AND MINIMUM CONTENT OF A MARKET REPORT

1. Title page

2. Table of contents

3. Instruction and purpose of the brief and valuation

4. Name of municipality

5. Name of municipal valuer

6. Date of appointment of municipal valuer

7. Date of valuation

8. Date of valuation roll implementation

9. Valuation methodology – describe and document the valuation methods and practices applied in the general valuation which must include data collection and data capture methodology for the minimum identified property sectors below –

a. Residential (Full Title FT OR Sectional Title ST)

b. Income producing property (Industrial, Business, Commercial, Residential, etc)

c. Agricultural

d. Specialised (Actual Use) - (Hotels, Hospitals, Schools, Casinos, Airports, Mining, etc. – Valuation methodology to be documented for each property type valued individually (ie valued by NON-CAMA methodology).

e. Vacant Land

f. Public Service Infrastructure (PSI)

10. **Market Report Document** – to include fully motivated report for each property sector covering the respective broad economic and property market conditions within the designated locality (neighbourhood/homogeneous area). Further the market report must include the provision of researched Sales per property sector and tabulated into valid and invalid sales, together with Income, Expense and Cost data with the conclusions and determined market rate RANGES per unit of comparison associated with each property sector within the locality (neighbourhood / homogeneous area).

    The market report to include a cost report of primary building types within the municipality and their market costs rates per square metre as at the date of valuation. The cost rates to be applied in the Cost approach method of valuation. The cost market report must be prepared and certified by a registered professional quantity surveyor in consultation with the designated municipal valuer.

    Guideline report tables are provided under Annexure B as support in preparing a market report for each property sector below.

    a. Residential property – Sales data and market rates
    b. Non-residential income producing property – Sales data and market rates
    c. Non-residential income producing property – Income / expense data (rental income, cap rates, expenses, etc)
    d. Non-residential agricultural property – Sales / Cost data and market related land use rates
    e. Non-residential specialised property – Cost data and market rates
    f. Vacant Land based on zoning and highest and best use – Sales data and market rates
    g. Public service infrastructure – Cost data and applicable rates.

11. **Computer Assisted Mass Appraisal (CAMA) reporting** – CAMA techniques and reporting should be guided by International best practice. The Technical Standards of the International Association of Assessing Officers (IAAO) offer the most comprehensive mass appraisal best practice and reporting which includes sales ratio studies and reporting.

    Δ Guidance note:

    If the municipal valuer decides that the application of CAMA techniques is unsuitable for the valuation of a grouping of properties within the municipality, then the alternative approach available is to value each property individually. Irrespective of the property use or category, where a property is valued individually a separate valuation template must be prepared and submitted for each property, with the final certified valuation roll and showing the method, value calculations, motivations and conclusions in arriving at a market value.

12. **A Sales GIS Spatial layer (Shape File format)** should be prepared of all sales and delivered as part of the market report and reference the designated market areas (neighbourhood) spatially.

13. **Valuation roll certification page** signed and dated by the municipal valuer.

14. **Proof of the certified roll submitted to the municipal manager** by signed and dated acknowledgment of receipt letter.

15. Copy of the municipal valuer designation letter issued by the municipality.

ANNEXURES FOR A MARKET REPORT

A. DATA COLLECTION FORMS PER PROPERTY TYPE

a. Residential property (Full title and Sectional title)
b. Non-residential income producing property
c. Non-residential agricultural property
d. Non-residential specialised property – (Individual by property type)
e. Vacant Land
f. Other property types not listed

B. SPECIMEN TABLES TO SUPPORT THE MARKET REPORT

The determined market rate RANGE per unit of comparison must be provided in a tabular format for ease of reference – refer to examples / specimen tables below. The market rates and data must be determined from the property market and by market analysis. To note that the populated Template "D" sales report per property sector per homogeneous area / neighbourhood must be submitted in addition to the market report and in terms of the Bid specifications.

Note:

- For MARKET INCOME DATA such as rentals, cap rates, vacancies and associated markets rates per GBA/GLA, use specimen table **(ii)**,
- For HOTELS use specimen table **(iii)**,
- For SERVICE STATIONS, use template **(iv)** and,
- For all other Market Rates by Property Sector type, use specimen table **(i)** directly below.

(i) MARKETS RATES BY PROPERTY SECTOR TYPE:

a) Residential (Full Title FT OR Sectional Title ST)
b) Income (Industrial; Business, Commercial and Rental Residential Properties)
c) Agricultural
d) Specialised (Actual Use)
e) Vacant Land
f) Public Service Infrastructure (PSI)

- **PROPERTY SECTOR:** [select from above list] ……

#	Locality Cluster	Neighbourhood / Market Area	Nbhd / MA Code	Property Type Code	Property Type Description (Primary Building use / Land use)	Unit of Comparison (from guideline below)	Market Rates Rate per GBA or Land Size	
							Min	Max

(ii) MARKET INCOME DATA - RATES BY LOCALITY CLUSTER AND USE

#	Locality Cluster	Neighbourhood / Market Area	Nbhd / MA Code	Property Type Code	Property Type Description (Primary Building use)	Market Rentals (R/m²)			Vacancies (%)		Cap Rate (%)		Sales Market Rates Rate per GBA / GLA	
						1-100m²	101 – 1000m²	1001-3000m²	Min	Max	Min	Max	Min	Max

(iii) HOTELS

#	Locality Cluster	Hotel Name	Grade / Quality	Number Rooms	Ave Daily Room Rate (ADR)	Occupancy Rate	Revenue per available room (RevPar)	Cap Rate	Sale Price	Market Value	Value / Room	Comment

(iv) SERVICE STATIONS

#	Locality Cluster	Volumes (KL) Thru-Put per month		Forecourt Rental (% Margin)	Comment
		Min	Max		

(v) COST DATA - MARKET NORM RATES BY USE

#	Primary Building Use	Building Description	Construction Grade / Quality	Cost Rates			Comment
				Min	Max	Average	
1	Residential	Single Story Housing – 1 Bedroom	Low Cost				
2	Residential	Single Story Housing – 2 Bedroom	Low Cost				
3	Residential	Single Story Housing – 2 Bedroom	Low Cost				

GUIDELINE - VALUE UNITS OF COMPARISON

To assist in the preparation of the valuation methodology and market report, the following is a summary of the main value units of comparison applied by the valuation industry in valuations and to compare market related information in valuation review and quality assurance decisions.

Property type	Typical Methodology	General Units of comparison
Residential		
Residential houses	Direct Sales	Sales prices paid, rates/m² GBA
Residential Sectional Title units	Direct Sales	Sales prices paid, rates/m² GBA
Vacant Residential Land	Direct Sales	Sales prices paid, rates per m²/Ha
Non Residential		
Commercial or Industrial	Income Approach	Rentals, Cap rates, expenses, vacancies
Sectional Title Shops, offices, industrial properties	1. Direct Sales; 2. Income approach	1. Rate/m² GLA and Sales prices paid; 2. Rentals, Cap rates, expenses, vacancies
Vacant Commercial Land	Direct Sales	Rate/m² site or potential realisable bulk development
Vacant Industrial Land	Direct Sales	Rate/m² plat-formed area
Specialised Properties		
Shopping Centre	Income Approach	Rentals, Cap rates, expenses, vacancies, sales prices paid
Hospital	Income approach supported by the Cost approach: considering depreciation physical, functional, and economic obsolescence.	Rentals, Cap rates, expenses, vacancies; Replacement Costs, physical depreciation, functional limitations, external economic limitations and land values
Airport	Income approach supported by the Cost approach: considering depreciation physical, functional, and economic obsolescence.	Rentals, Cap rates, expenses, vacancies; Replacement Costs, physical depreciation, functional limitations, external economic limitations and land values
Casino	Income approach supported by the Cost approach: considering depreciation physical, functional, and economic obsolescence.	Rentals, Cap rates, expenses, vacancies; Replacement Costs, physical depreciation, functional limitations, external economic limitations and land values

Property type	Typical Methodology	General Units of comparison
Heavy Manufacturing and Engineering	Cost approach: considering depreciation physical, functional and economic obsolescence.	Replacement Costs, physical depreciation, functional limitations, external economic limitations and land values
Hotel	Profits	Occupancy rates, Ave daily room rates (ADR), financial statements revenue, gross/net margins, sales, Revenue per available Room (RevPAR).
Petrol Filling Station (Service Station)	Income approach and profits	Rentals, Cap rates, expenses, vacancies, Forecourt Rental (% Margins) and Volumes of thru-put literage
Police Station	Cost approach: considering depreciation physical, functional, and economic obsolescence.	Replacement Costs, physical depreciation, functional limitations, external economic limitations and land values
Schools	Cost approach: considering depreciation physical, functional, and economic obsolescence.	Replacement Costs, physical depreciation, functional limitations, external economic limitations and land values
Agricultural Property	To be valued with reference to the guidelines adopted by the SAIV and profession for the valuation of agricultural properties	Typically, as a farming unit on rates per hectare however taking account of the various land uses and MPRA exclusions

CERTIFICATE OF ATTENDANCE AT CLARIFICATION MEETING

This is to certify that:_____ (tenderer)

of _____ (address)

_____

was represented by the person(s) named below at the compulsory clarification meeting held for all tenderers at Umuziwabantu Municipality, in Harding Offices

on _____**2026** starting at _____.

We acknowledge that the purpose of the meeting was to acquaint ourselves with the Site of the works and / or matters incidental to doing the work specified in the tender documents in order for us take account of everything necessary when compiling our rates and prices included in the tender.

Particulars of person(s) attending the meeting:

Name _____ Signature _____

Capacity _____ Date & Time _____

Attendance of the above persons at the meeting is confirmed by the Employer's representative, namely:

Name _____ Signature _____

Capacity_____ Date & time _____

Official Stamp

