



Getting your business to BEE compliant



APPLICATION FORM

To be completed by representative of Measured Entity. **Please CHECK ALL DETAILS on the form & sign where necessary**

CONSULTING SERVICES

Please indicate (X) your requirements where applicable

Once Off BEE Strategy Plan - We help you to formulate a BEE Strategy as once off product		Monthly BEE Strategy Planning - Monthly Retainer – We help you to formulate a BEE Strategy and we will assist you with implementation thereof on a monthly basis and assist with the verification process	
Post Verification Gap Analysis - We examine your current BEE score and highlight gaps to improve your score		BEE Training Workshops - Our Technical Experts will train your team on all aspects related to the Amended Codes/Sector Codes and other BEE related matters.	
		Verification File Preparation - We prepare an electronic file for your BEE Verification Agency on the BEE Trax system	
BEE Scenario Planning - We complete an in depth analysis of your current score, identify initiatives which, if implemented, could lead to the achievement of a specific level of compliance & score during the current financial period		Desktop Assessment - We conduct an analysis of your rating based on information provided which is deemed at face value to be correct. This process will NOT result in a BEE certificate that may be used in the normal process of proving compliance. This does not guarantee a final outcome in terms of compliance.	

(Please complete the missing information below and verify the information is correct)

Organisation Registered Name					
Trading Name					
Industry Sector					
Audited financial period to be measured					
VAT Number:					
Physical Address (Primary site)					
Company Registration Number				Postal code	
Contact Person			Position		
Tel			Email		
Cell			Fax		
Estimated Annual Turnover			Total Managers		Total Employees
Number of Sites (Other than Head Office?)			Type Of Company	Sole Prop	CC
					Pty (Ltd)

(Please indicate (X) or complete the relevant information where applicable)

Ownership

(Black is defined as African, Indian, Coloured & Chinese South African citizens)

Number of black owners?	
Percentage Black Ownership?	
Trusts?	
Percentage of black beneficiaries in the Trusts?	

BEE SERVICE OPTIONS	Months / Hours	Quoted Cost per month		Confirm
		INCL VAT	EXCL VAT	
CONSULTING PRODUCT				<input type="checkbox"/>

REQUIREMENTS:
The completion of this process requires a high degree of interaction between **BEE COMPLIANCY** and the Measured Entity. Please build this in to your time frames. Once this Quotation has been signed, we will send you a list of all the required information for the Consulting product.

TERMS & CONDITIONS:

- Prices are quoted **EXCLUSIVE of VAT**.
- The price quoted includes travel costs.
- Cost estimate is valid for 28 days from the day of sending of the Quotation.
- Should the service be cancelled after formal approval has been given, **the client forfeits the 50% deposit** (applicable to all once off consulting products).
- Should the terms of contract not be exercised by the client within **two** months of signing the Quotation, which prevents the service process from being undertaken, the contract will be cancelled.
- The client is obliged to give **BEE COMPLIANCY** one month's written notice should you wish to cancel the **monthly consulting**.
- All invoices to be paid by invoice due date *and prior to the issuing of the report to the Measured Entity*.
- The Quotation has been prepared based on information provided by the Measured Entity. Should the Quotation be based on inaccurate information supplied by the Measured Entity, **BEE COMPLIANCY** reserves the right to adjust the quoted price for the project to fall in line with **BEE COMPLIANCY** standard pricing structure.
- Signing this Quotation binds to payment terms as well as supplying all information that is requested to conduct the Service.
- In signing this Quotation, you also sign an acknowledgement that your BEE product remains the property of **BEE COMPLIANCY**

THE CONSULTING PROCESS:

Supply and receive back quotation documentation signed.
 Sign the Service Level agreement
 Allocated consultant will make contact to set a meeting or inform client of information needed to continue with product
 Agree on timelines and Client's BEE objectives
 Once objectives are met, consultant will prepare and submit report for review.
 Draft report sent electronically, client invoiced final balance paid.
 Final report sent to client electronically.

Monthly Consulting Deliverables

BEE Strategy Planning

- Initial project meeting
 - Discuss information requirement for all 5 elements and agree on initial timelines
 - Discuss required level of compliance for short and long term strategy
 - Discuss client specific scenarios
- Confirmation of validity of information on hand from Client
 - Verify the validity of the required data from all stakeholders for all 5 elements
 - Facilitate the updating of information on each element on a monthly basis
 - Analyse the data and interpret the level of compliance based on information received and update reports
- Monthly feedback analysis. This will commence once all the initial information is received from Client. If the initial data is the same as the verification data these reports can be prepared sooner
- Discuss each element of the scorecard and identify opportunities to improve the scores in the most cost effective manner.
- Client offers comments, queries or changes to the draft analysis before finalising
- Final analysis, upon which either a meeting or teleconference will be held with stakeholders to discuss the report and resolve queries.

Verification Preparation

- Annual Verification preparation will be undertaken and BEE COMPLIANCY will advise with regard to the appointment of a BEE Verification Agency and will be managed by BEE COMPLIANCY based on the proposed project timelines of the verification agency.
- The electronic data will be available for submission (BEE COMPLIANCY will submit it in excel format to the verification agency) and the consultant will facilitate the preparation of the evidence files immediately upon receipt of the sample requirements from the verification agency.
- Assist with facilitating the verification process and prepare Hard copy files, if required by the Verification agency
- Assist with Non Conformances raised by the Verification agency

Employment Equity:

- Electronic data will be assessed as supplied by the client, meetings will be held with the client to assist with the checking of the EEA2 & EEA4 reports
- Ensure Management are classified correctly according to BBBEE codes
- Review information uploaded for WSP and ATR

Technical Queries:

Attend to any technical or other queries from the Client throughout the month.

DECLARATION & APPROVAL:

I understand that the information provided herein is the basis for any offer of engagement and quoted price made by **BEE COMPLIANCY** and that any material changes to this information will result in an adjustment of fees accepted. I further confirm the information contained herein is correct according to my knowledge as is a true reflection of the current scenario and that **BEE COMPLIANCY**, to the best of my knowledge, have undertaken to in no way contravene the impartiality principles through our verification relationship. I further confirm my authority to sign on behalf of the Measured Entity.

Name:

Signature:

Capacity:

Date: