



CALL FOR THE SELECTION OF A SERVICE PROVIDER / CONSULTANT FOR ACCOUNTING, TRUST ADMINISTRATION, TAX AND COMPLIANCE SERVICES FOR THE RECYCLING COMMUNITY TRUST

Purpose: AFD Grant Closure Activities

Proposed engagement period: To be confirmed

Submission deadline: September 5th 2026

About Oxfam South Africa

Oxfam South Africa is a social justice organisation, working at the intersection of poverty and inequality. Oxfam is driven by the belief that South Africa has the potential to become a fair and just society and to stand for the same in the world. Established in 2014, Oxfam South Africa is the first autonomous member of Oxfam International in Africa. Visit www.oxfam.org.za

Background and Purpose of the Assignment

As part of the activities required for the orderly closure of the AFD grant, Oxfam South Africa is seeking to appoint an experienced accounting, tax, compliance and trust administration service provider to support the Recycling Community Trust (the Trust).

The assignment will focus initially on reviewing and regularising the Trust's current legal, financial, tax and statutory compliance position, addressing any outstanding obligations and putting in place appropriate accounting, governance, reporting and compliance arrangements for the future.

The service provider will work in coordination with the Trustees and OZA, recognising that the Trustees are responsible for the governance of the Trust, while OZA will manage the contractual and payment arrangements for the service.

Previous Procurement Process

A similar procurement process was initiated in early 2025. However, the process was not formally concluded and no consultancy agreement was ultimately executed due to internal circumstances. This new ToR supersedes the previous process and is intended to restart the procurement process in full, with all suitably qualified service providers invited to submit proposals in accordance with the applicable OZA procurement requirements.

Scope of Work

The selected service provider will be expected to provide the following services, as applicable to the Trust:

Review of the Trust's Current Status

Conduct a review of the Trust's current legal, financial, tax and statutory compliance status, including available records, registrations, filings, accounting information and governance documentation.

Outstanding Statutory and Regulatory Obligations

Identify all outstanding statutory, tax, regulatory and other compliance obligations of the Trust and advise on the actions, documentation and submissions required to regularise the Trust.

Tax Compliance and Regularisation

Review the Trust's tax status and outstanding obligations and provide support, as required, with:

- tax registrations;
- income tax returns;
- provisional tax returns;
- beneficial ownership submissions;
- any outstanding declarations or returns;
- any other tax-related submissions required to bring the Trust up to date; and
- clarification of any outstanding tax compliance matters identified during the review.

Accounting and Financial Records

Review the Trust's existing accounting records and establish or update appropriate accounting records and procedures, including:

- bookkeeping;
- supporting accounting documentation;
- bank reconciliations;
- recording and classification of transactions; and
- any other accounting records required for the proper administration of the Trust.

Financial Reporting

Assist with the preparation of appropriate financial reports and, where applicable, annual financial statements and other financial information required for the Trust's ongoing administration, reporting and compliance obligations.

Trust Administration and Governance Support

Provide guidance on the administrative requirements of the Trust and assist, where required, with:

- preparation of Trustees' meeting documentation;
- resolutions;
- minutes;
- statutory and governance records; and
- other documentation required to support the proper administration and governance of the Trust.

Ongoing Compliance Framework

Recommend and, where agreed, establish a practical compliance calendar and process covering:

- statutory filings;
- tax submissions;
- accounting activities;
- governance requirements;
- annual and recurring compliance obligations; and
- relevant deadlines and responsibilities.

The objective will be to ensure that the Trust has a clear and practical system for maintaining compliance after completion of the initial regularisation work.

Advisory Support

Provide accounting, tax and compliance advice to the Trustees and OZA in relation to the Trust's ongoing obligations and the implementation of the recommendations arising from the initial review.

Expected Deliverables

The selected service provider will be expected to deliver, as applicable:

1. An initial assessment of the Trust's current legal, financial, tax and compliance position.
2. A clear list of outstanding statutory, tax and regulatory obligations and the actions required to regularise the Trust.
3. Preparation and/or submission of outstanding declarations, returns, registrations and other statutory or regulatory filings, as agreed with the Trust and OZA.

4. A review and, where necessary, update of the Trust's accounting records and financial administration arrangements.
5. Appropriate financial and management reporting arrangements for the Trust.
6. A practical compliance calendar identifying recurring statutory, tax, accounting and governance obligations and their respective deadlines.
7. Recommendations for the Trust's ongoing accounting, governance, reporting and compliance arrangements.
8. Any additional documentation or professional advice reasonably required to complete the regularisation and closure-related activities identified through the initial review.

Required Experience and Qualifications

The service provider should demonstrate:

- Relevant professional experience in accounting, tax, compliance and/or trust administration in South Africa.
- Demonstrated experience assisting trusts or comparable non-profit/community structures with statutory and tax compliance.
- Knowledge of applicable South African tax, accounting, governance and regulatory requirements.
- Ability to identify compliance gaps, regularise outstanding obligations and establish practical ongoing compliance systems.
- Capacity to work directly with Trustees and provide clear, practical advice to non-specialist stakeholders.
- Relevant professional registration or accreditation, where applicable.

Preference may be given to providers with demonstrated experience working with community-based organisations, trusts, non-profit organisations or similar structures.

Proposal Requirements

Interested service providers should submit a detailed proposal clearly setting out the proposed approach, scope and cost of each component of the assignment.

The proposal should include, at a minimum:

- Company/practice profile and relevant experience.
- Details of the proposed team and qualifications.
- Relevant experience with trusts, non-profit organisations and statutory/tax compliance.
- Description of the proposed methodology and workplan.
- Detailed breakdown of professional fees and any anticipated additional costs.
- Estimated timeframe for completion of the initial review and regularisation activities.
- Payment terms.
- At least two relevant references, where available.
- Any other information considered relevant to demonstrating the provider's capacity to deliver the assignment.

Providers are encouraged to clearly distinguish between one-off costs associated with the initial review and regularisation of the Trust and any proposed recurring or ongoing service fees.

Selection and Engagement

The procurement and selection process will be conducted in accordance with the applicable Oxfam South Africa procurement requirements.

The Trustees will be appropriately involved in the selection of the service provider on behalf of the Trust.

The selection will take into consideration:

- the technical quality and relevance of the proposal;

- the provider's experience and capacity;
- the proposed methodology;
- the proposed timeframe;
- the quality and completeness of the proposed deliverables; and
- overall value for money.

The lowest financial proposal will not automatically result in selection.

The selected service provider will enter into an appropriate consultancy or service agreement.

Contractual and payment arrangements will be managed by Oxfam South Africa in accordance with applicable requirements.

Proposed Timing

The assignment is expected to commence as soon as possible following completion of the procurement and contracting process. Given that the services form part of the AFD grant closure activities, providers should indicate their earliest availability and proposed timeframe for completing the initial assessment and any urgent regularisation activities.

The proposed timetable should clearly distinguish between:

- the initial review and identification of outstanding obligations;
- priority regularisation activities;
- completion of statutory, tax and other outstanding submissions; and
- any proposed ongoing support.

Submission of Proposals

Complete proposals should be submitted by the deadline indicated below to procurement@oxfam.org.za:

Submission deadline: September 5th 2026