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**REQUEST FOR PROPOSALS**

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**FLEURHOF HOUSING PROJECT**

**LESSONS LEARNT EVALUATION**

**RFP/JHB/2018/010**

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**PROPOSALS TO BE SUBMITTED BY**

**NOT LATER THAN**

**12H00 ON 15 JUNE 2018**

## 1. Introduction

1.1. The Housing Development Agency (HDA) is a national public development agency which promotes sustainable communities by making well located and appropriately planned land available for the development of human settlement. As its primary activity, the HDA acquires state, private and communal land and releases it for development. In addition HDA provides project delivery support services to organs of state at local, provincial and national level. Informal settlements upgrading and project management services are a particular focus of the organisation.

1.2. The Monitoring & Evaluation, Knowledge Management and Research unit is tasked with monitoring and tracking progress of the development of land and landed property acquired and released for the purposes of creating integrated and sustainable human settlements

1.3. The Housing Development Agency Chief Executive Officer has tasked the M&E unit with undertaking a lessons learnt evaluation of the Fleurhof Housing Project. The project was initiated in 2009 (EMPEA, 2012). The project was “a joint venture between International Housing Solutions (IHS), a private equity manager focused on affordable housing projects, and Calgro M3, a listed development company specializing in mixed-income residential construction” (ibid 1). IHS assisted with the equity financing and performed the financial structuring and Calgro M3 oversaw and managed the project (ibid). The City of Johannesburg was not part of the project initially but “retrospectively partnered with CalgroM3 to have the project developed” (HDA, 2017).

1.4. The lessons learned evaluation seeks to respond to the question on:

- What lessons would a team impart to a project team embarking on the delivery of a Project on a large scale under the auspices of the Human Settlements Programmes?
- What lessons have been learnt from the team who has invested in the delivery of the project, understanding the mechanics of the project and understanding the internal dynamics of the team?
- What lessons can be learnt against the project plan and the original ethos of

the delivery of a large scale?

- What reflections can be made on the undertaking of such projects in the future, from the planning through to design and implementation for those responsible for delivering at the forefront of the project management?
- What lessons have been learnt by the team which define the processes of how to maintain sustainable environments within the Project Implementation phase?

## 2. BACKGROUND

“Fleurhof Ext 2 is an integrated residential development consisting of 10 411 housing units. Located 14 km south-west of the Johannesburg CBD, the 440ha land area comprises of several types of residential units and tenure types that have specific economic target markets such as affordable housing, open market rental, social housing, GAP and RDP/BNG housing.

The Fleurhof development is one of the largest integrated housing developments in Gauteng and is included in the Gauteng Premier’s list of mega projects. Various green initiatives of energy saving technologies have been implemented as part of the development. This has the added benefits of reducing electricity demand and making Fleurhof socially and visually more attractive.” (HDA, 2018: 25-26)

“Amenities distributed throughout Fleurhof include business and retail space, creches, religious sites, a community centre, primary and secondary schools and parks. Other urban infrastructure includes upgrades to bulk and link infrastructure, Fleurhof Drive and the Fleurhof Drive bridge, the water reservoir and bulk water pipeline, and the construction of a substation.

There is substantial variation in terms of design, layout and typology of units in this integrated housing development. In addition, there are variations in price points of units, which makes them more accessible to different income groups.” (HDA, 2018: 26)

### 3. Scope of work

3.1. The terms of reference call for the appointment of a professional consultant to undertake the following:

3.1.1. Investigate the history and the context of the project within the housing delivery landscape of the government agenda

3.1.2. Study the experiences of the stakeholders from the following perspectives

- Land and legal position of the project
- Contracts and contract management
- Project timing and causes of delays (if any)
- Funding and project costing
- Expectation management
- Community engagements
- Engagement with various governmental entities
- Regulatory Framework
- Planning
- Urban Design
- Provision and presence of bulk/link infrastructure e.g. Water, roads, sewerage
- Relocations
- Beneficiary Management
- Non-qualifiers
- Conflict resolution
- Improvement of the quality of life of project beneficiaries since occupation

3.1.3. Appraisal of how the project has transformed the local landscape using the Spatial Transformation Scoring Tool

3.1.4. Assess the social, economic and ecological benefits of the community through the project including:

- Resolution of land claims (if any)
- Property ownership and the distribution of title deeds
- Provision of ancillary uses

- Proximity to economic and social opportunities
- Use of innovative technologies
- Access to digital connectivity
- Localised developments

3.1.5. Identify possible urban management challenges in the future regarding:

- Building maintenance
- Increase in rights and services needed in the area should formal/informal densification occur
- Understanding existing community organizations, political affiliations etc.

3.1.6. Identify to what extent has this project alleviated the housing backlogs

#### **4. Methodology**

- 4.1. The project must reflect the experiences of the project team in delivering the Fleurhof housing project
- 4.2. The project must reflect the impact of the development on the targeted community.
- 4.3. The project shall be managed by a single entity so that the final product is completely coherent. It should be based on the application of a single approach and set of standards.
- 4.4. The proposal should include proposed phasing options based on consultant's/firm's capacity, experience and expertise as well as an outline of stakeholders to be engaged in responding to the task.
- 4.5. The proposal should provide a clear project scale with specific tasks, responsibilities and proposed timeframes, including dates of submission for deliverables. Any contingencies which might affect timing should also be included.
- 4.6. The proposal must clearly outline the methodology that would be used and demonstrate a range of projects of the same nature that have been conducted. In this case references with contact details should be provided.
- 4.7. The consultant must also include the ways in which the HDA and relevant stakeholders will be engaged and a proposed method for regular engagement until the finalisation of the project.

## 5. Project Management

5.1. The project will be managed by the HDA under the leadership of the Senior Manager: Monitoring & Evaluation and Knowledge Management & Research.

## 6. Deliverables/outputs

6.1. The following deliverables are expected:

- A Final Report documenting the findings
- As part of the process of developing the report, the following milestones are expected as part of the deliverables:
  - a) Inception Report
  - b) Project Plan
  - c) Research protocols and data collection instruments
  - d) Draft report
  - e) Presentation
  - f) Final Report and infographics

6.2. All data and information collected as well as contact persons for information is to be compiled in a register in electronic and hard copy for the HDA.

6.3. Reports to be provided in Word document format with inter alia executive summary, table of contents, acronyms, list of tables and diagrams, etc.

Note that the language of the reports must be in such a manner that is accessible to provincial and municipal officials and other stakeholders working in the area.

6.4. Photos and other graphics are to be supplied separately in high resolution jpeg format.

## 7. Project Duration

The project schedule cannot go beyond 30<sup>th</sup> November 2018.

## **8. Evaluation criteria**

- 8.1. In order to facilitate a transparent selection process that allows equal opportunity to all production companies, the HDA has a policy for the appointment of consultants that will be adhered to. Proposals will be evaluated in terms of the prevailing supply chain policy applicable to the HDA. It should be noted that proposals will be assessed using the 80:20 formula for Price and B-BBEE as per the PPPFA.
- 8.2. The HDA needs to be satisfied, in all respects, that the organisation/individual selected has the necessary resources, qualifications and abilities for this project, and that all submissions are regarded in a fair manner in terms of evaluation criteria and process.
- 8.3. The general methodology of selection will be based on proposals that will first be evaluated on their technical ability to perform the task. Any proposals scoring below 75% of the points noted in the table below will be disqualified for the second evaluation.
- 8.4. The second evaluation of technically competent proposals will be evaluated against Price and B-BBEE using a 80/20 Price/B-BBEE formula.
- 8.4.1. Proposals will be evaluated using the 80/20 point system, where 80 points are for functionality and price and 20 points for empowerment of historically disadvantaged individuals.
- 8.4.2. The following are the key criteria that will be taken into account by the HDA:



CRITERIA	SUB-CRITERIA	WEIGHTING/ POINTS
Experience, knowledge and skill (provide CV of project team)	<ul style="list-style-type: none"> <li>○ At least five years of progressively responsible professional work experience in developing policy/ framework /strategy within the housing sector whilst understanding the life cycle of human settlements projects <b>[15 points]</b></li> <li>○ Demonstrated experience in the undertaking of lessons learnt and/or evaluations <b>[15 points]</b></li> </ul>	30
Understanding of the work	<ul style="list-style-type: none"> <li>○ Extensive understanding of human settlements programmes and sector at large <b>[20 points]</b></li> </ul>	20
Capacity (human resource) and	<ul style="list-style-type: none"> <li>○ Demonstrated capacity of the firm/consultant <b>[10 points]</b> <ul style="list-style-type: none"> <li>- Good coordination and team working skills <b>[5 points]</b></li> <li>- Demonstrated ability to meet the project capability deadline <b>[5 points]</b></li> </ul> </li> </ul>	20
Approach and methodology	<ul style="list-style-type: none"> <li>○ A detailed project plan specifying the approach, methodology and the indicators of success for each deliverable <b>[30 points]</b></li> </ul>	30
<b>TOTAL</b>		<b>100</b>

The following criteria will be used for point's allocation for price and B -BBEE compliance on an 80/20 point system:

CRITERIA	SUB-CRITERIA	WEIGHTING/ POINTS
Price	Detailed budget breakdown	80
B-BBEE Status Level Verification Certificate from accredited verification agencies	B-BBEE Level Contributor	20
<b>TOTAL</b>		<b>100</b>

## 9. Briefing Session

There will be no briefing session.

## 10. Terms and Conditions

- 10.1. The HDA undertakes to pay in three equal payments within thirty (30) days, all valid claims for work done to its satisfaction upon presentation of a substantiated claim/invoice.
- 10.2. No payment will be made where there is an outstanding information/work by the service provider/s.

## 11. Submission of proposals

- 11.1. Proposals should be submitted in a sealed envelope clearly marked **Fleurhof housing project lessons learnt evaluation** and deposited in a tender box on or before the **15 June 2018**, not later than **12H00** to the following address:

**Attention: Procurement**

Block A, Riviera Office Park  
6-10 Riviera Road  
Killarney, Johannesburg

Further information regarding technical matters may be sent via email to: [Karishma.Busgeeth@thehda.co.za](mailto:Karishma.Busgeeth@thehda.co.za) or telephone 011 544 1000.

Further information regarding supply chain matters and queries may be sent via email to: [Thabiso.Diutlwileng@thehda.co.za](mailto:Thabiso.Diutlwileng@thehda.co.za) or telephone 011 544 1000.

11.2. Proposals must be accompanied by:

- A company profile
- CSD registration report (registration with the **National Treasury Central Supplier Database**. If not yet registered, please use the following link to register: <https://secure.csd.gov.za>.)
- Curriculum vitae of proposed members of the team, illustrating qualifications and experience (maximum four pages)
- SBD Forms (SBD4, SBD6.1, SBD8 and SBD9) obtainable from HDA Website: [www.thehda.co.za/procurement](http://www.thehda.co.za/procurement). Under compliance checklist.
- Valid and Original or Certified B-BBEE Status Level Verification
- Certificates issued by the following agencies SANAS, IRBA or CCA

11.3. Failure to submit all required documents will lead to disqualification of the tender.

11.4. The selection of the qualifying proposal will be at the HDA's sole discretion. The HDA does not bind itself to accept any particular bid/proposal, and the HDA reserves the right not to appoint the consultant.

#### References

EMPEA [Emerging Markets Private Equity Association]. (2012). Case Study: Fleurhof Project (South Africa). The Impact of Private Equity in Emerging Markets. August 2012.

HDA. (2017). Assessment of the Integrated Residential Development Programme (IRDP) and its impact on spatial transformation. Housing Development Agency: Johannesburg

HDA. (2018). Sectional Title Schemes Application in Affordable/Fully Subsidised Housing Sector. Housing Development Agency: Johannesburg