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**REQUEST FOR PROPOSALS**

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**DEVELOP SECTOR WIDE BENCHMARKS FOR MAINTENANCE  
WITHIN THE AFFORDABLE AND FULLY SUBSIDIZED HOUSING  
SECTOR**

**RFP/JHB/2017/009**

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## 1. Introduction

1.1. The Housing Development Agency (HDA) is positioning itself into an effective public sector human settlements development agency. It acts as the project developer of sustainable, integrated human settlements on behalf of government to drive delivery, undertaking the following functions:

- Accessing land for human settlements projects
- Packaging of human settlements projects
- Establishing delivery partnerships with the private sector
- Mobilising, coordinating and investing funds on behalf of the public sector
- Facilitating the resolution of blockages
- Monitoring the implementation of human settlements projects

1.2. An assessment of maintenance at building and precinct level within the affordable and fully subsidized housing sector indicated that there are no sector wide maintenance benchmarks and parameters. Further the study noted that across the sector there is limited or no accurate data available.

1.3. As the HDA embarks on developing its own Human Settlements Projects, there is a need to access credible maintenance data for the affordable housing sector and to develop a set of benchmarks and maintenance parameters for the sector.

## 2. Scope of work

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

2.1.1. Develop credible datasets for maintenance within the affordable housing sector

2.1.2. Provide a sector specific set of benchmarks that can be applied to building and precinct maintenance within the affordable housing sector

2.1.3. Establish the methodology for maintenance parameters within the affordable housing sector

2.1.4. Provide a framework for the maintenance benchmarks for maintenance within the affordable housing sector

2.1.5. Develop a set of sector specific indicators for maintenance within the affordable housing sector

### **3. Methodology**

- 3.1. The project must speak to the vision of providing sustainable settlements and the mission of the HDA.
- 3.2. 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.
- 3.3. 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.
- 3.4. 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.
- 3.5. 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.
- 3.6. The consultant must also include the ways in which the HDA and NDHS will be engaged and a proposed method for regular engagement until the finalisation of the project.

#### **4. Project Management**

4.1. The project will be managed by the HDA under the leadership of the Senior Manager: Policy, Research and Monitoring & Evaluation.

#### **5. Deliverables/outputs**

5.1. 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) Findings of the different assessments
  - c) Draft report
  - d) Final Report with infographics

5.2. 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.

5.3. 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.

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

#### **6. Project Duration**

The project schedule cannot go beyond 30 September 2017.

## **7. Evaluation criteria**

- 7.1. 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.
- 7.2. 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.
- 7.3. 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.
- 7.4. The second evaluation of technically competent proposals will be evaluated against Price and B-BBEE using 80/20 Price/B-BBEE formula.
- 7.4.1. 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.
- 7.4.2. 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 benchmarks and indicators within the housing sector - provide client testimonies <b>[15 points]</b></li> <li>○ Demonstrated experience in building maintenance programmes – provide evidence <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 – provide evidence <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>

## 8. Briefing Session

There will be no briefing session.

## 9. Terms and Conditions

- 9.1. 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.
- 9.2. No payment will be made where there is an outstanding information/work by the service provider/s.

## 10. Submission of proposals

- 10.1. The closing date for submission of proposals is on or before the **15 June 2017** by no later than 12h00 to the following address:

Attention: Procurement Officer  
Block A, Riviera Office Park  
6-10 Riviera Road  
Killarney, Johannesburg

Further information regarding technical matters can be sent an email to: [karishma.busgeeth@thehda.co.za](mailto:karishma.busgeeth@thehda.co.za) or at tel: 011 544 1000

- 10.2. Proposals must be accompanied by:

- A company profile
- Curriculum vitae of proposed members of the team, illustrating qualifications and experience (maximum four pages)
- A valid tax clearance certificate or SARS Pin
- 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
- Company Summary Report Obtainable from Central Supplier Database (CSD)

- 10.3. Failure to submit all required documents will lead to disqualification of the tender.
- 10.4. 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.