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6-10 Riviera Road,
Riviera



REQUEST FOR PROPOSALS

**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP
ENGAGEMENT PROTOCOLS' FRAMEWORK**

PROPOSALS TO BE SUBMITTED BY

NOT LATER THAN

12 NOON ON 03 SEPTEMBER 2018

1. INTRODUCTION

- 1.1 Housing Development Agency (HDA) is a public development entity accountable to the National Department of Human Settlements. The Agency is established in terms of the HDA Act, 23 of 2008 to acquire and release state, private and communally owned land for human settlement developments and provide programme management and related services.
- 1.2 Section 7(1) (f) of the Act also provides that, “.....*the Agency has to ensure that there is collaboration and intergovernmental and integrated alignment for housing development services.....*” As a result the Agency supports all 9 provinces around South Africa and its municipalities; and undertakes discussions with other stakeholders in order to ensure that its enhanced role and services are understood.
- 1.3 In this regard, the HDA developed a Stakeholder and Intergovernmental Relations Strategy and Implementation Plan to direct and support this function within the Agency. It is from the process of consultation that the need to develop an Engagement Protocols Framework was established and agreed to.
- 1.4 It is therefore against this background that the HDA hereby invites professional service providers to submit proposals for the development of Engagement Protocols Framework as outlined in these terms of reference document.

2. OBJECTIVES OF THE PROJECT

- 2.1 The Engagement Protocol framework, following the identification and a stakeholder analysis will inform the selection of engagement approaches and tools which will enhance the effectiveness of engagement.
- 2.2 The main objective is therefore to develop a framework that will recommend a model that details how engagements with stakeholders at different levels will be institutionalised across the organisation.

3. SCOPE OF WORK

The Framework must address the following considerations:

- 3.1 An approach to engaging the Agency’s stakeholders that is in line with the organisational’s strategic goals and objectives in promoting participation, ownership and active involvement of stakeholders including beneficiary communities throughout the life cycle of the human settlements projects.
- 3.2 Consider protocols’ standard to the public sector domain.
- 3.3 The Framework must include principles to guide the Agency’s engagement approach.
- 3.4 It must consider a matrix to support tailoring the level of engagement to the task as well as
- 3.5 Address the challenges to consider and strategies for success.

4. DELIVERABLES & OUTPUTS

Based on the above scope of work the prospective service provider must provide the following outputs:

- 4.1 An Inception Report covering an overall project plan (inclusive of a project schedule) final outputs, proposed methodology and identified timeframes/milestones.
- 4.2 Consolidation of a draft Engagement Protocols Framework for consultation.
- 4.3 A final Engagement Protocols Framework that contain all inputs made as would have been agreed to including all the elements mentioned above in 3.4
- 4.4 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.
- 4.5 Ownership and publication of deliverables – the HDA will become the owner of all data collected, furnished and/or compiled by the service provider during the course of and for the purposes of executing the agreement. To the extent that copyright in any intellectual property compiled by the service provider during the course of and for purposes of the agreement vests with the service provider, such copyright will become the property of the HDA unless otherwise agreed by the HDA.
- 4.6 Confidentiality - information gathered by the service provider shall remain confidential.

5. METHODOLOGY

The service provider must supply a detailed methodology with this proposal. This must include:

- 5.1 A statement on how the service provider understands the requirements of this assignment
- 5.2 There should a clear project scale and desired time lines
- 5.3 The proposal clearly outline the methodology that would be used
- 5.4 The project plan must clearly outline and define the stakeholders to be engaged in responding to the task.
- 5.5 A clear statement of available expertise and capacity to match the requirements of this assignment as highlighted in the scope of work.
- 5.6 An indication of any innovative approaches and 'value-add' that the service provider may think appropriate.

6. REQUIRED SKILLS and TEAM COMPOSITION

The submission of the proposal must demonstrate the following characteristics as an indication of the capacity in accordance with the scope of work outlined above:

- 6.1 At least 3 years' experience in developing stakeholder related policies and/or strategies preferably in public sector.

6.2 Understanding of government housing and human settlements delivery context, policies, legislation and requirements

6.3 Proficiency in the use of standard word processing and other MS Office programs.

7. TIMEFRAMES/ DURATION OF CONTRACT

7.1 The final report and any related supporting annexures should be submitted to the HDA within a period of 2 months from the project commencement date (to be stipulated in the appointment letter).

7.2 An inception report for the project should be developed within one week of appointment.

7.3 The first draft report and deliverables should be prepared in consultation with the Agency officials to be presented within 4 weeks after the appointment.

7.4 The bi-weekly or ad hoc discussions to be held with Agency's officials for draft and final recommendations.

8. EVALUATION PROCESS

8.1 The HDA needs to be satisfied, in all respects, that the organisation 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.

8.2 The general methodology of selection will be that proposals will first be evaluated on their technical ability to perform the task. Any proposals scoring below **70%** of the points noted in the table below will be disqualified for the second evaluation. The second evaluation of technically competent proposals will be evaluated against Price and B-BBEE using 80/20 Price/B-BBEE formula.

8.2.1 TECHNICAL (FUNCTIONALITY) CRITERIA

Stage 1 Evaluation: Scorecard – Table 1

CRITERIA	SUB-CRITERIA	WEIGHTING/ POINTS
Company profile and individual team members CV's	Company profile(s) to be submitted (in case of a joint Venture, all companies must submit separate profiles) indicating the Lead Company [10 Points]	10
Related Experience	Expertise and related experience in executing similar projects. Experience in executing similar work for the public sector will be advantageous.	30
Personnel/Capacity	Number and instruments/tools must be sufficient to cover the work nationally.	20
Approach and methodology	<ul style="list-style-type: none">Methodology, project plan (process plan, expected outputs, deliverables and milestones/timeframes.	40
Total		100

It is important to note that only Bids scoring a minimum threshold score of 70 points in terms of the above evaluation criteria will be considered for stage 2 evaluation below.

8.2.2 B-BBEE AND B-BBEE

Stage 2 Evaluation: Price and B-BBEE – Table 2

The following criteria will be used for point's allocation for price and B-BB-EE compliance on a **80/20** point system:-

Table 2 – Price and B-BBEE

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
TOTAL		100

9. REQUIREMENTS

Below are compulsory requirements for this service.

- 9.1 It is important to note that the successful applicant will work under the supervision of a HDA representative, abide by HDA's Code of Conduct, and other organizational guidelines.
- 9.2 Kindly submit the following documents:
- Registration with the National Treasury Central Supplier Database(CSD Report), if not yet registered use the following link to register : <https://secure.csd.gov.za/>
 - SBD Forms (SBD4, SBD6.1, SBD8 and SBD9) obtainable from HDA Website: www.thehda.co.za/procurement. Under compliance checklist.
 - Total price proposals on all work to be done.
 - Valid and Original or Certified B-BBEE Status Level Verification Certificates issued by the following agencies SANAS, IRBA or CCA.
- 9.3 Further information regarding technical matters and queries can be sent via email to: tulani.mateza@thehda.co.za or Tel: 011 544-1000.
- 9.4 Further information regarding supply chain matters and queries can be sent via email to: sindisiwe.mweli@thehda.co.za or Tel: 011 544-1000.
- 9.5 Proposals should be submitted on or before the **03 September 2018** no later than **12h00** to the following address:

**The Procurement Specialist,
The Housing Development Agency,
Block A, 6-10 Riviera Road,
Killarney, Johannesburg, 2193**

10 GENERAL

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

10.3 The HDA expresses that in an event of any service provider being appointed on this job, there is no expectation that any follow up work on this project will be granted to him/her.