

**P.O. Box 3209,**  
Houghton, 2041  
Block A,  
Riviera Office Park,  
6-10 Riviera Road,  
Riviera



**REQUEST FOR PROPOSALS**

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**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE  
DEVELOPMENT OF A SOCIAL FACILITATION FRAMEWORK  
RFP/JHB/2017/025**

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**PROPOSALS TO BE SUBMITTED BY  
NOT LATER THAN  
12H00 ON 24 NOVEMBER 2017**

## **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 Since its inception, HDA's focus at inception has been on the management of the two Section 29 projects namely N2 Gateway and Zanemvula projects. Over time, project management support functions to provinces and municipalities became a key activity and was used as the basis for land identification, acquisition, release and development.
- 1.3 The Minister of Human Settlements has since required the HDA to play a more enhanced role as a developer of choice for the human settlements sector. This has effectively broadened the requisite partnerships arrangements necessary for the HDA to support its mandate and thus heightened the critical role to be fulfilled by stakeholder management and intergovernmental relations as well as the interface that that HDA is supposed have with the communities who are beneficiaries of the service.
- 1.4 The HDA has over the years developed its project implementation support capacity in supporting government in the implementation of human settlement programmes. A recent analysis of the delivery space has indicated the need for the HDA to play the role of a development manager, particularly to address housing supply where the public sector is failing to perform or the private sector is reluctant to invest.
- 1.5 Taking advantage of practical implementation of projects such as the N2 Gateway and Zanemvula projects in particular, and their associated social facilitation experiences, the HDA wants to standardise social facilitation and have it institutionalised and standardised across the organisation.
- 1.6 In taking this forward, the HDA must design a framework with a model for social facilitation that would assist the organisation to take forward its role as a public sector developer and dealing with the interface with the communities at the project level in the light of the Agency's goals and objectives.
- 1.7 It is therefore against this background that the HDA hereby invites professional service providers to submit proposals for the development of a Social Facilitation Framework as outlined in these terms of reference document.

## **2. OBJECTIVE OF THE PROJECT**

- 2.1 Social facilitation is a tool that is used to engage stakeholders in the human settlement development process to ensure that all stakeholders especially community members are kept informed throughout the development process. Seeing that the organisation has over the years outsourced this process, the HDA is now at the stage whereby it must develop a framework that proposes a model on how best to undertake this function within HDA.

- 2.2 The main objective is therefore to develop a framework that will recommend a model that details how social facilitation will be institutionalised across the organisation, including the required resources and capacity necessary to be allocated towards the function.

### **3. SCOPE OF WORK**

The Framework must address the following considerations:

- 3.1 High level literature review on the subject matter to provide the basis for the proposed approach and model
- 3.2 Propose an approach to social facilitation that is in line with the Agency'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.
- 3.3 Conduct research and consolidate lesson learnt from relevant stakeholders undertaking social facilitation, the current HDA staff involved in community development in the N2 Gateway and Zanemvula, project managers as well as other role players relevant to the human settlement sector and the development of this framework.
- 3.4 Develop a model that would detail the following:
- Unpacking HDA current business case and recommend the institutional arrangements necessary for coordination, alignment and accountability at programme and project level
  - Local governance arrangements at project and community level that will support the mobilisation of communities in order to identify what they have and what they know that can be put to better use, and to make linkages and partnerships to expand the knowledge, skills and resources available to them.
  - Appropriate community consultation and engagement processes, the model must detail the methodology that is best suited to engaging communities and beneficiaries of the human settlement projects taking into account their specific context
  - Communication protocols and methods
  - Technical capabilities including staffing requirements, skill and competencies level and training and support programme
  - Investigate the social, developmental and financial implications for the implementation of such a model.

### **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) with intermediate and final outputs, proposed methodology and identified timeframes/milestones.
- 4.2 Consolidation of a draft the HDA Social Facilitation Framework with the high level implementation plan

- 4.3 A final HDA Social Facilitation Framework that contain all the aforementioned issues together with implementable recommendations. The recommendations must be in the form a proposed model 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 10 years' experience in social facilitation and / or community liaison skills with emphasis on community engagements and consultations.
- 6.2 Need to demonstrate an understanding about indicators of successfully mobilized communities.

- 6.3 Understanding of government housing and human settlements delivery context, policies, legislation and requirements
- 6.4 Experience in drafting government policy, framework or strategy documents
- 6.5 Proficiency in the use of standard word processing, web browsers, spreadsheets and presentation software, database systems.

**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 8 weeks from the project commencement date (to be stipulated in the appointment letter).
- 7.2 An inception report for the project should be developed within two weeks of appointment.
- 7.3 The first draft reports and deliverables should be prepared in consultation with the Agency officials to be presented when required.

**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
<b>Lead Company profile (Attach Organogram)</b>	Company profile (s) to be submitted (in case of a joint Venture, all companies must submit separate profiles) indicating the Lead Company	<b>10</b>
<b>CVs of team members proposed to do the work</b>	Demonstrable Skills and Capacity, Level of Relevant Knowledge and Experience. Adequacy and completeness of skills of team presented and fit for task.	<b>40</b>

	Related work of the lead company	<b>10</b>
<b>Approach, Methodology , Work Plan and Process</b>	Proposed methodology	<b>20</b>
	Meeting deliverables and timeframes	<b>10</b>
	Work programme, Plan and allocation of resources and tasks.	<b>10</b>
<b>TOTAL</b>		<b>100</b>

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 evaluations below.

### 8.2.2 B-BBEE and COST EVALUATION CRITERIA

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

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

**Table 3 – Price and B-BBEE**

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

## 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:
- Valid original tax clearance certificate.
  - 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.
  - 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 supply chain matter and queries can be send via email to: [jerry.makofane@thehda.co.za](mailto:jerry.makofane@thehda.co.za) or by telephone (011) 544-1000

9.4 Further information regarding technical matters and queries can be sent via email to: [sibongile.mpofu@thehda.co.za](mailto:sibongile.mpofu@thehda.co.za) or by telephone (011) 544-1000

9.5 Proposals should be submitted on or before the 24<sup>th</sup> November 2017 by 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.