

**Bid No: SCM 46/2024/25**

**Supply Chain enquiries: 016 973 8740/44**

**Date:** 13<sup>th</sup> of February 2025

**Request for formal Written Quotation**

Kindly furnish Metsimaholo Local Municipality with a written quotation for the services as detailed on the below schedule.

**REQUEST FOR PROPOSAL: APPOINTMENT OF A SERVICE PROVIDER FOR FACILITATION OF STRATEGIC PLANNING SESSION.**

Detailed Specification, returnable forms MBD and General Conditions of Contract (GCC) are obtainable from Supply Chain Management Unit, Finance Building, Sasolburg 1947 at **R50.00**

The quotation must be placed on the letterhead of your company and must be delivered not later than the **21<sup>st</sup> of FEBRUARY 2025 before 11H00AM** in the tender box located at Metsimaholo Local Municipality, First Floor, Finance Building, 10 Fichardt Street, Sasolburg. The following requirements will apply:

- **Be registered on the Central Supplier Database (CSD)** and provide us with your Supplier number or attach a **Summary report**.
- **Facilitator's qualification** - NQF 6, 7 & 8 in Accounting & Auditing, Business Management/Admin, Municipal Admin/ Public Admin, Economics or any other relevant areas.
- **Facilitator's competencies and experience** - detailed CV supported by a sworn affidavit of the Facilitator indicating the experience obtained in facilitating strategy.
- **Companies track record** - minimum of 3 contactable reference letters from clients where similar projects were rendered.
- **Project plan and methodology** - provide a detailed project plan and methodology outlining how the scope of work will be delivered.
- **The service provider** must submit **municipal rates and taxes statement on the company name** that is not older than three months and not in arrears for more than 90 days or **Lease agreement** where the company is the lessee.

**Please take note that the quotation must be valid for 60 days.**

**NB! IT IS COMPULSORY TO PURCHASE THE BID DOCUMENT FROM THE MUNICIPALITY FAILURE TO DO SO WILL RENDER YOUR SUBMISSION AS A NON-RESPONSIVE BID AND WILL NOT BE EVALUATED FURTHER.**

**This quotation will be evaluated in terms of 80/20** of points system as prescribed in the **Preference Points Claim Form in Terms Of The Preferential Procurement Regulations 2022 (Price(80) and Specific Goals (20) (Locality)** for this purpose the bidders are required to submit **Municipal account** in the name of the bidder not older than 90 days or a valid copy of lease agreement signed by both parties, where the bidder is the lessee, or SARS tax pin document or submit your company **bank confirmation letter** with address of the company, if **bank confirmation letter** does not reflect the bidders address the **bank confirmation letter** must be submitted with the **bank statement**.

General Conditions are available on the Municipal website for your information. Failure to comply with the above conditions may invalidate your offer.

Mr F.J. Motloung  
Municipal Manager

## **SPECIFICATIONS**

### **REQUEST FOR PROPOSAL: APPOINTMENT OF A SERVICE PROVIDER FOR FACILITATION OF STRATEGIC PLANNING SESSION.**

Metsimaholo Local Municipality hereby invites proposals from suitably qualified, skilled, experienced and competent service provider with a multi-disciplinary team to facilitate 2025 municipal strategic planning session.

#### **1. Background**

Metsimaholo Local Municipality seeks to procure the services of a suitably qualified, skilled, experienced and competent service provider to facilitate a three (3) day strategic planning session aimed at defining the future strategic direction of the municipality. This includes, amongst others, the strategic outcomes that will propel the municipality towards optimal delivery on the municipality's legislative mandate and responsibilities, enhancing operational excellence, and ensuring improved quality and sustainable services to communities.

The outcomes of the session must ensure that the strategic intent and direction, key operational plans and activities are responsive and aligned to the local government mandate, compliance requirements, government priorities and programmes, emerging technologies as well as financial resources of Metsimaholo Local Municipality.

Therefore, the service provider must have sound knowledge and understanding on matters pertaining to laws and regulations guiding the local government sphere, and must demonstrate good communication, data presentation and writing skills.

#### **2. Terms of Reference**

##### **2.1 Purpose of Terms of Reference**

The purpose of these terms of reference is to outline the objectives, scope, deliverables and other requirements for the project in order to provide clarity and direction and to ensure alignment of needs and expectations.

## 2.2 Project Deliverables

Strategic Planning is an organisation's process of defining its strategy or direction and making decisions on allocating its resources to attain strategic goals. Furthermore, it may also extend to control mechanisms for guiding the implementation of the strategy.

The process involves documenting and establishing the direction of a business or organisation by assessing where it is and where it is going. In a nutshell, it is an approach wherein the organisation is creating specific organisational strategies, implementing them and evaluating the results of executing the plan regarding its overall long-term goals and desired objectives.

With the foregoing objectives in mind, Metsimaholo Local Municipality is looking to procure the services of a suitably qualified, skilled, experienced and competent service provider to facilitate a three (3) day strategic planning session aimed at defining the future strategic direction of the municipality. In order to achieve the foregoing objectives, the appointed service provider will be responsible for delivering the following tangible and intangible deliverables as a minimum:

- (i) Project programme;
- (ii) Project agenda and methodology;
- (iii) Environmental Scan Report;
- (iv) Action Plan;
- (v) Project close-up report

The service provider must produce the final report of the discussions and decisions of the session within two (2) weeks post the strategic planning session as well as a set of strategic objectives that will guide the operations of the Metsimaholo Local Municipality for the next 3 years of the remaining 5-year term (2022/23 to 2026/27) and enable it to reposition itself and activate the acceleration of service delivery to the communities of Metsimaholo area.

## 2.3 Scope of work

The successful service provider will be expected to carry out the following activities as a minimum, in order to achieve the project deliverables as outlined above:

- a) Analyse strategic documents such as the five (5) year IDP for the period 2022/23 to 2026/27, 2022/23 annual report, municipal revenue enhancement strategy, etc. as part of preparation, before the strategic session. This also includes the review of the vision, mission, strategic objectives, and priorities.
- b) Consult with Senior Management, Members of the Mayoral Committee and Managers to understand the overall intention and expectations for the strategic planning session.
- c) Compile the workshop programme in consultation with the Accounting Officer and/or Manager: IDP/PMS.
- d) Compilation and packaging of the municipal strategic session material for distribution to attendees.
- e) Facilitate the strategic planning sessions, inclusive of scenario planning for long-term positioning of the municipality, as well as developing the strategic intent for long-term sustainability.
- f) Facilitate a consultative process and apply contemporary tools of analysis to refine focus areas such as priorities, strategic interventions, and key result areas.
- g) Facilitate the drafting of SMART goals and objectives with defined time frames and assist in the development of an action plan to achieve these. This includes the development of comprehensive performance indicators that will help the organisation to track, monitor and review progress against targets.
- h) Capture the workshop discussions, analyse and refine these for use as content for the strategic planning session report.
- i) Submit the first draft strategic planning session report within two (2) weeks, after the last (day 3) session.
- j) Submit the final strategic planning session report within four (4) weeks, post the three (3) day session or as agreed with the municipality.
- k) Submit the final report that outlines the new strategic objectives / intent of Metsimaholo Local Municipality.

## 2.4 Submission Requirements

Bidders are required to submit the following information for the purpose of evaluation:

- a) A formal written price quotation;
- b) A detailed proposal in line with the terms of reference and scope of work as enlisted in this document, with specific focus but not limited to the following elements:

- (i) A problem statement. The problem statement should as a minimum clearly demonstrating the bidder's understanding of Metsimaholo Local Municipality's business, its challenges and opportunities and how the bidder's proposes to leverage on the opportunities assist in resolving such challenges through strategic planning process;
- (ii) A proposed methodology and approach,
- (iii) A proposed implementation plan, and
- c) Company profile which must include past applicable experience;
- d) Copy of company documents;
- e) Copy of the bidder's CSD report;

## **2.5 Submission procedures / guidelines**

- a) No faxed or emailed quotations shall be accepted.
- b) Bids must be delivered at the stipulated address and at the correct date and time.
- c) Late bids will not be accepted and will not be evaluated.
- d) Bidders must be registered with the Central Supplier Database (CSD) in order to enable the municipality to verify information such as business registration particulars, directorship / membership, ID numbers, etc.

## **2.6 Restrictions**

- a) Bids from persons employed who are in the service of state or companies whose directors (members in the case of close corporation), trustees; shareholders are in the service of state shall not be considered.
- b) Bids from bidders whose names or bidders whose directors (members in the case of close corporation), trustees; shareholders are on the Register of Restricted Bidders / Suppliers held by the National Treasury shall not be considered.

## **2.7 Timing**

The strategic planning session shall be held over three (3) days during the month of March 2025. The proposed dates for the Municipal Strategic Session are from the **12 to 14 March 2025**.

## 2.7 Participants

The Municipal strategic planning session will be attended by the not more than one hundred (**100**) participants, which include amongst others Executive Mayor, Speaker, Members of the Mayoral Committee, Political Party Whips, Senior Managers, Divisional Heads and Assistant Managers, and other relevant invitees.

## 3. Evaluation Criteria

This bid will be evaluated through criteria as set out below:

3.1 Will focus on administrative acceptability and compliance of bidders in line with the requirements and conditions as enlisted under section 2 above. Bidders who do not comply with any of the requirements for this stage shall be automatically disqualified and will not be evaluated any further and those who complied with the requirements and conditions will progress to be evaluated on the next stage.

3.2 The final evaluation stage will involve evaluation of pricing and allocation of preference points.

## RETURNABLES

Criteria	
Highest Qualifications of the lead facilitator obtained in: <ul style="list-style-type: none"><li>Accounting and Auditing</li><li>Business Management / Administration</li><li>Municipal Administration / Public Administration</li><li>Economics</li><li>Law</li><li>Management</li></ul>	NQF 8 or higher NQF 7 NQF 6
Curriculum Vitae, supported by a sworn affidavit confirming a minimum 10 years' experience of the lead facilitator in the following field(s):  Strategic Planning in Local Government;  Local Government Finance,	

<b>Criteria</b>	
Performance Management in Local Government, Auditing in Local Government; Senior Management in Local Government.	
<b>Signed Reference letters</b>  Demonstrate expertise of the bidder by submitting three (3) signed references letters from different clients in local government indicating successful implementation of similar or related projects.	
<b>Project plan and methodology</b> - provide a detailed project plan and methodology outlining how the scope of work will be delivered.  Does the proposal clearly and sufficiently contextualise the municipality's needs and expectations, identifies possible methodology though a coherent and workable implementation plan and approach that is able to seamlessly ensure delivery of measurable output and results.	

### 3.1.3 Price and Preferential Points Evaluation

The final evaluation stage shall involve evaluation of pricing and allocation of preference points.  
The 80/20 preference point system shall be applicable.

### 4. Bid Validity Period

This bid will be valid for a period of 60 days.

NB: failure to comply with any of the above requirements and / or conditions will results in your bid being automatically disqualified.