

Bid No: SCM 58/2024/25

Supply Chain enquiries: 016 973 8740/44

Date: 7th of April 2025

Request for formal Written Quotation

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

APPOINTMENT OF A SERVICE PROVIDER FOR FACILITATION OF STRATEGIC MANAGEMENT LEKGOTLA FOR METSIMAHOLO Local MUNICIPALITY.

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 **15TH of APRIL 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**.
- **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. Motloun
Municipal Manager

SPECIFICATIONS

Metsimaholo Local Municipality hereby invites written priced quotations, accompanied by written proposals from suitably qualified and experienced service providers for conducting of **Strategic Management Lekgotla for Metsimaholo Local Municipality**.

1. Objectives

Metsimaholo Local Municipality seeks to procure the services of a suitably qualified, skilled, experienced and competent service provider to conduct a three (3) day Strategic Management Lekgotla (SML) workshop aimed at rationalisation of the 2025/26 strategic and operational plans and Medium Term Revenue and Expenditure Framework (MTREF) in order to ensure optimised and uninterrupted focus on the following:

- a) needs of the community;
- b) priorities to meet those needs;
- c) organisational & delivery mechanisms to meet those needs; and
- d) enhancing operational excellence and ensuring improved quality and sustainable services delivery.

The outcomes of this process must ensure that the strategic intent and direction, key tactical and operational plans and activities that are responsive and guaranteeing action oriented outcomes.

The service provider must therefore have lucid knowledge, understanding and experience in local government integrated development planning, financial management, performance management and service delivery and budget implementation techniques.

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.

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.
- b) Consult with authorities such as Senior Management, Budget Steering Committee and Line Managers to understand the overall intentions and expectations at various levels with an objective to analyze, refine and formulate a congruent strategic position for the municipality that will lead to attainment of the enlisted objectives as outlined in this document.
- c) Compile an implementation plan / program in consultation with the Accounting Officer and/or Senior Managers.
- d) Compilation appropriate planning material and documents for distribution prior to the Lekgotla workshop.
- e) Conduct the Lekgotla sessions, inclusive of scenario planning for short to long-term positioning of the municipality, as well as developing the strategic intent for long-term sustainability.
- f) Conduct 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 results oriented 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 performance targets that may be agreed upon.
- h) Capture the workshop deliberations, analyse and refine these for use as content for the final report and action plan.
- i) Submit the first draft report to management within one week, after the last session for comments and inputs.
- j) Submit the final report within one week after the final comments were received on draft report.

2.2 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) Copy of company documents;
- d) Copy / copies of directors of the company must be submitted.
- e) Tax compliance personal identification number (PIN) issued by SARS;
- f) Copy of the bidder's CSD report;

2.3 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.

2.4 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 workshop sessions shall be held over three (3) days during the month of April 2025. The proposed dates are from the 23 to 25 April 2025.

2.5 Participants

The Lekgotla sessions 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, Municipal Manager, Senior Managers, Line Managers, and other relevant invitees.

2.6 General Rules and Instructions

2.6.1 Instructions and mandatory for submitting bids

- a) All quotations must be accompanied by completed bid documents obtainable at **Metsimaholo** at a fee of R 50. Bid documents will be available for sale from 8 April 2025.
- b) Bid must be submitted on or before **11h00; 15 APRIL 2025**.
- c) The bids must be dropped in the tender box at **Finance Building, First Floor, Metsimaholo Local Municipality, Civic Centre, Fichardt Street, Sasolburg, 1947**
- d) Bids shall be submitted on the date of closure of the Bid. The soft copy of the bid must be on a memory stick, clearly marked with the correct bid description and number.
- e) The original copy must be signed in black ink by an authorised employee, agent or representative of the bidder and each and every page of the bid and proposal shall must be initialled by same signatories.
- f) Bidders must submit written proposal responses in accordance with the prescribed manner of submissions as specified in this document.
- g) Bid must be submitted in a prescribed response format herewith reflected as Response Format, and be sealed in an envelope. The envelope must be marked clearly (on the outside) with the Bid Number.
- h) Metsimaholo Local Municipality receives a lot of correspondence on a daily basis. Bidders are therefore urged to ensure that they clearly mark their bids with the correct bid description and number.
- i) Bids received after the stipulated time shall not be considered.

- j) The onus is on the Bidders who send their bids by courier services to ensure that bids are submitted before the closing time.
- k) All additions to the bid document i.e. annexures, supporting documentation pamphlets, photographs, technical specifications and other support documentation covering the solution offered etc. must be neatly bound as part of the bid.
- l) All responses regarding questions posed in the annexures attached herewith shall be answered in accordance with the prescribed RFP Response Format.
- m) Bidders should ensure that quotations are delivered timeously to the correct address. If the submission is late, it will not be accepted for consideration.
- n) This bid is subject to the preferential procurement policy framework act and the preferential procurement regulations, 2017, the general conditions of contract (GCC) and, if applicable, any other special conditions of contract.
- o) Bid documents must contain one original document, initialled on each page, and signed where required.
- p) Bid forms must not be retyped or redrafted but photocopies may be prepared and used where appropriate. However, only documents with the original signature in black ink shall be accepted. Additional offers against any item should be made on a photocopy of the page in question.
- q) Black ink should be used when completing bid documents.
- r) No bids shall be accepted by Metsimaholo Local Municipality if submitted in any manner other than as prescribed above.

3. Evaluation Criteria

This bid will be evaluated through a three (3) stage criteria as set out below:

Stage 1 will focus on administrative acceptability and compliance of bidders in line with the requirements and conditions as enlisted under section 2 above. No points shall be allocated for stage 1 evaluations; however, bidders who do not comply with any of the requirements for stage 1 evaluation 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 stage 2.

Stage 2 shall involve evaluation of functionality, wherein the proposals of bidders shall be evaluated in line with the functionality criteria outlined on the functionality table below. Only

bidders who score a minimum of score a minimum of 80 points in stage 2 shall progress to be evaluated on stage 3.

Stage 2 evaluation for functionality shall be evaluated according to the criteria outlined on the table below:

Stage 2 Evaluation – Functionality Evaluation

Criteria	Score	Maximum Points
Relevance and Quality of the Proposal		60
The proposal must clearly and sufficiently contextualise the municipality's needs and expectations in line with the term of reference.	20	20
The proposal must identify possible methodology though a coherent and workable implementation plan and approach that is able to seamlessly ensure delivery of measurable output and results.	20	20
The bidder must identify, in the proposal areas of weakness and strength within the municipality's integrated development planning value chain and prioritize the issues which will be addressed during the entire Strategic Management Lekgotla workshop process.	20	20
Experience of the project leader		
Curriculum Vitae, supported by at least NQF level 7 academic qualifications, plus a sworn affidavit confirming a minimum 10 years' experience of the project leader in the following field(s): Strategic Planning in Local Government; Local Government Finance, Performance Management in Local Government, Auditing in Local Government, Senior Management in Local Government.	10 years' experience + NQF 7 or higher = 10 points 9 years' experience + NQF 7 or higher = 9 points 8 years' experience + NQF 7 or higher = 8 points 7 years' experience + NQF 7 or higher = 7 points 6 years' experience + NQF 7 or higher = 6 points 5 years' experience + NQF 7 or higher = 5 points	10

Criteria	Score	Maximum Points
	Less than 5 years' experience + NQF 7 or higher = 0 points	
Specific Expertise of the Bidder & Currency of the Bidder		
Copies of official order or appointment letter together with on the client's original letterheads signed by the authorised client's employee / officer, with valid contact details of the contact person together with one (1) copy proof of payment (PoP) for the same project, on the client's original letterheads signed by the authorised client's employee / officer, with valid contact details of the contact person evidencing the bidder's involvement in strategic management / support projects in local government currently or at least in the past twelve months counting back from April 2025.		30
	<p>Valid appointment letter / official order according to the enlisted criteria together with 1 valid proof of payment (PoP) and a signed, stamped Metsimaholo reference form.</p> <p>Valid appointment letter / official order with signed and stamped Metsimaholo reference form</p> <p><i>6 or more reference letters = 30 points</i></p> <p><i>5 or more reference letters = 17 points</i></p> <p><i>4 reference letters = 13 points</i></p> <p><i>3 reference letters = 10 points</i></p> <p><i>2 reference letters = 7 points</i></p> <p><i>1 reference letter = 3 points</i></p> <p><i>0 = reference letter = 0 points</i></p>	
Only bidders who achieve the 80 points threshold shall proceed to be evaluated on stage 3.		

- a) Failure on the part of a bidder to submit the appropriate proof or document required to claim preference point together with the bid, will be interpreted to mean that preference points are not claimed, but shall not result into disqualification of the bidder.
- b) The municipality reserves the right to require of a bidder, either before a bid is adjudicated or

at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

4. Final Award

Bidder who obtains highest combined total points on Price and Preference points shall be awarded the contract. Metsimaholo Local Municipality reserves the right not to appoint or to appoint one service provider for this project.

Due diligence review of the information submitted by the bidders shall be conducted without prior notice to any bidder during the evaluation process and before the awarding of the contract.

5. Bid Validity Period

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

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