



KAROO HOOGLAND

MUNISIPALITEIT / MUNICIPALITY



REQUEST FOR FORMAL WRITTEN PRICE QUOTATIONS

Procurement from R30 000.00 up to a transaction value of R200 000.00(incl VAT)
(For Publication on Karoo Hoogland Website and Notice Boards)

QUOTATION NUMBER : SCM/PMS/001/010/2017

ADVERTISING DATE : 4 OCTOBER 2017

CLOSING DATE: 16 OCTOBER 2017(12H00)

Karoo Hoogland Municipality hereby invites all interested Qualified Service Providers to furnish us with written quotations for the supply of the services as detailed in the enclosed schedule.

The quotation must be submitted on the letterhead of your business quoting the above quotation number not later **than 16 October 2017 at 12H00.**

PROJECT NAME: APPOINTMENT OF SERVICE PROVIDERS TO REVIEW, DEVELOP AND IMPLEMENT A PERFORMANCE MANAGEMENT FRAMEWORK AS PER SPECIFICATIONS

The quotation can either be hand delivered in a sealed envelope marked with quotation number to: **The SCM Practitioner, Karoo Hoogland Municipality Offices, 7 Mulder Street, Williston, 8920** or emailed to **karoadmin@karoohoogland.gov.za** or **d.vermeulen@karoohoogland.gov.za** for the attention of the **SCM Office**. Please specify in your email or on your sealed envelope the **Quotation Number** stated above.

- **TERMS OF REFERENCE ATTACHED (SCOPE OF WORK)**

The following conditions will apply:

- Price(s) quoted must be valid for at least sixty (60) days from closing date of quotation.
- Price(s) quoted must be firm and must be inclusive of VAT.
- A firm delivery period must be indicated after receiving the initial order.
- Bidders must complete the following forms: (obtainable from the municipal SCM office and submit it with their quotation)
 - MBD4 (Declaration of Interest)
 - MBD 6.1 (B-BBEE Status Level)
 - MBD 8 (Declaration of Bidders past supply chain management practices)
 - MBD 9 (Certificate of independent Bid determination);
- Bidders must be registered on the National Treasury Central Suppliers Database.
- Bidders must ensure that they submit a valid Tax Clearance and B-BBEE Certificate.
- Quotations between **R 30 000** and **R 200 000 (Vat Incl)** will be evaluated using **80/20** preferential system.

NB: No quotation will be considered from persons in the service of the state!

Failure to comply with these conditions may invalidate your offer.

Yours faithfully

SCM Department

Tel: 053 3913 003 / d.vermeulen@karoohoogland.gov.za

TERMS OF REFERENCE FOR THE PROJECT WITH SCOPE OF WORKS

PRICING SCHEDULE

ITEM NO.	DESCRIPTION OF SERVICES	QUANTITY
	REQUEST SERVICE PROVIDER TO PROVIDE THE FOLLOWING SERVICES:	
1	Request service provider to review organisational performance management framework (PMS, ANNUAL PERFORMANCE REPORT AND SDBIP) as per below specification	1
2	Development of a new Performance Management/System Framework and SDBIP (Appropriate linkage of Performance targets to the IDP, Council OPMS, Annual Budget and SDBIP)	1
3	Implementation of the Performance Management System	1
4	Populating the reporting templates	1
5	Developing a PMS policy, PMS review and monitoring Strategy and a PMS Plan as well as a manual for monitoring, evaluating, reporting and reviewing the performance for officials	1

PLANNING BRIEF

REVIEW, DEVELOP AND IMPLEMENT A PERFORMANCE MANAGEMENT FRAMEWORK FOR KAROO HOOGLAND MUNICIPALITY : TERMS OF REFERENCE

INTRODUCTION

In terms of Section 38 of the Municipal System Act (Act 32 of 2000), municipalities are required to develop a system which will promote a culture of performance among its political office bearers and administration. PMS also enable the municipality to administer its affairs in an economical, effective, efficient and accountable manner.

The other legislation pertaining to the PMS preparation includes but not limited to, the Municipal Planning and Performance Management Regulations, 2001, (Section 7, 9, 10, 11, 12 and 13) which further instructs municipalities to ensure that its PMS demonstrates how the system will operate and be managed from the planning stage up to stages of performance evaluating, monitoring and reporting and also determines the frequency of reporting and all lines of accountability.

The implementation of PMS allows the municipality to collect, process, organize, analyse, audit, reflect and report on performance information. It also allow the municipality to take practical steps to improve its performance.

It is within that basis that the Municipality intends to review the current Performance Management Framework in order to monitor, review, improve or develop a new framework to ensure the implementation of its SDBIP and IDP and to gauge the process made in achieving the objectives as set out in the IDP.

PURPOSE

Karoo Hoogland Municipality want to procure the services of an appropriately Qualified service provider to assist with the review and or developing and implementation of its Performance Management Framework and SDBIP.

EXPECTATIONS

- I. It is expected that the successful service provider will assist the municipality to review its Performance Management Framework that adhere to the core components of the PMS/SDBIP as spelt out in Section 38 of the MSA and the Municipal Planning and Performance Regulation No 796 dated 21 August 2001.
- II. If the PMS do not adhere to the above, to identify all the short comings and develop a new framework.
- III. Define the roles and responsibilities for the Managers, PMS Manager, Internal Auditors, Audit/PMS Committee, Mayor and Councillors.
- IV. Differentiate the OPMS and the individual PMS and devise innovative ways of cascading the PMS to the permanent staff.
- V. Review or develop user-friendly performance reporting templates (monthly, quarterly and annually performance reporting templates).
- VI. Developing a PMS policy, PMS review and monitoring Strategy and a PMS Plan.
- VII. The successful service provider will also be required to provide a manual and learning material for officials, management and councillors on:
 - a. The implementation of the Performance Management System;
 - b. Appropriate linkage of performance targets to the IDP, Council OPMS, Annual Budget and SDBIP;
 - c. Populating the reporting templates;
 - d. Understanding the PMS;
 - e. Understanding individual score cards,
 - f. Evaluation and reporting on the PMS;
 - g. Reviewing and monitoring of the PMS.

EXISTING INFORMATION

The following information should be taken into account, but should not be limited to the following:

- ✓ Karoo Hoogland Current PMS Framework
- ✓ Karoo Hoogland Annual Performance Report 2016/2017
- ✓ 2017/2018 IDP
- ✓ 2015/2016 Annual Report
- ✓ Budget 2017/2018
- ✓ SDBIP 2017/2018
- ✓ Performance Agreements of Municipal Manager and Senior Managers
- ✓ Schedule of Key deadlines for the IDP and Budget Process 2018/2019
- ✓ Spatial Development Framework of 2011
- ✓ New SCOA(Standard Chart of Accounts) Regulations and Circulars from National Treasury

METHODOLOGY

A Detailed Project Plan and step by step methodology relevant to the proposed assignment with time frames is requested from the service provider's proposal.

PROJECT DURATION

The project should be finalised by 15 December 2017

EVALUATION CRITERIA / FUNCTIONAL ADJUDICATION CRITERIA

In addition to the statutory weightings in procurement, service providers should clearly indicate and demonstrate expertise in the following:

- ✚ Individual team members’ relevant experience with references(Experience)
- ✚ Expert knowledge with relevant qualifications (Expertise)
- ✚ Time cost matrix with clear milestones and detailed project plan (Methodology)

Bidders will be evaluated on the following basis:

The assessment of functionality will be done in terms of the evaluation criteria and the minimum threshold of 60% must be met per criteria. All bidders who fail to acquire the minimum threshold of 60% per criteria will be disqualified or not considered further for financial evaluation.

The technical portion of the proposal will be evaluated and weighed in terms of functionality score as outlined hereunder:

FUNCTIONAL ASSESSMENT - POINT SCORING	
FUNCTIONAL CATEGORY & DESCRIPTION	POINTS ALLOCATION
A. EXPERIENCE	20 points
Similar type of project undertaken by the bidder	0 – 10 points
<i>Allocation :</i> <i>10 points for a similar project undertaken</i> <i>15 points for a similar project undertaken successfully</i>	0 – 10 points
B. EXPERTISE	20 points
Expert Knowledge (Qualifications)	0 – 10 points
Relevant experience	0 – 10 points
C. METHODOLOGY	10 points
Detailed Project Plan and milestones with Time Cost matrix	0 – 10 points
Detailed content and project plan – 5 points	
Practical presentation - 5 points	
<i>Bidders should take note of the above technical (quality) evaluation criteria.</i>	
A. Experience : The experience annexure must be complete. Firstly list projects of a similar nature undertaken and then any other project undertaken for Municipalities.	
B. Expertise : Proof of qualifications of the team to undertake the work must be provided for evaluation purposes.	
C. Methodology : The bidder must clearly demonstrate how the contract will be managed, detailing a work plan with time frames and costing and clearly explain how the work will be implemented with the end date.	

FINANCIAL EVALUATION – POINT SCORING

The evaluation will be performed on 80/20 principles as Provided in PPFA :

Price :	80 points
B-BBEE status Level Contributor	20 points
Total	100 points

PROPOSAL FOR SERVICES

Proposal to provide a service based on this Terms of Reference must contain details on the following:

- i. General Approach and Methodology;
- ii. Professional Team (with CV's);
- iii. Detailed Costs and Time Breakdown;
- iv. Company Registration Certificate;
- v. Valid Tax Clearance Certificate;
- vi. Directors ID Copy;
- vii. B-BBEE Certificate;
- viii. MBD forms
- ix. Project implementation Plan

Failure to submit the above will result in the disqualification of the quotation.

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DELIVERY ADDRESS

Karoo Hoogland Municipality
7 Mulder Street
Williston
8920