

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



REQUEST FOR PROPOSALS

**DEVELOPMENT OF AN INTERGOVERNMENTAL RELATIONS
STRATEGY, POLICY FRAMEWORK & IMPLEMENTATION PLAN FOR THE
HDA**

RFP/JHB/032

**PROPOSALS TO BE SUBMITTED BY
NOT LATER THAN
12 NOON ON MONDAY, 28 NOVEMBER 2011**

November 2011

TERMS OF REFERENCE (TOR) FOR SERVICES

1. INTRODUCTION AND PURPOSE

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. At the launch of the HDA on 02 March 2009 the Minister set out some of the priority objectives of HDA as follows:

- ❑ *Facilitate and assist* the state and government in the realisation of the provision of access of all citizens to adequate housing;
- ❑ Introduce and manage a land inventory and *information management system*;
- ❑ Conclude *collaborative agreements* with key and strategic state and municipal sectors to secure land assets;
- ❑ *Provide facilitation and capacity support* to provinces and local authorities in providing housing;
- ❑ *Facilitate* the introduction of a state and municipal moratorium on the sale of land pending prioritisation of land for human settlement development;
- ❑ Ensure and *monitor* centrally *coordinated planning* and *budgeting* of all infrastructure required for housing development, and *provide and coordinate funding* for all infrastructure for projects undertaken by the HDA; and

Specifically, the HDA Act sets out the objects, role and functions of the Agency. Accordingly, the HDA's strategic objectives can only be successfully achieved through effective application and optimisation of section of Chapter 3 of the RSA Constitution (section 41(1)(h)(i)), which outlines that co-operation between spheres of Government should take place in mutual trust and good faith, as well as the Intergovernmental Relations Framework Act of 2005 and section 6(4) of the HDA Act.

The Housing Development Agency hereby invites professional service providers to submit proposals for the development of an Intergovernmental Relations Strategy, Policy Framework and implementation plan as outlined in this terms of reference document.

2. OBJECTIVES OF THE PROJECT

The goal of this initiative is to develop a comprehensive Intergovernmental Relations (IGR) Strategy, Policy Framework and a Medium-term Implementation Plan for the HDA. The purpose of the initiative is to inform and guide the HDA's interactions with stakeholders and partners in the implementation of its objections, mandate and functions. Furthermore, this will support the HDA in fulfilling its functions, and to overcome some of the challenges, which include: misalignment of fiscal arrangements with HDA's mandate; lack of awareness of HDA's existence and/ or mis-understanding of its mandate, functions and service offering.

The IGR Strategy, Policy Framework and Implementation Plan must be address itself to the following legal and policy realities:

- the IGR Act of 2005, which sets up structures and institutions to support intergovernmental relations. These structures and institutions focus on service delivery, public accountability, co-ordination and integration, alignment of planning, budgeting, effective implementation, dispute resolution and sustainable development across the three spheres of Government.
- The Inter-Governmental Fiscal Relations, Annual Division of Revenue and related fiscal policy and programme
- The Housing Act, HDA Act, Of 2008

Development of the IGR Strategy, Policy framework and Implementation plan is aimed at supporting the HDA's realising its mandate through optimising the intergovernmental relations domain.

3. CRITICAL MILESTONES/ DELIVERABLES

The following milestones/ deliverables are necessary phases of the project:

- i. Perform an IGR Audit for HDA, assessing the existing IGR challenges, and recommend appropriate interventions. The assessment should also look into IGR progress made since the inception of the Agency, and identification of potential performance indicators to measure. It will also cover the following :
 - ✓ Analysis of all HDA stakeholders in the country;
 - ✓ Stakeholder mapping and prioritisation
 - ✓ Stakeholder interest/ focus/ agenda to be pursued;
- ii. Establish (define)/ strengthen the HDA's stakeholder outreach governance/ management system;
- iii. Develop Intergovernmental fiscal relations strategic agenda, which will ensure alignment of the IGR framework with government's budgeting & planning cycle;
- iv. Establish an IGR knowledge management system, which will include:
 - ✓ Capture the interactions with IGR stakeholders (outcomes of meetings and next steps)
 - ✓ IGR communication and outreach programme, aimed at enhancing stakeholder's appreciation of the HDA;
 - ✓ Harnessing, shaping & synthesizing knowledge to inform advisories, briefings & stakeholder engagements by the HDA;
- v. Develop a IGR monitoring and evaluation system for the HDA; which will cover:
 - ✓ Regular performance management & reporting system on progress
 - ✓ Sector environmental scan, developments and implications
 - ✓ Value capture/ value for money barometer or similar

- vi. Define an IGR strategic thrust and focus in support of the HDA core service areas.
 - ✓ Land assembly support
 - ✓ Programme & Project Technical Support programmes
 - ✓ Finance and Fiscal mobilisation

- vii. Develop systems and processes to sustain/ support the implementation of IGR key objectives of coordination, integration and alignment of planning, budgeting, implementation and reporting across three spheres of government. This will include :
 - ✓ tools and templates for periodic stakeholder engagement monitoring;
 - ✓ official criteria to assist in the identification of meaningful development partners;
 - ✓ Protocols for engagement;
 - ✓ Align the IGR framework with the organisational strategy.

4. RELEVANT SKILLS AND EXPERIENCE

The proposal should provide the following:

- ❑ A description of the service provider's methodology to perform tasks set forth in these terms of references, including the proposed workplan;
- ❑ A description of the service provider's organisation and an outline of recent experience on assignments of similar nature, including the name of the institution where a similar project was undertaken, the project name; value of the project awarded; year awarded and year completed.
- ❑ Service providers must ensure that people with relevant skills and sufficient experience are part of the project. Curriculum vitae's of professional staff to be involved in the project should be included, and should include the degree of their involvement in various previous assignments.

5. PROJECT DURATION AND PAYMENT ARRANGEMENTS (REMUNERATION)

- ❑ This project should be completed by 30th January 2012, with final product delivered by 15 February 2012. Due to the significance of the project, all work shall be submitted on time.
- ❑ Payments will only be made on the basis of the work completed (milestones/ deliverables) as per the project implementation plan to be agreed at the inception of the project.

6. GENERAL

During the execution of the project, the service provider must submit regular progress reports at intervals as determined by the Project Manager. All information captured and/or used to generate the outputs of the projects

remains the property of HDA and must be handed over in its totality when the project is closed. HDA will retain copyright and all associated intellectual rights thereof. This document together with all agreements to be reached during the course of the project will become part of the contract.

7. CONTRACT SIGNING

HDA shall enter into a legally binding contract with the successful bidder, in addition to the letter of appointment.

8. PROJECT MANAGEMENT

All matters related to the project management of this contract shall be directed to the Project Manager in the IGR & Strategy Alignment Department (Mr Joseph Leshabane, 011 544 1017, joseph.leshabane@thehda.co.za)

9. BID EVALUATION PROCESS

The HDA will undertake the evaluation of the proposals through its officials, who will administer the evaluation process. The evaluation will be based on the assessment of the proposal submitted. Once a service provider has been decided upon, and the process been finalised, the service provider(s) will receive a letter confirming the outcome of their bids (appointment to provide the service or unsuccessful outcome, as the case may be)

9.1. TECHNICAL (FUNCTIONALITY) CRITERIA

Compliant proposals and quotations will be evaluated on the basis of the submitted bid. Prospective service providers should be aware that their proposal(s) will be evaluated against the following technical (functionality) criteria:

Stage 1 Evaluation: Scorecard – Table 1

| | Evaluation criteria | Max points |
|--------------------|--|-------------------|
| 1. | Expertise and related experience in executing similar projects | 40 |
| 2 | Quality of the project proposal | 20 |
| 3 | Functionalities and capabilities of the proposed project team | 10 |
| 4 | Methodology to be used and rationale therefore | 30 |
| Total score | | 100 |

It is important to note that only Bids scoring a minimum threshold score of 80 points in terms of the above evaluation criteria will be considered for stage 2 evaluation (outlined in 9.2 below).

9.2. BEE and COST EVALUATION CRITERIA

The following table demonstrates the criteria to be used for allocation of BEE and cost points.

Stage 2 Evaluation: Price and BEE – Table 2

| CRITERIA | SUB-CRITERIA | WEIGHTING/ POINTS |
|--------------|---|-------------------|
| Price | Price of the bid | 80 |
| BEE | Equity ownership by HDI | 12 |
| | Equity ownership by women | 4 |
| | Equity ownership by disabled (proof to be provided from a qualified practitioner) | 4 |
| TOTAL | | 100 |

HDI evaluation: The HDI proposal will be evaluated as per PPPFA regulations.

****If points are claimed for disabled persons, indicate nature of impairment and medical certificate/proof must be submitted.****

10. GENERAL

10.1. Below are compulsory requirements for this service

10.1.1. It is important to note that the successful person will work under the supervision of a HDA representative, abide by HDA’s Code of Conduct, and other organisational guidelines.

10.1.2. Kindly complete and submit the HDA Supplier Registration form if not already on our database and submit together with:

10.1.3. Valid original tax clearance certificate.

10.1.4. SBD Forms (SBD4, SBD6.1, SBD8 and SBD9) obtainable from HDA Website:

www.thehda.co.za/procurement. Under compliance checklist.

10.1.5. Total Cost (Price) Quotation

10.1.6. Be prepared to demonstrate competency by revealing details of previous similar work done, for purposes of referencing by the evaluation committee

10.1.7. Operate as a legal entity in terms of the Companies Act.

- Further information regarding technical matters can be sent via email to: Joseph.Leshabane@thehda.co.za or at tel: 011 544 1000, and
- Further information regarding supply chain matters/ queries can be send via email to: Jabulile.Mndebele@thehda.co.za or at tel: 011 544 1000.

11. TERMS AND CONDITIONS

11.1. The HDA undertakes to pay in full within thirty (30) days, all valid claims for work done to its satisfaction upon presentation of a substantiated claim/invoice.

11.2. No payment will be made where there is an outstanding information/work by the service provider/s.

12. SUBMISSION OF PROPOSAL

12.1. Proposals should be submitted on or before the **28 November 2011 by no later than 12h00** to the following address:

The Procurement Officer

The Housing Development Agency

Block A, Riviera Office Park, 6-10 Riviera Road, Killarney, 2193

Tel: 011 544 1000

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