

REQUEST FOR QUOTATION

PROVISION OF CONSULTANCY SERVICES FOR REVIEW, DEVELOPMENT AND IMPLEMENTATION OF A STRATEGY AND PERFORMANCE MANAGEMENT SYSTEM – BALANCED SCORE CARD

RFQ NUMBER:	RFQ NHC/2023/24/157
RFQ ISSUE DATE:	17 October 2023
CLOSING DATE AND TIME:	20 October 2023 @ 11:00
COMPULSORY BRIEFING SESSION	Not required

SUPPLIERS ARE REQUESTED TO PLEASE SUBMIT A QUOTATION ON THE COMPANY LETTERHEAD FOR THE FOLLOWING:

No	Item Description	Quantity	Unit of Measure
4.1.	Provision of consultancy services for review, development and implementation of a strategy and performance management system – Balance Score Card as per specifications attached		

ITEM DESCRIPTION	DETAILED INFORMATION
RFQ VALIDITY PERIOD	30 days (COMMENCING FROM THE RFQ CLOSING DATE)
COMPULSORY REQUIREMENT	<ul style="list-style-type: none"> - Valid current Tax compliance status pin code for verification of tax compliance status with SARS. - Only suppliers registered on the Central Supplier Database (CSD) will be considered. Suppliers must include with their quotation / proposal their Master Registration number as proof of registration on CSD - Completed and signed Standard Bidding Documents (SBD) forms included with the bid document / RFQ.
SUBMISSION OF QUOTES	e-mail to: procurement@nhc.org.za
CONTACT PERSON FOR ENQUIRIES	Ms. Palesa Kadi p.kadi@nhc.org.za and cc procurement@nhc.org.za

INTRODUCTION

1. PURPOSE OF THE REQUEST

NHC seeks to invite quotations for the procurement of goods and/or services as stated above.

2. NHC's TERMS AND CONDITIONS OF REQUEST FOR QUOTATION (RFQ)

- 2.1. NHC's conditions of purchase shall apply.
- 2.2. The validity period of the quotations must be clearly stated on the quotation.
- 2.3. Prices quoted shall be in South African Rand and inclusive of VAT as well as any associated costs such as delivery, insurance, taxes, etc.
- 2.4. No price adjustments or amendments will be considered by the NHC after closure of the RFQ.
- 2.5. The supplier accepts full responsibility for the proper execution and fulfilment of the goods or services quoted for.
- 2.6. NHC reserves the right to accept or reject any special terms and conditions that may qualify the goods or services to be provided.
- 2.7. The NHC reserves the right to accept or reject a proposal in whole or in part.
- 2.8. Where the NHC determines that it will be in the best interest of the project to appoint multiple suppliers, the NHC reserves the right to award the RFQ to multiple suppliers by indicating on the purchase order, the items applicable.
- 2.9. Quotations shall be submitted on an official letterhead and duly signed.
- 2.10. Goods or services shall be supplied / rendered upon receipt of an official purchase order from the NHC. No services must be rendered or goods delivered before an official NHC purchase order or service level agreement (SLA) signed.
- 2.11. The General Conditions of Contract (GCC) issued by National Treasury are applicable.
- 2.12. Only quotations from suppliers that comply with the specifications and indicate the date of delivery or expected date of service delivered, shall be evaluated and considered.
- 2.13. The NHC reserve the right to do due diligence on the quotations.
- 2.14. The NHC reserves the right to benchmark prices quoted.
- 2.15. Late and / or incomplete submissions will not be accepted.
- 2.16. NHC shall pay within 30 days after receipt of an invoice.
- 2.17. All invoices must be submitted to SCM via the email to procurement@nhc.org.za.

3. EVALUATION CRITERIA

All quotations will be evaluated based on compliance with compulsory requirements, compliance with specifications / Terms of Reference and the 80/20 preference point system prescribed by the Preferential Procurement Policy Framework Act 5 of 2000 and its Regulations as amended in 2022, please see SBD 6.1.

The breakdown of the scoring is included in the Standard Bidding Document (SBD) 6.1. Suppliers are required to complete the SBD 6.1 to indicate the points claimed as required.

IMPORTANT: Suppliers to failed to claim points on SBD 6.1 will score zero by default.

Your assistance and co-operation is appreciated.

Kind Regards

Ms. Nompumelelo Ndlovu
Supply Chain Intern
National Heritage Council of South Africa
353 Festival Street
Hatfield
0028
Tel: 012 748-3930
Email: procurement@nhc.org.za

RE: REQUEST FOR A QUOTATION – PROVISION OF CONSULTANCY SERVICES FOR REVIEW, DEVELOPMENT AND IMPLEMENTATION OF A STRATEGY AND PERFORMANCE MANAGEMENT SYSTEM – BALANCED SCORE CARD

1. BACKGROUND

The National Heritage Council (NHC) seeks to appoint a service provider that will provide support strategic management services in the areas of Strategic Planning and Performance Management.

The NHC is a juristic entity established in terms of the National Heritage Council Act of 1999 (Act 11 of 1999), responds to the PFMA requirements and upholds corporate governance principles for guidance from King IV Report. Whilst NHC is a schedule 3A entity, the shareholder compact requires key performance measures and indicators that are linked to the NHC mandate. As a result, NHC Council requires a facilitator with experience to create a robust strategic planning session focusing on identification of priorities that will determine the future NHC that is responsive to new public sector challenges. The NHC is expected to introduce new and innovative strategies which will foster new beneficial partnerships and engineer a resilient and financially viable schedule 3A public entity.

2. SERVICES REQUIRED

A service provider with experience in public sector strategic and performance management is required to facilitate and align the NHC strategy using best practices to produce and an agile and impactful strategic plan and Annual Performance Plan 2024/25. This calls for an expert with but not limited to; international, national heritage management, cultural diplomacy, shareholder compact alignment and balanced score card development.

3. EXPECTED OUTCOMES

The expected outcome of the initiative is improved and streamlined organizational and employee productivity and impactful reporting, monitoring and evaluation.

In terms of strategic planning the expected outcomes are the Revised 2020/21 – 2024/25 Medium Term Strategic Framework (MTSF) and the 2024/25 Annual Performance Plan (APP) in line with the Revised Framework for Strategic Plans and Annual Performance Plans and produce a balance scorecard that is aligned to the

Strategy and APP. The service provider will be expected to provide an appraisal of the MTSF and conduct a workshop with Council and members of staff on {which date}.

4. KEY COMPETENCIES

- (a) Experience in management and development of heritage institutions
- (b) Experience in board leadership and governance of a heritage institution, experience in a world heritage site will be an advantage
- (c) Positioning of a heritage institution in a hostile economic environment and provide innovation.
- (d) Unlocking of economic potential of NHC for organizational sustainability and relevance.
- (e) Commercialisation of intellectual properties and resourceful partnerships.
- (f) Proven record of working with international bodies – UNESCO and related organizations
- (g) Should be familiar with merger and amalgamation of public entities
- (h) Beneficial alignment with similar and related entities.
- (i) In depth understanding of public sector legislation and related performance reporting standards
- (j) Capacity to align strategy with the balance score card.

5. EVALUATION CRITERIA

- (a) The service provider will be procured through a quotation process
- (b) The service provider must have traceable references where it has successfully performed similar services.

- (c) The service provider must possess high levels of skills, exposure to the sector and a qualification in heritage
- (d) Functionality is a priority

6. COMPULSORY REQUIREMENTS

- (a) The service provider is required to submit with the quotation, a comprehensive detailed CV of the facilitator that demonstrate the key competencies as outlined above.
- (b) The service provider must submit a company profile that includes the track record of the company with the quotation
- (c) The service provider must submit at least three (3) written reference letters from other companies that confirm the quality of service received, the project description, value of the contract and date of project completion for similar services rendered in the past three (3) years.

7. ADDITIONAL INFORMATION

Engagements pertaining to this contract will be held in Gauteng, should your company be appointed for this service, you will be expected to take care of own travel and accommodation to the chosen venue for the strategy to be held on 27 October 2023 in Pretoria. Venue to be confirmed.

The deadline for submission of quotation is on 20 October 2023 at 11:00

ENQUIRIES

All enquiries should be sent via email to: p.kadi@nhc.org.za cc procurement@nhc.org.za.

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature	Date
.....
Position	Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) The **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$
Where		
Ps	=	Points scored for price of tender under consideration
Pt	=	Price of tender under consideration
Pmin	=	Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$

Where

Ps	=	Points scored for price of tender under consideration
Pt	=	Price of tender under consideration
Pmax	=	Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
B-BBEE Compliance Based on Section 10 of the B-BBEE Act (Act 53 of 2003 as amended by Act 46 of 2013)	4 Level 1-2 = 4 pts Level 3-4 = 3 pts Level 5-6 = 2 pts Level 7-8 = 1 pt Non-compliant contributor = 0	15 Level 1 = 15 pts Level 2 = 13 pts Level 3 = 12 pts Level 4 = 10 pts Level 5 = 8 pts Level 6 = 6 pts Level 7 = 4 pts Level 8 = 2 pts Non-compliant contributor = 0		
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DECLARATION WITH REGARD TO COMPANY/FIRM

- 4.3. Name of company/firm.....
- 4.4. Company registration number:
- 4.5. TYPE OF COMPANY/ FIRM
- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety

- ☐ Close corporation
 - ☐ Public Company
 - ☐ Personal Liability Company
 - ☐ (Pty) Limited
 - ☐ Non-Profit Company
 - ☐ State Owned Company
- [TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:
DATE:
ADDRESS:

