

TERMS OF REFERENCE

**FOR THE PROVISION OF CHANGE MANAGEMENT EXPERTISE TO THE GOVERNMENT
TECHNICAL ADVISORY CENTRE OVER 24 MONTHS**

BACKGROUND INFORMATION

Programme Identification

Name of Client	Government Technical Advisory Centre (GTAC)
Name of Project	Change Management Expertise
Contracting Authority	Government Technical Advisory Centre (GTAC)
Accountable Officer	Ronette Engela: Accounting Officer, GTAC
Budget Manager	Emmanuelle Gille: Chief Director - Institutional Development Support
Project Purpose	GTAC seeks to appoint a Change Management Specialist to support various projects over two years.

Contents

1. BACKGROUND INFORMATION	3
2. PURPOSE.....	3
3. TECHNICAL EXPERTISE REQUIRED.....	3
3.1 Change Management	4
3.2 Communications	4
3.3 Deliverables	4
4. LOGISTICS AND SCHEDULE OF THE ASSIGNMENT	4
4.1 Logistical Support	4
4.2 Sub-Contracting	4
4.3 Time Frame	4
5. SUBMISSION REQUIREMENTS	5
6. EVALUATION CRITERIA	5
6.1 Evaluation Phases/Methodology	5
6.1.1 Stage 1a: Administrative Compliance (Non Disqualification).....	6
6.2 Tax Clearance Status	7
6.2.1 Stage 1b: Mandatory Compliance (Disqualification)	7
6.2.2 Phase 2: Desktop Evaluation	8
6.2.3 Phase 3: Price and Specific Goals Evaluation	9
7. FINANCIAL IMPLICATIONS.....	11
8. CONTRACTING AUTHORITY	11
9. OTHER BID CONDITIONS	11
10. BID VALIDITY PERIOD.....	11
11. LEGAL IMPLICATIONS.....	11
12. CLARIFICATIONS.....	11
13. COMMUNICATION.....	12
14. COUNTER CONDITIONS.....	12
15. PROHIBITION OF RESTRICTIVE PRACTICES	12
16. BENEFICIAL OWNERSHIP	13
17. SUBMISSION DETAILS	13
CONTACT DETAILS	14

1. BACKGROUND INFORMATION

GTAC is a government entity promulgated through a Legal Notice (35194) published in the Government Gazette on 30 March 2012. It is an agency of the National Treasury, established to assist Organs of State in building their capacity for efficient, effective and transparent financial management.

The functions of GTAC are:

- To render technical consulting services to the Centre of Government Departments and Organs of State;
- To provide specialised procurement support for high–impact government initiatives;
- To render advice on the feasibility of infrastructure projects;
- To provide knowledge management for projects undertaken; and

GTAC's Founding Notice indicates that it provides services to its clients through agreements with the National Treasury, centre–of–government departments and organs of state. GTAC implements its mandate through a client–focused and predominantly project–based approach and collaborates with partners inside and outside government in the development and delivery of its services.

More information on the organisation and its work may be found on the GTAC website (www.gtac.gov.za).

2. PURPOSE

The purpose of these Terms of Reference is to contract with one (1) individual with the requisite technical expertise in Change Management to provide support to GTAC projects over two years.

3. TECHNICAL EXPERTISE REQUIRED

The technical expertise required ranges across various projects across government departments. Generally, the required areas of expertise include:

3.1 Change Management

- Develop Change Management Strategies aligned with project objectives.
- Conduct baseline change readiness assessments for various functions.
- Design and implement targeted change interventions to address gaps.
- Support the execution of change management activities across all project phases.
- Conduct follow-up readiness assessments to measure progress.
- Provide advisory support for post-legal separation change management.

3.2 Communications:

- Develop a project communication plan/strategy.
- Establish and support communication forums for internal and external stakeholders.
- Prepare communication messages for defined media channels.
- Facilitate feedback mechanisms to monitor communication effectiveness.

3.3 Deliverables

- Approved Change Management Strategy.
- Baseline and follow-up change readiness assessment reports.
- Targeted intervention plans and implementation reports.
- Project communication plan and supporting materials.
- Quarterly progress reports to the Project Managers.

4. LOGISTICS AND SCHEDULE OF THE ASSIGNMENT

4.1 Logistical Support

The service provider will be responsible for:

- The provision of any office facilities, including computers, software licenses, telecommunications and stationery and administrative support as required,
- Own transport and mobile communications.

All costs for project-related travel will be covered by GTAC.

4.2 Sub-Contracting

The work that the service provider will be contracted to do shall not be subcontracted.

4.3 Time Frame

The appointment period will be from 1 January 2026 up to 31 December 2027.

The estimated time requirement during this period is calculated at 650 hours (or 81 days).

5. SUBMISSION REQUIREMENTS

Applicants are required to indicate the following:

1. An **hourly rate inclusive of VAT** (if applicable), not exceeding **R1,500.00** (one thousand five hundred Rand).
2. An indication of whether the bidder is contracting **individually or through a company**.
3. All required **CV information** as stipulated in section 3 and table 4 must be entered into the e-procurement system.
4. **Copies of the qualifications** relevant to criterion 1 in Table 4; and
5. Organisations **submitting CVs on behalf of their employees** should submit no more than one (1) CV. If an organisation submits more than 1 CV, only the first CV shall be considered for evaluation.

6. EVALUATION CRITERIA

GTAC has set minimum standards that bidders must meet to be selected as the successful bidder.

The successful bidder will be awarded the contract for the **above** duration of the service requirements and will be selected based on the following three-phase process:

6.1 Evaluation Phases/Methodology

Table 1: Evaluation Phases

Evaluation Stage	Description
Phase 1	Stage 1A: Administrative Compliance – Non Disqualifying A bidder is required to submit the administrative compliance documents as referred to in paragraph 8.1.1. Stage 1B: Mandatory Compliance – Disqualification/ Pre-Qualification Failure to submit any of the required mandatory documents will lead to disqualification. Refer to paragraph 8.1.2,
Phase 2	Technical Evaluation: Desktop Evaluation

	<p>Bidders must submit information as per the Bid Submission Requirements. The submitted technical proposal must respond to the Technical Evaluation criteria cited in these Terms of Reference.</p> <p>The Technical proposal will be evaluated out of 100% with a Threshold of 70%. Only bidders who meet the threshold will be considered for the Price and Specific Goals evaluation.</p>
Phase 3	<p>Price and Specific Goals</p> <p>Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 8. Bidders must provide the required information for evaluation purposes.</p>

It should be noted that the stages are considered to be separate processes. These three phases are mutually exclusive and will be treated as such in the appraisal.

6.1.1 Stage 1a: Administrative Compliance (Non Disqualification)

During this phase, bid documents will be reviewed to determine compliance with tax matters and the Central Supplier Database (CSD) at the closing date and time of the bid. Bidders must submit all returnable documents as outlined in the table below using the designated electronic e-procurement system

Table 2: Bid requirements compilation and submission:

Document to be submitted	Requirement
SBD 1- Invitation to Bid	Complete the supplied pro forma document on the e-procurement system.
SBD 4 - Bidder's Disclosure (Refer to note below)	Complete the supplied pro forma document on the e-procurement system.
<p>Note:</p> <p>Bidders must complete the SBD 4 document as provided on e-procurement. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form:</p> <ul style="list-style-type: none"> - "Person" means a bidder or supplier or shareholder, director, trustee, partner, or member of a bidder or supplier having the controlling interest in the bidder or supplier. - "State" means a national or provincial department, a national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament 	

Document to be submitted	Requirement
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SBD 6.1 - Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022.	<p>Complete the supplied pro forma document on e-procurement system i.e SBD 6.1 and Specific Goals tab as provided on the e-procurement system.</p> <p>Failure to complete the SBD 6.1 will result in the bidder forfeiting points for specific goals.</p>
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6.2 Tax Clearance Status

A valid tax PIN / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Bidder's tax matters must be compliant at the time of award. In the case where a bidder's tax matters are non-compliant, a bidder will be given a maximum of seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

No award shall be made to a bidder whose tax affairs are not in order.

GTAC reserves the right to withdraw an award made or cancel a contract concluded with a successful bidder if it is established that such bidder was not tax compliant at the time of the award.

GTAC further reserves the right to cancel a contract with a successful bidder if such bidder does not remain tax compliant for the full term of the contract.

6.2.1 Stage 1b: Mandatory Compliance (Disqualification)

Bidders must submit a responsive proposal in accordance with these terms of reference and below the minimum prequalification. Failure to adhere to any of these requirements will result in disqualification:

- a. Bidders must be registered on the Central Supplier Database (CSD) on the closing date of the Request for Quotation (RFQ).
- b. Submission of a technical proposal is required. A bidder is required to submit no more than one (1) CV. If a bidder submits more than 1 CV, only the first CV shall be considered for evaluation.
- c. Submission of a price/financial proposal is required as per SBD 3.3, and must be completed as indicated in the e-procurement portal

- d. Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered. i.e., if a bidder representative is in the employment of the state, such a bid proposal will not be considered.

6.2.2 Phase 2: Desktop Evaluation

- a. Bids will be evaluated strictly in accordance with the bid evaluation criteria stipulated in this ToR.
- b. In a case where there is a difference between the contents of this ToR and the e-procurement system, the ToR takes precedence.
- c. Proof of Qualifications: Bidders must upload qualification certificates as well as all required certificates. Certified copies will be requested in the event that the bid is successful and before an agreement can be concluded.
- d. Please note that a Certificate of Membership shall not be deemed as proof of educational qualification (Education qualifications refer to certifications issued by an institution of higher learning, e.g., certificate, diploma, degree, etc.)
- e. Non-submission of qualifications will lead to a score of zero for the qualifications technical criterion.
- f. All international qualifications must be accompanied by South African Qualifications Authority (SAQA) Accreditation.
- g. Non-submission of SAQA confirmation will lead to a score of zero for the qualification's technical criterion.
- h. A maximum of one (1) CV will be evaluated per bid. If more than one CV is submitted per bid, the first CV will be evaluated.

The Desktop Evaluation criteria are discussed in Table 4 below.

Table 4: Evaluation Criteria

No.	Evaluation Criteria	Scoring Criteria	Weight %
1	<p>Qualification</p> <ul style="list-style-type: none"> Highest Qualification (in areas of Business Administration, Organisational Development, Leadership or Change management) <p><i>Where qualifications are not submitted, or qualifications are not in the relevant field as mentioned above, a score of 0 will be awarded. Foreign qualifications without SAQA accreditation will not be considered for evaluation, and a score of 0 will be awarded.</i></p>	<p>5 = Doctoral Degree (PhD) (NQF10) 4 = Master's Degree (NQF 9) 3 = Post Graduate degree (NQF 8) 2 = Bachelor's Degree (NQF 7) 1 = National Diploma (NQF 6) 0 = non-submission of qualifications or qualifications are not in the relevant area as specified. Foreign qualifications without SAQA accreditation will not be considered for evaluation, and a score of 0 will be awarded.</p>	30%
2	<p>Change Management Experience</p> <ul style="list-style-type: none"> Number of years of experience in Change Management. <p><i>An applicant should list project management experience as indicated in the CV template.</i></p>	<p>5 = > 10 years of combined experience in Change Management 4 = 8 - 9 years of combined experience in Change Management 3 = > 6 - 7 years of combined experience in Change Management 2 = 5 - 6 years of combined experience in Change Management 1 = < 5 years of combined experience in Change Management 0 = No relevant experience</p>	30%
3	<p>Project Experience within the Public Sector (South Africa)</p> <ul style="list-style-type: none"> Number of years of experience in the Public Sector <p><i>An applicant should list project management experience as indicated in the CV template. Experience attained as an employee in government spheres will not be considered as "project experience" and will be disregarded.</i></p>	<p>5 = > 10 years of combined experience in the Public Sector (South Africa) 4 = 8 - 9 years of combined experience in the Public Sector (South Africa) 3 = > 6 - 7 years of combined experience in the Public Sector (South Africa) 2 = 5 - 6 years of combined experience in the Public Sector (South Africa) 1 = < 5 years of combined experience in the Public Sector (South Africa) 0 = No relevant Project Experience in the Public Sector (South Africa)</p>	40%
TOTAL TECHNICAL POINTS			100%
MINIMUM THRESHOLD			75%

Only bidders that meet the 75% threshold will be considered for the Price and Specific Goals evaluation in terms of the Preferential Procurement Regulation (PPR) 2022.

6.2.3 Phase 3: Price and Specific Goals Evaluation

a. The Preferential Procurement Evaluation will be based on the 80/20 principle.

- b. The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for the price as allocated in the enclosed form SBD 6.1. which must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in Table 5 below.
- c. Submission of a price proposal is required in the proforma format. (SBD 3.3). Bidders need to provide the cost per output, inclusive of VAT.
- d. GTAC reserves the right to negotiate the price offer or rates with the recommended bidder(s).

Table 5: Price and Specific Goals Evaluation Criteria

Number of points allocated (80/20 system)	
Price	80
The specific goals allocated points in terms of this tender	20
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10
Women percentage of ownership: 30% and above	10
Total Points	100

The CSD report shall be used as evidence to confirm/award points for specific goals. It is the responsibility of the bidding entity to ensure that the information on the CSD is updated.

Table 6: Definitions

Terminology	Definition
“Specific Goals”	means specific goals as contemplated in section 2(1)(d) of the Act, which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability, including the implementation of programmes of the Reconstruction and Development Programme as published in <i>Government Gazette</i> No. 16085 dated 23 November 1994;
Historically Disadvantaged Individual (HDI)	means a South African citizen: <ol style="list-style-type: none"> 1. who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) (“the interim Constitution”); and/or 2. who is a female; and/or 3. who has a disability. provided that a person who obtained South African citizenship on or after the coming into effect of the Interim Constitution is deemed not to be an HDI;

7. FINANCIAL IMPLICATIONS

As stated in the submission requirements, an hourly professional fee inclusive of VAT (if applicable), not exceeding R1,500.00 (one thousand five hundred Rand) should be provided in the SBD 3.3. In addition to the total professional fees for 650 hours. Any quotations received that exceed the R1 000 000.00 threshold for Requests For Quotations (RFQs) will not be evaluated.

8. CONTRACTING AUTHORITY

The Contracting Authority will be the Government Technical Advisory Centre (GTAC).

9. OTHER BID CONDITIONS

Prior to the appointment, the recommended service provider may be required to submit additional supporting documentation.

GTAC reserves the right to negotiate the final offer with the recommended bidder before the award.

10. BID VALIDITY PERIOD

The RFQ will be valid for sixty (60) days from the closing date of the RFQ.

11. LEGAL IMPLICATIONS

The successful service provider must be prepared to enter into a service-level agreement with GTAC.

12. CLARIFICATIONS

Requests for clarification must be made in writing by e-mail. Telephonic enquiries for clarification will not be accepted.

Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.

13. COMMUNICATION

GTAC's Professional Services Procurement (PSP) unit will only communicate with bidders by email where bid clarity is sought, to obtain information or to extend the validity period. For any enquiries, email: psp@gtac.go.za. The submission reference must be included in the subject line of the email. GTAC will only respond to email communication during business hours.

Alternatively, contact the e-procurement portal support desk at:

<https://vendorportal.gtac.gov.za/Contact>.

Any communication by the bidder (either by facsimile, letter, electronic mail or any other form of correspondence) to any government official, representative, or a person acting in an advisory capacity for GTAC in respect of this bid between the closing date and the award of the bid is prohibited.

14. COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the Information to bid by bidders will result in invalidation of such bids.

15. PROHIBITION OF RESTRICTIVE PRACTICES

In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/ are or a contractor(s) was/were involved in:

- a. Directly or indirectly fixing a purchase or selling price or any other trading condition.
- b. Dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
- c. Collusive bidding.
- d. If a bidder(s) or contractor(s), in the judgment of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

16. BENEFICIAL OWNERSHIP

The bidder/s are required to provide the information below for transparency.

- a. A beneficial owner of a company is an individual who, directly or indirectly, ultimately owns that company or exercises effective control over that company.
- b. Companies are required to keep a register of their beneficial owners and to provide this information to the Companies and Intellectual Property Commission (CIPC). The CIPC maintains a central register of beneficial ownership information.
- c. The beneficial ownership regime in South Africa is intended to improve transparency and accountability in the corporate sector. It is also intended to help prevent money laundering and terrorist financing.
- d. Companies are required to keep a register of their beneficial owners and must disclose in their bids the following information, as provided for in their register for the information of each beneficial owner:
 - Name
 - Date of birth
 - Identity number or passport number
 - Residential address
 - Occupation
 - Nature and extent of control over the company

17. SUBMISSION DETAILS

To respond to this tender, bidders are required to register on the GTAC e-procurement system, using the following link: <https://vendorportal.gtac.gov.za/>

The registration process involves the following steps:

- a) Register as a portal user. This is the process of creating a user account on the vendor portal/e-procurement system. This will allow the user to view and respond to tenders.
- b) Capture the supplier details. Registering the company details allows the bidder to enter information and upload documents.

To respond to this tender:

- c) Log in to the portal <https://vendorportal.gtac.gov.za/>
- d) Navigate to the tender menu.

- e) Select “Formal” and click on “Current”.
- f) A list of available tenders/RFQ will be available, and the bidder to select the tender number (e.g. TENxxxxx) to start the submission process.

Detailed instructions on how to register on the e-procurement system are available at

(<https://docs.corelab.co.za/Home/ViewContent?productid=1§ionid=2&contentid=1165>)

The capturing process is in the form of a wizard, with the system guiding you through each step. Once all the required information is completed, remember to submit your bid. Only submitted bids will be eligible for the award.

NB: Only electronic submission of bids on the GTAC e-procurement system is allowed. Do not submit hard copy bids to GTAC, as these will not be considered.

NB: Submissions received after the closing date and time will not be accepted.

For any enquiries, email: psp@gtac.gov.za or contact the vendor support desk at: <https://vendorportal.gtac.gov.za/Contact>.

CONTACT DETAILS

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