



Tender Number: RFP274/2021

**ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE
IMPLEMENTATION OF THE DISTRICT DEVELOPMENT MODEL (DDM)
FOR A PERIOD OF THREE YEARS**

CALL FOR EXPRESSION OF INTEREST (EOI)

NOVEMBER 2021

Issued by:

Development Bank of Southern Africa

1258 Lever Road, Headway Hill
Midrand, Johannesburg
Gauteng Province

Contact Person(s):

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Tel: (011) 313-3273

NAME OF TENDERER:

Tender Number: RFP274/2021

ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE IMPLEMENTATION OF THE DISTRICT DEVELOPMENT MODEL (DDM)

GENERAL INFORMATION

ID	ITEM / MILESTONE	DESCRIPTION / DUE DATE/ DUE TIME
1	EXPRESSION OF INTEREST (EOI) ISSUE DATE	5 November 2021
2	CLOSING DATE OF EOI	26 November 2021
3	CLOSING TIME OF EOI	23:55hrs Telkom Time
4	BID SUBMISSIONS ELECTRONICALLY	<ol style="list-style-type: none"> 1. Bidders are advised to kindly issue Tender Submission Link requests and all other enquiries to fikileSCM@dbsa.org – ONLY 2. No – Tender Submission Link requests will be accepted after 16h00 on the 22 November 2021. Any requests after the stipulated date and time will be disregarded. 3. Bidders will thereafter receive a OneDrive Link to upload their tender submission documents electronically. 4. Bidders who have received submission Links that have errors, will be provided with new Links for use.
5	EOI SUBMISSION	The EOI Document is to be completed in all respects, plus any additional supporting documentation required, must be submitted via <u>One Drive link</u> .
6	NOTIFICATION TO SUCCESSFUL AND UNSUCCESSFUL TENDERERS	Only successful tenderers will be notified in writing by the DBSA. The list of successful tenderers will be uploaded to the DBSA website. Tenderers whose names do not appear on this list are to conclude that their tenders have not been successful. Due to the expected volumes of tender responses, the DBSA will not send individual notices to unsuccessful tenderers.

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IMPLEMENTATION OF THE DISTRICT DEVELOPMENT MODEL (DDM)**

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E4	Indicative Site Information
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E1.1 NOTICE AND INVITATION TO SUBMIT AN EXPRESSION OF INTEREST

The Development Bank of Southern Africa invites expressions of interest for the **ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE IMPLEMENTATION OF THE DISTRICT DEVELOPMENT MODEL (DDM) FOR A PERIOD OF THREE YEARS.**

Only respondents who have suitably qualified professional teams, including professionally registered persons as required for the required specialist services, are eligible submit Expressions of Interest.

The tender documentation is available for downloading as from 5 November 2021 from 16:00pm on www.dbsa.org.

Tenderers may address all queries related to the issue of the tender documents to fikileSCM@dbsa.org and scmqueries@dbsa.org. Please quote RFP274/2021 in all correspondence, queries without a reference number will not be attended to.

There will be no compulsory briefing session for this Tender.

The closing date and time of submissions is 26 November 2021 at 00:00hrs Telkom Time, in accordance with Telkom time available through 1026. Bidders should ensure that Bids are submitted timeously and to the correct One Drive link provided by the SCM Official. The One Drive link provided will be valid till 23H55 on the closing date.

If the Bid is late, it will not be accepted under any circumstances whatsoever.

Requirements for submissions, opening and assessment are stated in the Submission Data.

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E1.2 SUBMISSION DATA

A Service Level Agreement will be entered into with the respective appointed Service Providers. The Standard Conditions for the calling for Expressions of Interest make several references to the Submission Data for details that apply specifically to this submission. The Submission Data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the Standard Conditions for the calling for Expressions of Interest.

Each item of data given below is cross-referenced to the clause in the Standard Conditions for the calling for Expressions of Interest.

The following variations, amendments and additions to the Standard Conditions for the Calling of Expressions of Interest (EOI) as set out in the Submission Data below shall apply to this EOI:

Clause number	Submission Data
H.1	The Employer is the Development Bank of Southern Africa as the Implementing Agent of the District Development Model
H.1.2	<p>The documents associated with the calling for expressions of interest issued by the employer comprise:</p> <p>Part E.1: Submission procedures</p> <p>E.1.1 Notice and invitation to submit an expression of interest</p> <p>E.1.2 Submission data</p> <p>Part E.2: Returnable documents</p> <p>E.2.1 List of returnable documents</p> <p>E.2.2 Submission schedules</p> <p>Part E.3 Indicative scope of work</p> <p>E.3 Indicative scope of work</p> <p>Part E.4 Indicative Site Information</p> <p>E.4 Indicative Site Information</p>

H.2.1	<p>Only those Tenderers who are an incorporated company and/or an incorporated/unincorporated joint ventures, consortia, or associations, and who satisfy the following eligibility criteria are eligible to submit expressions of interest:</p> <ul style="list-style-type: none"> Have in their employ professionally registered persons who are capable of providing the following category and sub-category of services or have obtained a firm undertaking from professional service providers who have in their employ registered professionals that are capable of providing such services: <ol style="list-style-type: none"> ECONOMIC DEVELOPMENT AND DEVELOPMENT PLANNING: One Plan development and review, Agricultural development and agro- processing, Tourism development, Local economic development, Waste economy, Ocean's economy, Corporate Investment beneficiation by locals (Mining, agriculture, fisheries, tourism etc.), Rural and township economies, Export market potential and value chains, and Enterprise development. INSTITUTIONAL DEVELOPMENT: Local governance and management, Localisation of the Sustainable Development Goals (SDGs), Municipal financial management, Municipal capability assessments, Municipal capacity building and support, Municipal Shared Services, Traditional Leadership and Communities, Organisational development, policy development, and Strategy facilitation and development. PROGRAMME AND PROJECT MANAGEMENT: Knowledge and information management, stakeholder management and communications, change management, and general programme/project management support.
H.2.1	<ol style="list-style-type: none"> The Tenderer or a member of the Tenderer's team is not part of the appointed professional teams currently providing services to the DBSA as Procurement Agents. The Tenderer (including all entities in a Joint Venture, Consortium or Association) shall be required to have existing and valid professional indemnity insurance should the Tenderer be appointed onto the Panel, the professional indemnity insurance cover required will be determined by the value of instructions to be issued. The Tenderer (including all parties in a Joint Venture, Consortium, or Association) which are not on the lists of tender defaulters published by National Treasury. <u>B-BBEE</u> <p>The DBSA fully endorses and supports B-BBEE, and it is strongly of the opinion that all South African business enterprises have an equal obligation to redress the imbalances of the past. The DBSA would therefore prefer to do business with local business enterprises who share these same values and who are prepared to contribute meaningful to support the transformation agenda of the country and the DBSA (including, but not limited to subcontracting and joint ventures).</p> <p>In terms of the DBSA Transformation Imperative Targets, the DBSA will consider companies that are EME's and QSE's with a minimum B-BBEE status of Level 2 who will contribute to meaningful B-BBEE initiatives as part of the tender process.</p> <p>The successful Tenderer, if not itself an EME or QSE with a minimum B-BBEE status level 2, as per Section 4(1)(a) and (b) of the PPR 2017, must subcontract a minimum of 30% of the value of the contract to the following category referred to in Section 4(1)(c) of the PPR 2017:</p> <ol style="list-style-type: none"> an EME or QSE which is at least 51% owned by black people.

H.2.2	There will be no compulsory briefing session for this Tender.											
H.2.3	<div>1. Bidders are advised to kindly issue Tender Submission Link requests and all other enquiries to fikileSCM@dbsa.org – ONLY</div> <div>2. No – Tender Submission Link requests will be accepted after 16h00 on the 22 November 2021. Any requests after the stipulated date and time will be disregarded.</div> <div>3. Bidders will thereafter receive a OneDrive Link to upload their tender submission documents electronically.</div> <div>4. Bidders who have received submission Links that have errors, will be provided with new Links for use.</div>											
H.2.4	The closing time for submissions is as stated in the Notice and Invitation to Submit an Expression of Interest and is repeated here for emphasis as 23:55hrs on Friday, 26 November 2021											
H.2.5	Telephonic, telegraphic, telex, facsimile or e-mailed submissions offers will not be accepted.											
H3.1	<div>1) All Tenderers who submit responsive submissions and who:</div> <div>a) have complied with the stipulations of H.2.1 above</div> <div>b) have completed the Compulsory Enterprise Questionnaire (to be completed by all members of a joint venture/consortium/association) and who are considered by the Employer not to have any conflicts of interest which may impact on their ability to perform the proposed contract in the best interests of the Employer or potentially compromise the tender process and are free of persons in the state who are not permitted to submit tenders or to participate in the contract; and</div> <div>c) have submitted responses for each category of service separately and labelled appropriately. Any submissions for combined category of service will be disqualified.</div> <div>• Tenderers who clearly indicate appropriately the area of specialization in their submission for specialized support, will have their submissions evaluated and scored.</div>											
	<div>2) The evaluation criteria that are to be scored and the maximum score assigned to each of such criteria are as follows:</div> <table><tr><th>EVALUATION CRITERIA THAT ARE SCORED</th><th>WEIGHT IN POINTS</th><th>WEIGHT</th></tr><tr><td colspan="3">PROFILE OF BIDDER & EXPERIENCE RELEVANT TO SCOPE OF WORK (100)</td></tr><tr><td><div>1. <u>Company Profile and Experience</u></div><div>Bids for each specialty area must be marked as such and submitted separately i.e., one bid for economic development and development planning, and another for institutional development and another for programme and programme management.</div><div>Bidder should have undertaken preferably 5 similar projects or related work within the public and local government space in the past ten years.</div></td><td><div>Maximum of 15 Points will be allocated per area of specialty– within the 15- point allocated per subcategory area of expertise within each specialist area – bidders should provide details of at least</div></td><td><div>50</div></td></tr></table>			EVALUATION CRITERIA THAT ARE SCORED	WEIGHT IN POINTS	WEIGHT	PROFILE OF BIDDER & EXPERIENCE RELEVANT TO SCOPE OF WORK (100)			<div>1. <u>Company Profile and Experience</u></div> <div>Bids for each specialty area must be marked as such and submitted separately i.e., one bid for economic development and development planning, and another for institutional development and another for programme and programme management.</div> <div>Bidder should have undertaken preferably 5 similar projects or related work within the public and local government space in the past ten years.</div>	<div>Maximum of 15 Points will be allocated per area of specialty– within the 15- point allocated per subcategory area of expertise within each specialist area – bidders should provide details of at least</div>	<div>50</div>
EVALUATION CRITERIA THAT ARE SCORED	WEIGHT IN POINTS	WEIGHT										
PROFILE OF BIDDER & EXPERIENCE RELEVANT TO SCOPE OF WORK (100)												
<div>1. <u>Company Profile and Experience</u></div> <div>Bids for each specialty area must be marked as such and submitted separately i.e., one bid for economic development and development planning, and another for institutional development and another for programme and programme management.</div> <div>Bidder should have undertaken preferably 5 similar projects or related work within the public and local government space in the past ten years.</div>	<div>Maximum of 15 Points will be allocated per area of specialty– within the 15- point allocated per subcategory area of expertise within each specialist area – bidders should provide details of at least</div>	<div>50</div>										

	<p>Bidder's must provide details relating to experience in executing projects with specific reference to actual clients in at least one and not more than three of following specialist service areas –</p> <ul style="list-style-type: none"> • Economic development And Development Planning: One Plan development and review, Agricultural development and agro- processing, Tourism development, Local economic development, Waste economy, Ocean's economy, Corporate Investment beneficiation by locals (Mining, agriculture, fisheries, tourism etc.), Rural and township economies, Export market potential and value chains, and Enterprise development. • Institutional development: Local governance and management, Localisation of the Sustainable Development Goals (SDGs), Municipal financial management, Municipal capability assessments, Municipal capacity building and support, Municipal Shared Services, Traditional Leadership and Communities, Organisational development, policy development, and Strategy facilitation and development. • Programme and project management: Knowledge and information management, stakeholder management and communications, change management, and general programme/project management support. 	<p>five similar projects executed for each of the specialist service area which are applicable to the tenderer.</p> <p>50 points = 5 or more projects undertaken 40 points = 4 projects undertaken 30 points = 3 projects undertaken 20 points = 2 projects undertaken 10 points = 1 project undertaken</p>	
	<p>2. Client References</p> <p>Demonstrated track record of bidder in specialist areas supported by original client references.</p> <p>Reference Letters – Provide at least five (5) references from previous and/or current clients on their official letterhead and signed by a senior client representative where a similar assignment(s) were completed successfully. The reference letter must at include the following: Scope of Work Done, Value of the Project, Impact of Work Executed, Statement of Client Satisfaction with Work Done and Contact Details of Client Representative.</p>	<p>For each reference letter a maximum score of 10 can be achieved. (Total of 5 x 10)</p> <p>From the contents of the reference letters, the evaluation committee will consider the scope of work done, value of project, impact of work done and statement of client satisfaction.</p> <p>Scoring for each reference letter will be:</p> <p>Excellent = 10 points Good = 7 points Average = 5 points Poor = 2 points</p>	<p>50</p>
	<p>Maximum possible score</p>		<p>100</p>

	<p>3) The scoring linked to prompts for judgment assigned to each of the evaluation criteria are as stated in the Returnable Documents (see Schedules and Briefings).</p> <p>4) The evaluation criteria shall be scored by not less than three evaluators in accordance with the prompts for judgment contained in the Returnable Documents (see Schedules and Briefings).</p>
	<p>5) Additional Conditions for the Calling for Expressions of Interest</p> <p>The Tenderer shall submit only via One Drive.</p> <p>The Tenderer is allowed to submit separate EOI proposals for one or more of the service categories of Section H2.1 above.</p>

Part E2 : Returnables Documents

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E2.1 List of Returnable Documents

Tenderers shall provide or complete the following documents:

- 1) Cover Page(s) to Returnable Documents *per* relevant Category of Service.
- 2) Record of Addenda to tender documents – **(Schedule A)**.
- 3) Compulsory Enterprise Questionnaire with company registration documentation – **(Schedule 1)**.
- 4) Tenderer's valid Tax Compliance PIN issued by the South African Revenue Services-**(Schedule 2)**.
- 5) Proof of professional indemnity cover. It is not relevant for purposes of evaluation of this bid but may be included should bidder prefer. – **(Schedule 3)**.
- 6) Copy of Joint Venture, Association or Consortium Agreement with company profiles – **(Schedule 4)**.
- 7) Tenderer's Central Supplier Database Summary Report – **(Schedule 5)**.
- 8) Tenderer's experience in the provision of the required professional services: A description of completed projects (also indicating the subcategories under which belongs) for **economic development and development planning**, and another for **institutional development** and another for **programme and programme management (Schedule 6)**.
- 9) Profiles, Details, and Experience of the Company or joint venture (incorporated or unincorporated) for key services /disciplines – **(Schedule 7)**.
- 10) Client Reference – Demonstrated track record of bidder in specialist areas supported by client references - **(Schedule 8)**.
- 11) Declaration of tenderer's past Supply Chain Management practices – **(Schedule 9)**.



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E2.2.0 COVER PAGE TO RETURNABLE SCHEDULES (1)

ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE IMPLEMENTATION OF THE DISTRICT DEVELOPMENT MODEL (DDM) FOR A PERIOD OF THREE YEARS

EXPRESSION OF INTEREST PROPOSAL

NAME OF TENDERER	
SIGNATURE OF TENDERER (Duly Authorized)	
CLOSING DATE AND TIME OF SUBMISSION	26 November 2021 23:55hrs TELKOM Time
SUBMISSION VIA	One Drive Link only
CATEGORY OF SERVICE (1)	ECONOMIC DEVELOPMENT AND DEVELOPMENT PLANNING: One Plan development and review, Agricultural development and agro-processing, Tourism development, Local economic development, Waste economy, Ocean's economy, Corporate Investment beneficiation by locals (Mining, agriculture, fisheries, tourism etc.), Rural and township economies, Export market potential and value chains, and Enterprise development.

NOTE: USE THIS COVER PAGE FOR THE PROPOSAL ON ECONOMIC DEVELOPMENT AND DEVELOPMENT PLANNING SERVICES ONLY



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E2.2.0 COVER PAGE TO RETURNABLE SCHEDULES (2)

ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE IMPLEMENTATION OF THE DISTRICT DEVELOPMENT MODEL (DDM)

EXPRESSION OF INTEREST PROPOSAL

NAME OF TENDERER	
SIGNATURE OF TENDERER (Duly Authorized)	
CLOSING DATE AND TIME OF SUBMISSION	26 November 2021 23:55hrs TELKOM Time
SUBMISSION VIA	One Drive Link only
CATEGORY OF SERVICE (2)	INSTITUTIONAL DEVELOPMENT: Local governance and management, Localisation of the Sustainable Development Goals (SDGs), Municipal financial management, Municipal capability assessments, Municipal capacity building and support, Municipal Shared Services, Traditional Leadership and Communities, Organisational development, policy development, and Strategy facilitation and development.

NOTE: USE THIS COVER PAGE FOR THE PROPOSAL ON INSTITUTIONAL DEVELOPMENT SERVICES ONLY



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E2.2.0 COVER PAGE TO RETURNABLE SCHEDULES (3)

**ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE
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EXPRESSION OF INTEREST PROPOSAL

NAME OF TENDERER	
SIGNATURE OF TENDERER (Duly Authorized)	
CLOSING DATE AND TIME OF SUBMISSION	26 November 2021 23:55hrs TELKOM Time
SUBMISSION VIA	One Drive Link only
CATEGORY OF SERVICE (3)	PROGRAMME AND PROJECT MANAGEMENT: Knowledge and information management, stakeholder management and communications, change management, and general programme/project management support.

**NOTE: USE THIS COVER PAGE FOR THE PROPOSAL ON PROGRAMME AND PROJECT
MANAGEMENT SERVICES ONLY**



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SCHEDULE (A): RECORD OF ADDENDA TO TENDER DOCUMENTS

I/We confirm that the following communication received from the Employer before the submission of this tender, amending the tender documents, have been taken into account in this tender submission and are attached herewith

ID	DATE	TITLE OR DETAILS
1.		
2.		
3.		
4.		
5.		
6.		
7.		

All Addenda are to be attached to this Schedule. Attach additional pages of this table if more space is required.

SIGNED ON BEHALF OF TENDERER: **Date:**

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**ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE
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SCHEDULE 1: COMPULSORY ENTERPRISE QUESTIONNAIRE

The following particulars must be furnished. In the case of a joint venture, consortium or association, **separate** enterprise questionnaires in respect of each partner must be completed and submitted.

Section 1: Name of enterprise:
Physical address of enterprise:
(LOCAL OFFICE)
.....

Section 2: VAT registration number, if any:

Section 3: CIDB registration number, if any: Not Applicable for this Tender .

Section 4: Particulars of sole proprietors and partners in partnerships

Name*	Identity number*	Personal income tax number*

* Complete only if sole proprietor or partnership and attach separate page if more than 3 partners

Section 5: Particulars of companies and close corporations

Company registration number

Close corporation number

Tax reference number

Date tenderer commenced provision of services in built-environment.....

Section 6: Record of service of the state

Indicate by marking the relevant boxes with a cross, if any sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months in the service of any of the following:

- | | |
|---|---|
| <input type="checkbox"/> a member of any municipal council | <input type="checkbox"/> an employee of any provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act 1 of 1999) |
| <input type="checkbox"/> a member of any provincial legislature | <input type="checkbox"/> a member of an accounting authority of any national or provincial public entity |
| <input type="checkbox"/> a member of the National Assembly or the National Council of Provinces | <input type="checkbox"/> an employee of Parliament or a provincial legislature |
| <input type="checkbox"/> a member of the board of directors of any municipal entity | |
| <input type="checkbox"/> an official of any municipality or municipal entity | |

If any of the above boxes are marked, disclose the following:

Name of sole proprietor, partner, director, manager, principal shareholder or stakeholder	Name of institution, public office, board or organ of state and position held	Status of service (tick appropriate column)	
		current	Within last 12 months

*insert separate page if necessary

Section 7: Record of spouses, children and parents in the service of the state

Indicate by marking the relevant boxes with a cross, if any spouse, child or parent of a sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months been in the service of any of the following:

- | | |
|--|---|
| <input type="checkbox"/> a member of any municipal council | <input type="checkbox"/> an employee of any provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act 1 of 1999) |
| <input type="checkbox"/> a member of any provincial legislature | <input type="checkbox"/> a member of an accounting authority of any national or provincial public entity |
| <input type="checkbox"/> a member of the National Assembly or the National Council of Province | <input type="checkbox"/> an employee of Parliament or a provincial legislature |
| <input type="checkbox"/> a member of the board of directors of any municipal entity | |
| <input type="checkbox"/> an official of any municipality or municipal entity | |

Name of spouse, child or parent	Name of institution, public office, board or organ of state and position held	Status of service (tick appropriate column)	
		Current	Within last 12 months

*insert separate page if necessary

The undersigned, who warrants that he/she is duly authorized to do so on behalf of the enterprise:

- i. authorizes the Employer to obtain a tax clearance certificate from the South African Revenue Services that my / our tax matters are in order.
- ii. confirms that the neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004.
- iii. confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption.
- iv. confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or with the Employer and his Agents that could cause or be interpreted as a conflict of interest; and
- v. confirms that the contents of this questionnaire are within my personal knowledge and are to the best of my belief both true and correct.

SCHEDULE 1: COMPULSORY ENTERPRISE QUESTIONNAIRE (Contd.)**Section 8: Details of Tenderer's Other Operational Offices (Apart from that given in Section 1 above)**

PROVINCE	PHYSICAL ADDRESS OF OFFICE	CONTACT TELEPHONE NUMBERS	NAME OF TENDERER'S OFFICE MANAGER

NOTE: Please attach company registration /incorporation documents to this Schedule

SIGNED ON BEHALF OF TENDERER: **Date:**.....



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SCHEDULE 2: TENDERER'S VALID TAX COMPLIANCE PIN

IT IS A CONDITION OF THIS TENDER THAT THE TAXES OF THE TENDERER MUST BE IN ORDER, OR THAT SATISFACTORY ARRANGEMENTS HAVE BEEN MADE WITH THE SOUTH AFRICAN REVENUE SERVICES (SARS) TO MEET THE RESPONDENT'S TAX OBLIGATIONS.

BIDDERS TAX STATUS MUST REMAIN COMPLIANT IN RESPECT TO THE EVALUATION PROCESS THROUGHOUT THE TENDER PROCESS, IN ORDER FOR A BIDDER TO BE EVALUATED.

1. The active Tax Compliance PIN issued by the South African Revenue Services must be submitted together with this tender and appended to this page. Failure to submit the active Tax Compliance PIN will result in the **invalidation/ disqualification** of the tender submission.
2. Valid Tax Compliance is a mandatory requirement for successful bidders post the tender process.
3. Where Joint Ventures/ Consortia/ Associations, etc. are involved, the Tax Compliance PIN of the main Joint Venture Partner as well as that of all the Joint Venture Partners must be appended to this page.

SIGNED ON BEHALF OF TENDERER: **Date:**

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SCHEDULE 3: PROOF OF PROFESSIONAL INDEMNITY INSURANCE

The Tenderer is referred to clause H.2.1 (d). of the Submission Data and shall state below details of the professional indemnity insurance held by the Tenderer (as detailed above, this schedule is not mandatory). Where the Tenderer is a joint venture, consortium or association, all the parties providing professional services must submit details of their existing respective professional indemnity insurances.

DETAILS OF EXISTING PROFESSIONAL INDEMNITY INSURANCE			
CATEGORY OF SERVICES TO BE PROVIDED	NAME OF INSURED ENTITY	NAME OF INSURER	LIMIT OF EXISTING PROF. INDEMNITY IN RESPECT OF EACH CLAIM WITHOUT LIMIT TO THE NUMBER OF CLAIMS (R million)
ECONOMIC DEVELOPMENT AND DEVELOPMENT PLANNING			
INSTITUTIONAL DEVELOPMENT			
PROGRAMME AND PROJECT MANAGEMENT			

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the Tenderer, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

SIGNED ON BEHALF OF TENDERER: **Date:**



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SCHEDULE 4: JOINT VENTURE, ASSOCIATION, OR CONSORTIUM AGREEMENT

After signing the Certificate of Authority below, Tenderers are to append a copy of the Joint Venture Agreement (if applicable), Consortium, or Association Agreements to this schedule together with the concise company profiles of each of the constituent members of the Joint Venture, Consortium or Association. Where applicable, other agreements such as a sub-consultancy agreement between the parties are to be attached.

Certificate of Authority:

We, the undersigned, are submitting this tender offer in joint venture, consortium or association under a formal legal arrangement and hereby authorize Mr./Ms....., authorized signatory of the company, joint venture, consortium, association, close corporation or partnership, acting in the capacity of Lead Tenderer, to sign all documents in connection with the tender offer and any contract resulting from it on our behalf.

NAME OF FIRM	ADDRESS	DULY AUTHORISED SIGNATORY
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....

NAME OF FIRM	ADDRESS	DULY AUTHORISED SIGNATORY
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....

Note: Use more rows /Tables if necessary

2. Signature of Lead Tenderer (Authorized Representative):

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the Tenderer, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

Signed		Date	
Name		Position	
Tenderer's Name			



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**ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE
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SCHEDULE 5: TENDERER'S CENTRAL SUPPLIER DATABASE SUMMARY REPORT

Tenderers are to append the summary report of the Government's Central Supplier Database in respect of the Tenderer, or of the main JV Partner to this page.

Tax Compliant Status and CSD Registration Requirements

ALL PROSPECTIVE BIDDERS MUST HAVE A TAX COMPLIANT STATUS EITHER ON THE CENTRAL SUPPLIER DATABASE (CSD) OF THE NATIONAL TREASURY OF SARS E FILING PRIOR TO APPOINTMENT/AWARD OF THE BID.

REGISTRATION ON THE CSD SITE OF THE NATIONAL TREASURY IS A COMPULSORY REQUIREMENT FOR A BIDDER TO BE APPOINTED, TO CONDUCT BUSINESS WITH THE DBSA. THE ONUS IS ON THE SUCCESSFUL BIDDER TO REGISTER ON THE CSD SITE AND PROVIDE PROOF OF SUCH REGISTRATION PRIOR TO APPOINTMENT/AWARD OF THE BID.

CSD Registration Number:	
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SCHEDULE 6: EVALUATION SCHEDULE: EXPERIENCE OF THE TENDERER

The experience and track record of the Tenderer as a Company will be evaluated with regard to the Tenderer's successful provision and completion **over the last five years, of services in the specific category of service** for which the tenderer is responding to (e.g.

The specialist areas of intervention will include:

a) ECONOMIC DEVELOPMENT AND DEVELOPMENT PLANNING: One Plan development and review, Agricultural development and agro-processing, Tourism development, Local economic development, Waste economy, Ocean's economy, Corporate Investment beneficiation by locals (Mining, agriculture, fisheries, tourism etc.), Rural and township economies, Export market potential and value chains, and Enterprise development.

b) INSTITUTIONAL DEVELOPMENT: Local governance and management, Localisation of the Sustainable Development Goals (SDGs), Municipal financial management, Municipal capability assessments, Municipal capacity building and support, Municipal Shared Services, Traditional Leadership and Communities, Organisational development, policy development, and Strategy facilitation and development.

c) PROGRAMME AND PROJECT MANAGEMENT: Knowledge and information management, stakeholder management and communications, change management, and general programme/project management support. For a Consortium, JV, or Association, the experience of each entity must be submitted with a copy of the company profiles of each entity for evaluation.

In the evaluation of the experience of the Tenderer in each category of service, the following rules shall apply:

Maximum of 15 Points will be allocated per subcategory specialty– within the 15- point allocated per area of subcategory expertise within each specialist area – bidders should provide details of at least five similar projects executed for each of the specialist service area.

ID	SECTORS FOR WHICH TENDERER HAS PROVIDED AND COMPLETED SERVICES SUCCESSFULLY OVER THE PAST 5 YEARS	% WEIGHT OF SECTOR IN THE TOTAL POINTS FOR EVALUATION OF THE EXPERIENCE OF TENDERER
1	ECONOMIC DEVELOPMENT AND DEVELOPMENT PLANNING	100%
2	INSTITUTIONAL DEVELOPMENT	100%
3	PROGRAMME AND PROJECT MANAGEMENT	100%
4	TOTAL	100%

a) For **SPECIALIZED PROJECT SUPPORT SERVICES:** Each discipline (e.g. **ECONOMIC DEVELOPMENT AND DEVELOPMENT PLANNING, INSTITUTIONAL DEVELOPMENT AND PROGRAMME AND PROJECT MANAGEMENT** etc.) will have a cumulative weight of 100% of the

total points for evaluation of the experience of the Tenderer. Each category will be measured individually.

The information submitted shall be within the previous five (5) years and can include contracts that are not complete prior to closing date for submissions. The Lead Entity of the Tenderer's Consortium, JV, or Association must be clearly identified in the submission. Tenderers should very briefly describe the Tenderer's experience in this regard and attach this to this schedule. The description should be put in tabular form (* See next page) with the indicated headings:

The scoring of the Tenderer's experience for each category of service will be as follows:

RATING SCORE /POINTS	PROMPT(S) FOR JUDGEMENT: EXPERIENCE OF THE TENDERER
Maximum of 15 Points will be allocated per area of specialty– within the 15- point allocated subcategory specialist area of expertise – bidders should provide details of at least five similar projects executed for each of the specialist service area.	
Below Poor: Score = 10% of points for criterion	10 points = 1 project undertaken
Poor: (Score = 20% of points for criterion)	20 points = 2 projects undertaken
Satisfactory: (Score =30% of points for criterion)	30 points = 3 projects undertaken
Good: (Score =40% of points for criterion)	40 points = 4 projects undertaken
Very good: (Score =50% of points for criterion)	50 points = 5 or more projects undertaken

SCHEDULE 7: EXPERIENCE AND TRACK RECORD OF THE TENDERER

Employer	Employer's Contact Person	Employer's Contact Tel. No.	Description of Project in the Relevant Category of Service and Location	Project Value inclusive of VAT (Rand)	Project Duration	
					Start Date	Completion Date

*** Note 1: More table /rows to be used where necessary to accommodate all Professional Team Entities. All company profiles to be attached after this table**

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the Tenderer, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

Signed		Date	
Name		Position	
Tenderer's Name			

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**SCHEDULE 8: EVALUATION SCHEDULE: EXPERIENCE
OF THE TENDERER(S)**

2. Client References

Demonstrated track record of bidder in specialist areas supported by original client references.

Reference Letters – Provide at least five (5) references from previous and/or current clients on their official letterhead and signed by a senior client representative where a similar assignment(s) were completed successfully. The reference letter must at include the following: Scope of Work Done, Value of the Project, Impact of Work Executed, Statement of Client Satisfaction with Work Done and Contact Details of Client Representative.

For each reference letter a maximum score of 10 can be achieved. (Total of 5 x 10)

From the contents of the reference letters, the evaluation committee will consider the scope of work done, value of project, impact of work done and statement of client satisfaction.

Scoring for each reference letter will be:

Excellent = 10 points
Good = 7 points
Average = 5 points
Poor = 2 points

The tenderer is referred to clause H.2.1 of the Submission Data and shall annex hereto all the reference letters, in order for the tenderer to be eligible to submit a tender for this project. The reference letters should be dated have been issued within the last three months for projects executed in the last five years.

2. A reference letter should not be more than five pages.



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SCHEDULE 9: DECLARATION OF TENDERER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

The Tenderer (including each and every entity forming part of a JV, Consortium or Association for the purpose of this tender) is obliged to complete the following declaration and where necessary furnish the required particulars in relation to persons or firms that are, or have been:

- a) Prohibited from doing business with the public sector
- b) Listed on the Register of Tender Defaulters by the National Treasury
- c) Convicted by a court of law for fraud and corruption
- d) Removed from a contract between them and any organ of state on account of failure to perform on or comply with the contract.

Item	Question	Yes	No
1.1	Is the Tenderer or any of its directors listed on the National Treasury's database as a company or person prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
1.1.1	If so, furnish particulars:		
1.2	Is the Tenderer or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? (To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number 012 3265445).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
1.2.1	If so, furnish particulars:		
1.3	Was the Tenderer or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
1.3.1	If so, furnish particulars:		
1.4	Was any contract between the Tenderer and any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
1.4.1	If so, furnish particulars:		

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the Tenderer, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

Signed		Date	
Name		Position	
Tenderer's Name			

Part E3: Indicative Scope of Work

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E3.1 Indicative Scope of Work.....	30 - 32



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ESTABLISHMENT OF A PANEL OF SERVICE PROVIDERS TO SUPPORT THE IMPLEMENTATION OF THE DISTRICT DEVELOPMENT MODEL (DDM) FOR A PERIOD OF THREE YEARS

E3.1 Indicative Scope of Work

E3.1.1. EMPLOYER'S OBJECTIVES

E3.1.2. SERVICES REQUIRED FROM PROFESSIONAL SERVICES PROVIDERS [PSP]

E3.1.3 SUMMARIZED DESCRIPTION OF THE SERVICES

E3.1.4 IMPLEMENTATION TIME FRAMES, INSTITUTIONAL ARRANGEMENTS, ASSUMPTIONS AND RISKS

E3.1.5 LOCATION OF THE SERVICES

E3.1.1. EMPLOYER'S OBJECTIVES

The President of South Africa (SA) in the 2019 Presidency Budget Speech identified the "pattern of operating in silos" in a government as a challenge, due to a lack of coherence in planning and implementation, which has led to difficulties in the monitoring and oversight of government's programmes. The consequence of these challenges has been a sub-optimal delivery of services and diminished impact on the triple challenges of poverty, inequality and employment.

The President further called for the rolling out of "a new integrated district-based approach to addressing service delivery challenges [and] localise[d] procurement and job creation, that promotes and supports local businesses, and that involves communities."

The Cabinet approved District Development Model (DDM) is due for implementation in all South Africa's 44 municipal Districts and 8 Metropolitans. Across the 44 districts and 8 Metros in the country, all developmental initiatives will be viewed through a district-level lens. Development will be pursued through single, integrated plans per district – one district, one plan – that will outline the role of each sphere of government as well as the role of communities and civil society sectors in each district. Each district plan ensures that national priorities are attended to in the locality concerned.

This coordination will require – with effect from the 2020/21 Budget cycle – those national budgets and programmes are spatially referenced across the 44 districts and 8 Metros. Similarly, provincial government budgets and programmes will be spatially referenced to districts and metros in the respective provinces, while municipalities will express the needs and aspirations of communities in integrated development plans for the 44 districts and 8 Metros.

As a result, during March 2020 the Department of Cooperative Governance (DCOG) and the Development Bank of Southern Africa ("DBSA") concluded a Memorandum of Agreement ("MoA") intended to establish the requisite capacity for the management, coordination and facilitation of DDM programme implementation support. Based on this agreement, the DBSA as the appointed implementing

agent seeks to procure a panel of service providers to support the DCOG and DBSA in the institutionalisation of the DDM programme in the various specialist areas set out below.

In addition, and in line with its mandate, the Employer [the Development Bank of Southern Africa (DBSA)] DBSA provides financing, infrastructure planning, project preparation, project implementation (multi-disciplinary engineering and project management services) and specialized project support services (e.g., legal, environmental compliance, procurement, etc.) to its clients for the delivery of water, sanitation, energy, roads, storm water, and transportation infrastructure (amongst others).

The integrated financing and non-financing support to the Employer's clients in the form of lending, infrastructure planning, project preparation, and project implementation support services is aimed at achieving the following goals:

- i. Increase in funding catalysed for infrastructure development – e.g. increased absorption and expenditure of fiscal allocations
- ii. Enhanced service delivery and development results
- iii. Acceleration of the reduction of service delivery backlogs
- iv. Alleviation of poverty in the under-resourced communities.

The specific objectives of the DBSA in the procuring of professional services outlined in the EOI are to:

- a) Obtain the relevant resources that will be placed in a database which will be used, as and when needed, to implement the various specialist areas projects within the following categories:
 - i) Economic development And Development Planning: One Plan development and review, Agricultural development and agro- processing, Tourism development, Local economic development, Waste economy, Ocean's economy, Corporate Investment beneficiation by locals (Mining, agriculture, fisheries, tourism etc.), Rural and township economies, Export market potential and value chains, and Enterprise development.
 - ii) Institutional development: Local governance and management, Localisation of the Sustainable Development Goals (SDGs), Municipal financial management, Municipal capability assessments, Municipal capacity building and support, Municipal Shared Services, Traditional Leadership and Communities, Organisational development, policy development, and Strategy facilitation and development.
 - iii) Programme and project management: Knowledge and information management, stakeholder management and communications, change management, and general programme/project management support.
- b) Use the procured PSPs, as and when needed, to provide quality, timely, effective, efficient, and stakeholder-satisfying services to the Employer's clients in the areas of services mentioned above services.
- c) Provide the DBSA and its strategic partners with the additional capacity to accelerate the scale and pace of service delivery in the region's entities that are to be supported.

E3.1.4 IMPLEMENTATION TIME FRAMES AND RISKS

E3.1.4.1 Implementation Time Frames

The DBSA anticipates that the professional services database created in this procurement process will remain valid for a maximum period of 36 months from the date of approval of the database. The duration

of the DBSA's PSP database (panel) will expire after 36 months from its promulgation, unless otherwise extended by the DBSA.

E3.1.4.2 RISKS AND RISK MITIGATION

The PSP is responsible to identify relevant risks to the programmes and projects assigned and are expected to take steps to mitigate these risks in their proposal. These may include:

- a) Lack of sufficient preparatory work by the key stakeholders
- b) Insufficient stakeholder involvement and support
- c) Delays in obtaining information from relevant key stakeholders
- d) Lack of access to rural project sites

E3.1.4.3 LOCATION OF THE SERVICES

The Professional Services Provider is expected to provide the services primarily throughout South Africa, at the DBSA, and at the relevant municipalities and key stakeholders' offices and sites.

Part E4: Indicative Site Information

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E4.1 Indicative Site Information	34

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THREE YEARS**

E4.1 Indicative Site information

The site locations of the programmes and projects are spread across all Provinces. The specifics will be advised at a later stage to the successful PSPs.

