

TENDER DOCUMENT GOODS AND SERVICES		 CITY OF CAPE TOWN ISIXEKO SASEKAPA STAD KAAPSTAD
SUPPLY CHAIN MANAGEMENT		
SCM - 542	Approved by Branch Manager: February 2024	Version: 10

TENDER NO: 51C/2026/27

TENDER DESCRIPTION: THE PROVISION OF PEOPLE, MANAGEMENT, LEADERSHIP DEVELOPMENT, ORGANISATIONAL DESIGN AND INNOVATION PROFESSIONAL SERVICES.

CONTRACT PERIOD: THIRTY-SIX (36) MONTHS FROM THE COMMENCEMENT DATE OF THE CONTRACT

CLOSING DATE 09 October 2026

CLOSING TIME 10:00 am

TENDER BOX NUMBER 201

TENDER FEE [R200]

Non – refundable tender fee payable to the City of Cape Town (CCT) for a hard copy of the tender document. This fee is not applicable to website downloads of the tender document.

TENDERER	
NAME of Company/Close Corporation or Partnership / Joint Venture/ Consortium or Sole Proprietor /Individual (hereinafter the "Tenderer")	
TRADING AS (if different from above)	
Registration number of Tenderer	
Physical address and chosen domicilium citandi et executandi of Tenderer	

NATURE OF TENDER OFFER (please indicate below)	
Main Offer (see clause 2.2.11.1)	
Alternative Offer (see clause 2.2.11.1)	

TENDER SERIAL NO.:	
SIGNATURES OF CCT OFFICIALS AT TENDER OPENING	
1	
2	
3	

TABLE OF CONTENTS

THE TENDER.....	3
T.1 GENERAL TENDER INFORMATION	3
T.2 CONDITIONS OF TENDER	4
2.1 General.....	4
2.2 Tenderer's obligations	7
2.3 The CCT's undertakings.....	94
THE CONTRACT	101
C.1 DETAILS OF TENDERER/SUPPLIER	102
C.2 FORM OF OFFER AND ACCEPTANCE	103
C.2.1 OFFER (TO BE COMPLETED BY THE TENDERER AS PART OF TENDER SUBMISSION).....	103
C.2.2 ACCEPTANCE (TO BE COMPLETED BY THE CCT)	104
C.2.3 SCHEDULE OF DEVIATIONS (TO BE COMPLETED BY THE CCT UPON ACCEPTANCE)	105
C.2.4 CONFIRMATION OF RECEIPT (TO BE COMPLETED BY SUPPLIER UPON ACCEPTANCE).....	106
C.3 OCCUPATIONAL HEALTH AND SAFETY AGREEMENT	107
C.4 PRICE SCHEDULE	108
C.5 SPECIFICATION(S).....	120
C.6 SPECIAL CONDITIONS OF CONTRACT	141
C.7 GENERAL CONDITIONS OF CONTRACT	152
C.8 ANNEXURES	162
ANNEXURE A – PRO FORMA INSURANCE BROKER'S WARRANTY	162
ANNEXURE B – MONTHLY PROJECT LABOUR REPORT	163
ANNEXURE C – PRO FORMA PERFORMANCE SECURITY/ GUARANTEE	165
ANNEXURE D – PRO FORMA ADVANCE PAYMENT GUARANTEE	166
ANNEXURE F – TENDER RETURNABLE DOCUMENTS.....	167
<i>Schedule F.1: Contract Price Adjustment</i>	<i>168</i>
<i>Schedule F.2: Certificate of Authority for Partnerships/ Joint Ventures/ Consortiums</i>	<i>169</i>
<i>Schedule F.3: Declaration for Procurement above R10 million</i>	<i>170</i>
<i>Schedule F.4: Preference Points Claim Form In Terms Of the Preferential Procurement Regulations 2022</i>	<i>171</i>
<i>Schedule F.5: Declaration of Interest – State Employees (MBD 4 amended).....</i>	<i>180</i>
<i>Schedule F.6: Conflict of Interest Declaration</i>	<i>182</i>
<i>Schedule F.7: Declaration of Tenderer's Past Supply Chain Management Practices (MBD 8)</i>	<i>183</i>
<i>Schedule F.8: Authorisation for the Deduction of Outstanding Amounts Owed to the CCT</i>	<i>185</i>
<i>Schedule F.9: Certificate of Independent Tender Determination</i>	<i>186</i>
<i>Schedule F.10: Proposed Deviations And Qualifications By Tenderer</i>	<i>187</i>
<i>Schedule F.11: List of Other Documents Attached By Tenderer.....</i>	<i>188</i>
<i>Schedule F.12: Record of Addenda to Tender Documents</i>	<i>189</i>
<i>Schedule F.13: Information to Be Provided With the Tender</i>	<i>190</i>
<i>Schedule F.14: Appeal Application</i>	<i>197</i>

THE TENDER

T.1 GENERAL TENDER INFORMATION

TENDER ADVERTISED	:	28 August 2026
SITE VISIT/CLARIFICATION MEETING	:	Not compulsory, but strongly recommended
VENUE FOR SITE VISIT/CLARIFICATION MEETING	:	14 September 2026 at 10am via Microsoft Teams https://teams.microsoft.com/meet/368442956390641?p=iMy3Dw4O7cAoNr7T7 Meeting ID: 368 442 956 390 641 Passcode: As2eU6vY
TENDER BOX & ADDRESS	:	Tender Box as per front cover at the Tender & Quotation Boxes Office, 2nd Floor (Concourse Level), Civic Centre, 12 Hertzog Boulevard, Cape Town. The Tender Document (which includes the Form of Offer and Acceptance) completed and signed in all respects, plus any additional supporting documents required, must be submitted in a sealed envelope with the name and address of the tenderer, the endorsement "TENDER NO. 51C/2026/27: - TENDER DESCRIPTION: The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services, the tender box number. and the closing date indicated on the envelope. The sealed envelope must be inserted into the appropriate official tender box before closing time. If the tender offer is too large to fit into the abovementioned box or the box is full, please enquire at the public counter (Tender Distribution Office) for alternative instructions. It remains the tenderer's responsibility to ensure that the tender is placed in either the original box or as alternatively instructed.
CCT TENDER REPRESENTATIVE	:	Email: SCM.Tenders21@capetown.gov.za

TENDERERS MUST NOTE THAT WHEREVER THIS DOCUMENT REFERS TO ANY PARTICULAR TRADE MARK, NAME, PATENT, DESIGN, TYPE, SPECIFIC ORIGIN OR PRODUCER, SUCH REFERENCE SHALL BE DEEMED TO BE ACCOMPANIED BY THE WORDS "OR EQUIVALENT"

T.2 CONDITIONS OF TENDER

2.1 General

2.1.1 Actions

2.1.1.1 The City of Cape Town (hereafter referred to as the "CCT") and each tenderer submitting a tender offer (hereinafter referred to as the "tenderer" or the "supplier") shall comply with item T.2 of this Tender Document Goods and Services (hereinafter referred to as these "Conditions of Tender"). The tenderer and the CCT shall collectively hereinafter be referred to as the "Parties" and individually a "Party"). In their dealings with each other, the Parties shall discharge their duties and obligations as set out in these Conditions of Tender, timeously and with integrity, and behave equitably, honestly and transparently, and shall comply with all legal obligations imposed on the Parties herein and in accordance with all applicable laws.

The Parties agree that this Tender Document Goods and Services (hereinafter referred to as the "Tender" / "Tender Document"), its evaluation and acceptance and any resulting contract shall also be subject to the CCT's Supply Chain Management Policy ('SCM Policy') that was applicable on the date the bid was advertised and as amended from time to time. If the CCT adopts a new SCM Policy which contemplates that any clause therein would apply to the Contract emanating from this tender (hereinafter referred to as the "Contract"), such clause shall also be applicable to that Contract. Please refer to this document contained on the CCT's website.

Abuse of the supply chain management system is not permitted and may result, inter alia, (1) in the tender being rejected; (2) cancellation of the contract; (3) restriction of the supplier, and/or (4) the exercise by the CCT of any other remedies available to it as provided for in the SCM Policy and/or the the Contract and/or this tender and/or any applicable laws .

2.1.1.2 The CCT, the tenderer and their agents and employees involved in the tender process shall avoid conflicts of interest and where a conflict of interest is perceived or known, declare any such conflict of interest, indicating the nature of such conflict. Tenderers shall declare any potential conflict of interest in their tender submissions. Employees, agents and advisors of the CCT shall declare any conflict of interest to the CCT at the start of any deliberations relating to the procurement process or as soon as they become aware of such conflict and abstain from any decisions where such conflict exists or recuse themselves from the procurement process, as appropriate.

2.1.1.3 The CCT shall not seek, and a tenderer shall not submit a tender, without having a firm intention and capacity to proceed with the contract.

2.1.2 Interpretation

2.1.2.1 The additional requirements contained in Annexure F to the contract (hereinafter referred to as the "returnable documents" / "Returnable Schedules") are part of these Conditions of Tender and are specifically hereby incorporated into these Conditions of Tender.

2.1.2.2 These Conditions of Tender and returnable Documents which are required for CCT's tender evaluation purposes herein, shall form part of the Contract arising from the CCT's corresponding invitation to tender.

2.1.3 Communication during tender process

Verbal or any other form of communication, from the CCT, its employees, agents or advisors during site visits/clarification meetings or at any other time prior to the award of the Contract, will not be regarded as binding on the CCT, unless communicated by the CCT in writing to suppliers / tenderers by its Director: Supply Chain Management or his nominee. Similarly, any communication of the tenderer / supplier that is not reduced to writing by the tenderer / supplier, its employees, agents or advisors, shall not be regarded as binding on the CCT, unless communicated to the CCT in writing by the suppliers / tenderers, or their duly authorised representatives.

2.1.4 The CCT's right to accept or reject any tender offer

2.1.4.1 The CCT may accept or reject any tender offer and may cancel the corresponding tender process or reject all tender offers at any time before the formation of a contract. The CCT may, prior to the award of the tender, cancel a tender if:

- (a) due to changed circumstances, there is no longer a need for the services, works or goods requested; or
- (b) funds are no longer available to cover the total envisaged expenditure; or
- (c) no acceptable tenders are received;
- (d) there is a material irregularity in the tender process; or
- (e) the Parties are unable to negotiate market related pricing.

The CCT shall not accept or incur any liability to a tenderer for such cancellation or rejection but will give written reasons for such action upon receiving a written request to do so.

2.1.5 Procurement procedures

2.1.5.1 General

The CCT intends to appoint two tenderers per part (the highest ranked tenderer ("the winner") and in addition one ("alternative tenderer") for the allocation of work for Parts A to H of the tender. If insufficient responsive bids are received, the CCT reserves the right to appoint fewer tenderers, or not to appoint any tenderers at all.

Suppliers, once appointed and subject to operational requirements, will be invited to deliver the goods or services on a "winner-takes-all" basis, whereby the order will always be offered and, if accepted, allocated to the highest ranked tenderer ("the winner"), and only if they refuse will the work be offered to the ("alternative tenderer").

The contract period shall be for a period of **36** months from the commencement date of the contract.

2.1.5.2 Proposal procedure using the two stage-system

A two-stage system **will not** be followed.

2.1.5.3 Nomination of Standby Tenderer

"Standby Tenderer" means a tenderer per part, identified by the CCT at the time of awarding a bid that will be considered for award should the contract be terminated for any reason whatsoever. In the event that a contract is terminated during the execution thereof, the CCT may consider the award of the contract, or non-award, to the Standby Tenderer in terms of the procedures included its SCM Policy, as amended from time to time.

2.1.6 Objections, complaints, queries and disputes/ Appeals in terms of Section 62 of the Systems Act/ Access to court

2.1.6.1 Disputes, objections, complaints and queries

In terms of Regulations 49 and 50 of the Local Government: Municipal Finance Management Act, 56 of 2003 Municipal Supply Chain Management Regulations (Board Notice 868 of 2005):

- a) Persons aggrieved by decisions or actions taken by the CCT in the implementation of its supply chain management system, may lodge within 14 days of the decision or action, a written objection or complaint or query or dispute against the decision or action.

2.1.6.2 Appeals

- a) In terms of Section 62 of the Local Government: Municipal Systems Act, 32 of 2000 a person whose rights are affected by a decision taken by the CCT, may appeal against that decision by giving written notice of the appeal and reasons to the City Manager within 21 days of the date of the notification of the decision.

- b) An appeal must contain the following:
 - i. Must be in writing
 - ii. It must set out the reasons for the appeal
 - iii. It must state in which way the Appellant's rights were affected by the decision;
 - iv. It must state the remedy sought; and
 - v. It must be accompanied with a copy of the notification advising the person of the decision
- c) The relevant CCT appeal authority must consider the appeal and **may confirm, vary or revoke** the decision that has been appealed, but no such revocation of a decision may detract from any rights that may have accrued as a result of the decision.

2.1.6.3 Right to approach the courts and rights in terms of Promotion of Administrative Justice Act, 3 of 2000 and Promotion of Access to Information Act, 2 of 2000

The sub- clauses above do not influence any affected person's rights to approach the High Court at any time or its rights in terms of the Promotion of Administrative Justice Act (PAJA) and Promotion of Access to Information Act (PAIA).

- 2.1.6.4** All requests referring to sub clauses 2.1.6.1 and 2.1.6.2 must be submitted in writing to:
The City Manager - C/o the Manager: Legal Compliance Unit, Legal Services Department, Office of the City Manager
Via hand delivery at: 20th Floor, Tower Block, 12 Hertzog Boulevard, Cape Town 8001
Via post at: Private Bag X918, Cape Town, 8000
Via email at: MSA.Appeals@capetown.gov.za

- 2.1.6.5** All requests referring to clause 2.1.6.3 must be submitted in writing to:
The City Manager - C/o the Manager: Access to Information Unit, Legal Service Department, Office of the City Manager
Via hand delivery at: 20th Floor, Tower Block, 12 Hertzog Boulevard, Cape Town 8001
Via post at: Private Bag X918, Cape Town, 8000
Via email at: Access2info.Act@capetown.gov.za

2.1.6.6 The minimum standards regarding accessing and 'processing' of any personal information belonging to another in terms of Protection of Personal Information Act, 2013 (POPIA).

For purposes of this clause 2.1.6.6, the contract and these Conditions of Tender, the terms "data subject", "Personal Information" and "Processing" shall have the meaning as set out in section 1 of POPIA, and "Process" shall have the corresponding meaning.

The CCT, its employees, representatives and sub-contractors may, from time to time, process the tenderer's and/or its employees', representatives' and/or sub-contractors' Personal Information, for purposes of, and/or relating to, the tender, the contract and these Conditions of Tender, for research purposes, and/or as otherwise may be envisaged in the CCT's Privacy Notice and/or in relation to the CCT's Supply Chain Management Policy or as may be otherwise permitted by law. This includes the Processing of the latter Personal Information by the CCT's due diligence assurance provider, professional advisors and the Appeal Authority as applicable. The CCT's justification for the processing of such aforesaid Personal Information is based on section 11(1)(b) of POPIA, i.e., in terms of which the CCT's Processing of the said Personal Information is necessary to carry out actions for the conclusion and/or performance of the contract, to which the applicable data subject (envisaged in this clause 2.1.6.6 above) is a party.

All requests relating to data protection must be submitted in writing to:
The City Manager - C/o the Information Officer, Office of the City Manager
Via hand delivery at: 20th Floor, Tower Block, 12 Hertzog Boulevard, Cape Town 8001
Via post at: Private Bag X9181, Cape Town, 8000
Via email at: Popia@capetown.gov.za.

2.1.6.7 Compliance to the CCTs Appeals Policy.

In terms of the CCT's Appeals Policy, a fixed upfront administration fee will be charged. In addition, a surcharge may be imposed for vexatious and frivolous or otherwise manifestly inappropriate tender related appeals.

The current approved administration fee is R300.00 and may be paid at any of the Municipal Offices or at the Civic Centre in Cape Town using the GL Data Capture Receipt attached as Schedule F.14: Appeal Application Form. Alternatively, via EFT into the CCT's NEDBANK Account: CITY OF CAPE TOWN and using Reference number: 198158966. You are required to send proof of payment when lodging your appeal.

The current surcharge for vexatious and frivolous or otherwise manifestly inappropriate tender related appeals will be calculated as ½ (Administrative cost of the tender appeal) + 0.25 % (Appellant's tender price).

Should the payment of the administration fee of R300.00 or the surcharge not be received, such fee or surcharge will be added as a Sundry Tariff to the tenderer's municipal account.

In the event where the tenderer does not have a Municipal account with the CCT, the fee or surcharge may be recovered in terms of the CCT's Credit Control and Debt Collection By-law, 2006 (as amended) and its Credit Control and Debt Collection Policy.

2.1.7 CCT Supplier Database Registration

Tenderers are required to be registered on the CCT Supplier Database as a service provider. Tenderers must register as such upon being requested to do so in writing and within the period contained in such a request, failing which no orders can be raised or payments processed from the resulting contract. In the case of Joint Venture partnerships this requirement will apply individually to each party of the Joint Venture.

Tenderers who wish to register on the CCT's Supplier Database may collect registration forms from the Supplier Management Unit located within the Supplier Management / Registration Office, 2nd Floor (Concourse Level), Civic Centre, 12 Hertzog Boulevard, Cape Town (Tel 021 400 9242/3/4/5). Registration forms and related information are also available on the CCT's website www.capetown.gov.za (follow the Supply Chain Management link to Supplier registration).

It is each tenderer's responsibility to keep all the information on the CCT Supplier Database updated.

2.1.8 National Treasury Web Based Central Supplier Database (CSD) Registration

Tenderers are required to be registered on the National Treasury Web Based Central Supplier Database (CSD) as a service provider. Tenderers must register as such upon being requested to do so in writing and within the period contained in such a request, failing which no orders can be raised or payments processed from the resulting contract. In the case of Joint Venture partnerships this requirement will apply individually to each party of the Joint Venture.

Tenderers who wish to register on the National Treasury Web Based Central Supplier Database (CSD) may do so via the web address <https://secure.csd.gov.za>.

It is each tenderer's responsibility to keep all the information on the National Treasury Web Based Central Supplier Database (CSD) updated.

2.2 Tenderer's obligations

2.2.1 Eligibility Criteria

2.2.1.1 Tenderers are obligated to submit a tender offer that complies in all aspects to the conditions as detailed in this tender document and the Conditions of Tender. An acceptable tender must "COMPLY IN ALL" aspects with the tender, Conditions of Tender, all Specifications (i.e., item C.5 below, hereinafter the "Specifications"), pricing instructions herein and the Contract including its conditions.

2.2.1.1.1 Submit a tender offer

Only those tender submissions from which it can be established, *inter alia* that a clear, irrevocable and unambiguous offer has been made to CCT, by whom the offer has been made and what the offer constitutes, will be declared responsive.

2.2.1.1.2 Compliance with requirements of CCT SCM Policy and procedures

Only those tenders that are compliant with the requirements below will be declared responsive:

- a) A completed **Details of Tenderer** to be provided (applicable schedule below to be completed);
- b) A completed **Certificate of Authority for Partnerships/ Joint Ventures/ Consortiums** to be provided authorising the tender to be made and the signatory to sign the tender on the partnership /joint venture/consortium's (applicable schedule below to be completed);
- c) A copy of the partnership / joint venture / consortium agreement to be provided, where applicable.

- d) A completed **Declaration of Interest – State Employees** to be provided and which does not indicate any non-compliance with the legal requirements relating to state employees (applicable schedule below to be completed);
- e) A completed **Declaration – Conflict of Interest and Declaration of Tenderers' past Supply Chain Management Practices** to be provided and which does not indicate any conflict or past practises that renders the tender non-responsive based on the conditions contained thereon (applicable schedules below to be completed);
- f) A completed **Certificate of Independent Bid Determination** to be provided and which does not indicate any non-compliance with the requirements of the schedule (applicable schedule below to be completed);
- g) The tenderer (including any of its representatives, directors or members), has not been restricted in terms of abuse of the Supply Chain Management Policy,
- h) The tenderer's tax matters with SARS are in order, or the tenderer is a foreign supplier that is not required to be registered for tax compliance with SARS;
- i) The tenderer is not an advisor or consultant contracted with the CCT whose prior or current obligations creates any conflict of interest or unfair advantage;
- j) The tenderer is not a person, advisor, corporate entity or a director of such corporate entity, who is directly or indirectly involved or associated with the bid specification committee;
- k) A completed **Authorisation for the Deduction of Outstanding Amounts Owed to the CCT** to be provided and which does not indicate any details that renders the tender non-responsive based on the conditions contained thereon (applicable schedules below to be completed);
- l) The tenderer (including any of its representatives, directors or members), has not been found guilty of contravening the Competition Act 89 of 1998, as amended from time to time;
- m) The tenderer (including any of its representatives, directors or members), has not been found guilty on any other basis listed in the Supply Chain Management Policy.

2.2.1.1.3 Mandatory Requirements

None

2.2.1.1.4 Compulsory clarification meeting

Not Applicable

2.2.1.1.5 Functionality Evaluation

In support of context to the evaluation criteria listed in the tables below, the following definitions are provided for understanding as per CCT application:

Business Improvement - Business improvement is the process of making deliberate, structured changes to how a business operates with the goal of improving performance.

Close Out Report/ Project Closure Report - is a formal document created at the end of a project to confirm that all work is completed, verified against goals, and officially handed over. It summarises project performance, documents lessons learned, closes contracts and releases resources, ensuring a structured transition from project to operations. (Source Google / Wits University)

Employee: An individual employed by the City of Cape Town on a permanent or non-permanent contractual capacity/basis excluding temporary employment or staffing provided in terms of labour brokers, community-based work, expanded public works programmes or student internships.

e-learning: (short for electronic learning) refers to education, training, or learning delivered through digital technologies, most commonly via the internet. It allows learners to access content, interact with instructors or peers, and complete assessments using computers, tablets, or mobile devices.

e-learning facilitation: The process of guiding, supporting, and enhancing learners' experience in an online learning environment. It involves more than simply delivering content—it focuses on creating engagement, fostering interaction, and helping learners achieve their learning outcomes in a digital space.

Facilitation methodology: A structured system of processes, steps, and techniques used by a facilitator to guide a group through a process of engagement, including collaborative work. It provides a clear framework for defining goals, managing group interactions, and reaching shared outcomes without the facilitator imposing their own answers. It may include ways of enabling people to establish meaning from content and / or improving

emotional and relational processing, the use of dialogue, and reflection and / or the use of challenges. It is based on the utilisation of group dynamics and lived experience to deliver practical desired outcomes.

Hybrid facilitation: The design and guidance of meetings, workshops, or learning sessions that engage participants who are both physically present in the same room and those who join remotely via digital platforms.

Hybrid learning: An approach to learning in which some learning happens in person (face-to-face) and some happens online. These two modes are intentionally integrated to create one cohesive learning experience.

In person facilitation: The process of guiding, supporting, and managing a group's discussion, activities, or learning in a physical, face-to-face setting. A facilitator helps the group work effectively together, stay focused on objectives, and ensure that all voices are heard.

In person learning: A learning format where teaching and learning happen face-to-face in a shared physical space—such as a classroom, lecture hall, training room, or workshop.

Learning methodology: Defined based on what content is learned, cognitive acquisition, the use of models, frameworks, theory and is often instructor-led.

Operational Workforce Planning: The alignment of the organisation's operational human resources needs with its operational plans and service delivery mandates. The alignment is accomplished by determining future short to medium term workforce needs, analysing the current workforce, identifying the gaps between the present workforce and future needs, and implementing solutions to close such gaps, so that the organisation can accomplish its mission, goals, and objectives.

Organisational Design: The process of shaping and aligning an organisation's structure, systems, roles, processes, and culture so that they support and enable the organisation's strategic goals. It determines how work is divided, coordinated, and managed to optimise performance, communication, and decision-making.

Organisational Development: A systematic and long-term approach to improving an organization's effectiveness, adaptability, and culture. It utilizes behavioural science—including psychology and sociology—to align strategy, structure, and processes with people. OD focuses on enhancing performance, fostering innovation, and managing change through interventions like leadership enablement and employee engagement.

Real-time data tracking: The continuous collection, processing, and reporting of data the moment it is generated, with little to no delay. It means monitoring information live, as events happen, rather than waiting for periodic updates or reports.

Strategic Workforce Planning: The strategic alignment of the organisation's people management requirements with its strategic direction and focuses on critical and core roles in the organisation. Strategic alignment is accomplished by determining future strategic workforce needs (medium to long term), analysing the current workforce, identifying the gaps between the present workforce and future needs, and implementing solutions to close such gaps, so that the organisation can successfully execute its strategy.

Succession Planning: A process that includes the identification, development and advancement of talent e.g. future leaders or replacement incumbents. This process is important to ensure continuity in high potential, mission critical and leadership roles within the organisation.

Sustainable leadership: The capacity to deliver results over time without degrading people, culture, or the system — including oneself. This will include key elements such as long-term decision thinking, emotional and energy regulation, ethical trade-off awareness, talent and system stewardship and self-sustainability (burnout prevention).

Virtual learning: An instructional environment where learners and educators interact, access content, and complete activities through online platforms, often using tools such as learning management systems (LMS), video conferencing, digital assessments, and interactive multimedia.

Virtual facilitation: The practice of guiding, coordinating, and managing group interactions, discussions, or learning experiences in an online environment, using digital tools such as video conferencing platforms, collaboration apps, and virtual whiteboards.

Source of definitions – CCT policy documents, online research

In support of context to the evaluation criteria listed in the tables below, the following definitions of resource items are provided for understanding as per CCT definition and application:

Account Manager: A professional employed by a company or consulting firm who supports the management of client relationships and scopes of work under the guidance of a Key Account Manager. The Account Manager assists with client communication, coordination of content development and delivery activities and administrative or operational tasks, contributing to service delivery and relationship management without holding primary accountability for clients or outcomes.

Administrative and logistic assistant: An individual responsible for assisting in carrying out functions / items (in this work tender) and the administration related to the specific scope required.

Agile Facilitator: An Agile (team) facilitator is a role that helps agile teams improve by helping them improve communication and collaboration. The facilitator will assist in resolving issues that influence productivity and increase the team's ability to function as a unit.

Analyst: A professional who examines information, data, processes, or situations to identify patterns, insights, and implications that support decision-making and problem-solving. The role focuses on turning data and evidence into clear, structured understanding.

Assessment report writer: An individual that captures an assessment report as a written record of the discussions and recommendations that happened during an assessment and as per the assessments specified in the specific scope required.

Business Analyst: An individual who conducts analysis of the business environment (Micro and macro) related to the specific scope required.

Change Analyst: An individual who conducts analysis in the change management discipline related to the specific scope required.

Change Manager: An individual responsible for the management of change through an application of a structured process and set of tools for leading the people side of change to achieve a desired outcome as per the specific scope required.

Communications Manager: An individual in charge of overseeing all internal and external communications, ensuring its messaging is consistent and engaging as related to the specific scope required.

Copy writer: An individual responsible for writing text for the purpose of ensuring that the written content is effectively transferred or copied to a predetermined format or template as related to the specific scope required.

Creative Writer: An individual that uses an expressive form of writing that demands the use of own creativity, imagination and story to portray a particular message, as it would relate to the specific scope required.

Content Developer: A professional who supports content development activities under the guidance of a senior lead, contributing to the drafting, adaptation, and refinement of learning materials. The role focuses on developing content components, researching information, and assisting in the production of materials in line with agreed objectives, without overall accountability for content design or programme architecture.

Data Analyst: An individual responsible for the process of cleaning, analysing, interpreting, and displaying data using different approaches and business intelligence tools.

Data Specialist: An individual who is tasked with overseeing the development of new databases, monitoring databases to extract relevant information and for its performance and interpretation of raw data and changing it into usable feedback and applications.

Design Thinking Facilitator: An individual responsible for supporting and enabling a structured process of customer-focused innovation that support productive group work. They work with a team to uncover new insights and generate ideas that might not otherwise have been revealed through routine engagement or work processes.

Engagement Manager: An individual that is responsible for overseeing day-to-day project delivery, managing client relationships, and guiding the team. They ensure that all services and activities align with the defined scope, driving successful outcomes and overall success for the client.

Facilitation services: A professional, neutral processes designed to make group collaboration, decision-making, and goal achievement easier and more effective. A facilitator guides discussions, manages conflict, and ensures participation, empowering groups to solve problems without the facilitator dictating outcomes.

Facilitator: A facilitator is a neutral person who guides a group, meeting, or process to help participants work together more effectively, reach goals, or solve problems without directly managing the content. They enable others to work, learn, or communicate efficiently by guiding, rather than directing, the process (Merriam Webster Dictionary). The facilitator may work under the direction of a lead facilitator as required.

Functional content specialist: An individual that possess specialist knowledge and expertise regarding content relevant to a specific discipline and as related to the specific scope required.

Functional Expert: A professional engaged to contribute functional or subject-specific expertise. The professional is responsible for providing expert input on allocated aspects of the work required including supporting analysis, the development and implementation of identified activities, as well as the delivery of agreed outputs or outcomes.

Functional Expert Facilitation Service: A professional facilitation service delivered by a facilitator with specialist expertise in a defined functional or disciplinary domain, who designs and guides neutral, structured group processes to support effective collaboration, learning, and decision-making. While remaining neutral to outcomes, the facilitator may contribute functional, disciplinary or cross-disciplinary domain-specific knowledge within scope to inform discussion and enable actionable results.

Graphic Artist: An individual who will create the artwork that will be used in a graphic project as related to the specific scope required.

Human Capital Advisory Consultant: An individual who provides professional Human Capital advice and guidance related to the specific scope required.

Industrial / Organisational Psychologist An individual registered with the Health Professions Council of South Africa (HPCSA) as a psychologist under the Health Professions Act, 1974, who is qualified to apply psychological principles to work, organisational, leadership, and human systems, including psychological assessment, organisational diagnostics, interventions, research, and professional opinion within their regulated scope.

Information Analyst: An individual who provides advice, analysis and interpretation of information for activities related to the specific scope required.

Information Specialist: An individual responsible for analyzing and managing information databases.

Innovation strategist: An individual that utilizes their analytical skills to evaluate an organization's operations, including internal structure, business processes, etc. to develop methods for improvements.

Intern Psychologist: An individual registered with the HPCSA in the intern category who has completed an accredited professional psychology qualification and is undertaking a structured, supervised internship in an approved setting as a statutory requirement for registration as an independent psychologist. Interns may not practise independently.

Key Account Executive: A service provider's designated senior point of accountability for the overall client relationship, commercial performance and service delivery outcomes across all projects and engagements. (Representative of the service provider on the contract).

Key Account Manager: A professional employed by a company or consulting firm who is responsible for managing and maintaining client relationships and delivering on agreed scopes of work. The Key Account Manager acts as the primary point of contact for assigned clients, oversees the delivery of services and content, manages client expectations and works to retain and grow ongoing business by ensuring that the organisation's services meet client needs and objectives.

Lead Content Developer: A professional responsible for leading content design and development within a defined scope, ensuring conceptual coherence, quality, and alignment to objectives. The role includes structuring learning content, integrating frameworks or methodologies, guiding junior contributors where applicable, and ensuring that developed materials are fit for purpose and ready for delivery.

Learning Designer (or Instructional Designer): A professional who designs learning experiences and content using adult learning principles and instructional methodologies. The role focuses on structuring learning journeys, selecting appropriate learning methods, and developing content that supports effective knowledge transfer, skills development, and behaviour change.

Lead Facilitator: A senior-level professional who designs and directs group processes such as workshops, strategy sessions, or meetings, to guide participants toward achieving specific, predetermined goals. They are responsible for setting the agenda, managing group dynamics, maintaining an inclusive environment, and ensuring that the discussion turns into actionable outcomes.

Lead Functional Expert: A senior-level professional engaged to lead and deliver work within one or more functional or disciplinary domains and is accountable for defining the technical or professional approach. This includes providing authoritative expert input and advice within the agreed scope of work, co-ordinating and directing contributing experts where applicable, as well as ensuring that all outputs, recommendations and deliverables meet the required objectives, standards and quality requirements.

Lead Researcher: An individual who uses highly specialised scientific measures in the research they conduct and who works on research projects that are either too large or too complex for junior researchers or junior research specialists.

Lean Management Facilitator: An individual who uses an approach to project-based work that supports continuous improvement, typically taking a long-term approach that systematically seeks to achieve incremental changes in processes to improve efficiency and quality.

Lean Six Sigma: A data-driven methodology that merges Lean principles with the structured DMAIC process (Define, Measure, Analyse, Improve, Control) to maximize customer value by eliminating waste and reducing process defects.

Lean Six Sigma Consultant: A business improvement and operational excellence professional who applies Lean and Six Sigma methodologies to analyse, redesign, and optimise business processes. The role focuses on identifying inefficiencies, eliminating waste, improving service delivery, and delivering measurable outcomes through the integration of people, processes, technology, and data. Responsibilities include process analysis and mapping, root cause analysis, identification of cost-saving and resource optimisation opportunities, development of future-state (TO-BE) solutions, and support for the implementation and monitoring of continuous improvement initiatives.

Operating Model: An operating model outlines how the company delivers value to its customers, operates on a day-to-day basis, and achieves its strategic objectives. The operating model is informed by the strategy and business model of the organisation and can generally be analysed through the lens of purpose, people, processes, technology, footprint, governance, regulations, and stakeholders.

Organisational Development Specialist: An individual who assists organisations improve their effectiveness, culture, and performance by focusing on people, processes, culture and systems. They focus on planned, evidence-based change that strengthens an organisations' effectiveness and health, through structured interventions and engagements.

Organisational Design consultant: A specialist who assists organisations align their structure, roles, processes, governance, and ways of working with their strategy and operating environment. Their purpose is to improve organisational effectiveness by ensuring that the way work is organised enables strategy execution.

Organisational complexity: Organisational complexity is the degree of differentiation, interdependence, and structural, operational, or environmental intricacy within an organisation. It refers to the volume of resources, specialized departments, hierarchical layers, and processes, such as multiple products or international operations, that make coordination difficult. Common examples include extensive management layers, complex supply chains, and large-scale, interdependent projects.

Psychometrist: An individual registered with the HPCSA as a psychometrist under the Health Professions Act, authorised to administer, score, interpret, and provide feedback on designated psychological assessments (e.g. aptitude, cognitive ability, personality) within a prescribed scope, and to refer cases requiring advanced assessment or diagnosis to a registered psychologist.

Report Writer: An individual who is a professional who collects, analyses and converts raw data and information into written reports.

Researcher: A professional who systematically investigates questions, problems, or phenomena to generate new knowledge, validate existing information, or inform decision-making. Researchers design and conduct studies, collect and analyse data, and interpret findings using appropriate methods and ethical standards.

Research Specialist: An individual who is a specialist in the use of a careful consideration of study regarding a particular concern or a problem using scientific methods and who conducts such research through an organized and systematic investigation into something as defined.

Senior Account Manager general content development: A more senior person who works for a company / consulting firm and is both responsible and accountable for the management of the relationship and scope of work (content development). They maintain and further develop the company / consulting firm's existing relationships with a client or group of clients, so that they will continue to utilise their services going forward.

Senior Business Analyst: An experienced professional who provides advanced analysis, insights, and recommendations to support strategic, operational, or policy decisions. The role combines deep subject-matter expertise with strong analytical, problem-solving, and stakeholder engagement capabilities.

Senior Change Analyst: An individual who performs a more senior role through experience in conducting an analysis in the change management discipline related to the specific scope required.

Senior Change Manager: An individual with an extensive level of change management experience and is responsible for leading all aspects of a change management program.

Senior Communications Manager: An individual with an extensive level of communications management experience and in charge of overseeing communications campaigns, ensuring its messaging is consistent and engaging as related to the specific scope required.

Senior Creative Writer: An individual that produce various forms of literary and creative writing such as various forms of reports and articles that may be of interest to the organisation and is available to be published / used across a range of the media or products related to the specific scope required.

Senior Data Analyst: An individual that assists with interpreting statistical and numerical data to assess and compare the performance between data sets using existing intelligence processes to develop effective business solutions.

Senior Human Capital Advisory Consultant: A senior, more experienced individual who provides advanced professional Human Capital advice and guidance related to the specific scope required.

Senior Information Analyst: A senior, more experienced individual / technical expert who provides more informed advice, deeper analysis and interpretation of information for activities related to the specific scope required and who guides and directs other professional employees and solves complex issues.

Senior Lean Six Sigma (Black Belt) Specialist: is a certified and experienced business improvement professional who provides strategic leadership, technical oversight, and quality assurance for large-scale operational excellence and transformation initiatives. The role includes leading complex cross-functional projects, mentoring Lean Six Sigma practitioners, applying advanced analytical and statistical methodologies, and ensuring the delivery of measurable and sustainable improvements in service delivery, resource utilisation, and organisational performance.

Senior Organisational Design Consultant: A seasoned expert who leads and advises on the design or redesign of organisational structures, operating models, and ways of working to ensure alignment with strategy and long-term objectives. The role combines deep organisational design expertise with strategic thinking, leadership influence, and change capability.

Senior Researcher: An experienced research professional who leads complex research projects and provides expert insight to inform strategy, policy, or practice. The role combines advanced methodological expertise with leadership, critical thinking, and the ability to translate evidence into meaningful recommendations.

Senior Talent Management Consultant: An experienced specialist who advises organisations on how to attract, develop, engage, and retain talent in alignment with business strategy and future capability needs. The role combines deep expertise in talent practices with strategic insight, consulting skills, and leadership influence. Typically, would lead the design and implementation of talent management strategies and frameworks, advise on succession planning, performance management, learning, and leadership development and diagnoses talent risks, capability gaps, and workforce trends.

Specialist Content Facilitator: a professional who enables effective engagement, understanding, and application of specialised content by guiding individuals or groups through learning or communication experiences. The role focuses on facilitating—not just delivering—content to ensure it is understood, contextualised, and applied in practice.

Strategic and professional advisor: An individual who acts as advisor to senior officials or stakeholders and can make recommendations which help shape significant policies or programs and key project deliverables.

Student Psychologist: An individual registered with the Health Professions Council of South Africa (HPCSA) as a psychology student and enrolled at an HPCSA-approved educational institution in an academic psychology qualification. A student psychologist is not a registered practitioner, may not render psychological services to the public, may not practise independently, and may not present themselves as a psychologist. Any practical exposure is limited to curriculum-based learning activities conducted under institutional supervision and does not constitute professional psychological practice.

System Development Specialist: An Individual who concentrates primarily on a particular subject or activity related to systems development, a person highly skilled in systems development as a specific and restricted field related to the specific scope required.

Talent Management Consultant: a professional who supports organisations in attracting, developing, engaging, and retaining talent to meet current and future business needs. The role focuses on designing and improving talent practices that align people capabilities with organisational strategy. Typically, would assist in designing and implementing talent management frameworks and processes. Supports initiatives such as performance management, learning and development, and succession planning. Analyses workforce data to identify capability gaps and talent risks.

Team members: Are employees of the service provider responsible for the execution of operational, technical or support activities within the scope of services, under the direction of the Key Account Executive.

Train the Trainer / Trainer of Trainers: A trainer who trains other suitably competent trainers to deliver a pre-packaged, developed training course. This would include supporting trainers through the development of instructional Trainers' Manuals and other instructional aids, as well as using a specific methodology to evaluate and accredit trainers to train learners in a specific training programme.

2.2.1.1.5.1 MINIMUM SCORE FOR FUNCTIONALITY

Only those tenders submitted by tenderers who achieve the minimum score for functionality as stated below will be declared responsive.

The description of the functionality criteria and the maximum possible score for each is shown in the tables below. The score achieved for functionality will be the sum of the scores achieved, in the evaluation process, for the individual criteria

Examples / evidence of experience, expertise, facilitation and resources for Parts A to H, as listed below, must be submitted as a company profile with content for experience and expertise and CVs of resources and facilitators. This is also confirmed in Schedule F.13 as documents to be submitted with this tender. Schedule F.15 to F.20 must also be completed as part of the tender submission. To follow is an introduction to each part and the functionality scoring tables for all parts of this tender.

PART A: DESIGN, DEVELOPMENT AND DELIVERY OF LEADERSHIP DEVELOPMENT PROGRAMMES
--

1. Purpose

This Part evaluates a tenderer's capability, experience, expertise, and resource capacity to:

- Design and develop leadership development programme content; and
- Facilitate, deliver, and support learner engagement for leadership development programmes for the City of Cape Town (CCT), across all leadership levels within a large, complex organisational environment.

Tenderers may demonstrate capability in one or both of the above areas. However, submissions will be evaluated against the relevant criteria for:

- Leadership programmes content design; and
- Leadership programme facilitation and delivery

Important Notes

- Tenderers must clearly distinguish between:
 - Content design and development (what was created); and
 - Facilitation and delivery (what was implemented and how learning was enabled)
- Failure to clearly differentiate these areas may negatively impact scoring.
- Tenderers MUST read this Part together with the Specifications in Section 5.

2. Leadership Levels Covered

Tenderers must demonstrate capability across all three (3) leadership levels:

a. Supervisory / Team Level

Employees responsible for day-to-day supervision of operational teams and frontline service delivery. Focus areas include:

- Task allocation and oversight
- Compliance with procedures
- First-line people management
- Team performance and service delivery

b. Middle Management / Heads Level

Employees responsible for managing functions, divisions, or multiple teams. Focus areas include:

- Translating strategy into operational plans
- Managing resources and budgets
- Aligning performance with organisational objectives
- Balancing operational delivery with stakeholder expectations

c. Senior Leadership Level

Employees responsible for strategic leadership and organisational performance. Focus areas include:

- Strategic direction and decision-making
- Governance and accountability
- Organisational performance and sustainability
- Engagement with executive, political, and external stakeholders

Important Notes

- Evaluation is based on scope of responsibility, not job titles or job grading alone
- Submissions must demonstrate clear differentiation across leadership levels, including:
 - Programme depth and complexity
 - Learning outcomes and behavioural focus
 - Delivery or facilitation approach
- Generic submissions that do not distinguish between levels will be treated as covering one level only

3. Definition of Organisational Complexity

For the purposes of this tender, a large, complex organisation is defined as one that:

- Employs 3,000 or more employees;
- Has multiple business units or divisions;
- Operates across functional and/or geographic areas; and
- Includes complex reporting lines and spans of control

All examples provided must clearly demonstrate experience within organisations that meet this definition. Lack of clarity may negatively affect scoring.

4. Alignment with Evaluation Criteria

Tender submissions, including the company profile, will be evaluated based on completed or ongoing projects (2021 to present).

A. EXPERIENCE

A1. Leadership Development Programmes Content Design

Tenderers must demonstrate experience in designing leadership development programme content across all three leadership levels.

Evidence must include:

- Organisation size and complexity
- Programme scope, duration, and strategic focus
- Target population and leadership level
- Leadership design artefacts (e.g. curricula, learning journeys, modules)
- Content design methodology used
- Evidence of differentiation across leadership levels

Programme Design and Methodology -

Submissions must demonstrate:

- A clear and structured content development approach
- Programme or curriculum architecture across leadership levels
- Application of diverse learning methodologies (e.g. simulations, case studies, action learning, experiential learning)
- Integration of modern approaches (e.g. neuroscience-informed learning, applied learning methods)
- Examples of tools, materials, and frameworks developed
- Evidence of how content supports:
 - Behavioural change
 - Leadership decision-making
 - Capability development aligned to organisational strategy, culture, and values

A2. Leadership Development Programme Facilitation and Delivery

Tenderers must demonstrate facilitation and delivery experience across all three leadership levels within large, complex organisations.

Facilitation Evidence Requirements -

Submissions must include:

- Facilitation methodologies applied
- Delivery formats (in-person, virtual, hybrid)
- Session outputs, reports, or outcomes
- Tools or assessments used during facilitation
- Duration and timelines, supported by:
 - Agendas
 - Session plans
 - Delivery schedules
- Methods used to establish and maintain psychological safety
- Innovation in facilitation techniques and learner engagement
- Learning methodologies applied (e.g. simulations, experiential learning)
- Reports or presentations delivered to clients
- Demonstrated value added through facilitation

Scale of Experience -

Tenderers must indicate:

- Number of comparable organisations served
- Organisation size
- Scope of facilitation
- Number of participants or stakeholders engaged

B. TECHNICAL EXPERTISE – MEASUREMENT AND REPORTING

B1. Measurement Design (Content)

Tenderers must demonstrate capability to design programme effectiveness measurement approaches, including:

- Pre- and post-assessment design (typically within 12–18 months)
- Measurement frameworks and tools
- Indicators for:
 - Learning effectiveness
 - Behavioural change
 - Organisational impact
- Data requirements and structuring approaches
- Continuous improvement mechanisms based on findings

B2. Measurement Implementation (Facilitation)

Tenderers must demonstrate capability to support programme measurement during delivery, including:

- Application of assessment tools
- Tracking behavioural change and learning transfer
- Monitoring individual, team, or organisational outcomes over time

B3. Reporting and Close-Out

Tenderers must provide examples of:

- Dashboards and structured reports
- Data extracts or outputs shared with clients
- Close-out reports or presentations
- Synthesised findings and actionable recommendations

C. RESOURCE AND TEAM CAPABILITY

C1. Facilitator Experience

Tenderers must provide Curriculum Vitae (CVs) (Schedule F.19) for proposed facilitators demonstrating:

- Relevant facilitation experience
- Experience within large, complex organisations
- Capability to deliver programmes both virtually and in-person

Evidence must reflect experience across:

- Lead / senior facilitators
- Facilitators
- Subject matter experts (where applicable)

C2. Content Design Resources

Tenderers must demonstrate availability of:

- Strategic or professional advisors
- Leadership development specialists
- Content designers
- Programme or account managers
- Supporting team members

Evidence must include:

- CVs indicating:
 - Design experience
 - Experience in large organisations
 - Qualifications and professional background
- Number of resources available
- Years of relevant experience

D. DELIVERY CAPACITY AND LOGISTICS

D1. Programme Resourcing and Capacity

Tenderers must demonstrate:

- Sufficient number of facilitators and delivery resources
- Programme and account management capability
- Ability to deliver multiple programmes concurrently
- Experience delivering at scale within large organisations

D2. Facilitation Logistics and Delivery

Tenderers must demonstrate capability to support programme logistics, including:

- Venue sourcing and accessibility
- Catering aligned to City policy
- Provision of learning materials and facilitation aids
- Virtual delivery aligned to City IS&T infrastructure (e.g. MS Teams)

Evidence must demonstrate operational readiness for delivery across the City.

5. Intellectual Property

All intellectual property developed specifically for the City of Cape Town under this Part, including:

- Content and curricula
- Frameworks and tools
- Learning materials
- Measurement outputs
- Facilitation artefacts shall vest in the City of Cape Town.

6. Summary of Evaluation Focus

This Part evaluates the tenderer's ability to:

- Design high-quality, future-fit leadership development content
- Deliver impactful facilitation and learning experiences
- Apply credible measurement and reporting practices
- Operate at scale within a complex organisational environment

Assessment Dimensions

- Breadth of capability (what is delivered and how)
- Depth and quality of approach
- Scale of delivery and applicability
- Repeatability and consistency of performance

7. Important Notes

- Only work from 2021 to present will be evaluated
- Submissions must clearly distinguish between design and facilitation
- All evidence must align with the definition of organisational complexity
- Generic or unclear submissions may result in lower scoring
- All documentation must be:
 - Complete
 - Clearly referenced
 - Aligned to the evaluation criteria

Part A: Design, development and delivery of leadership development programmes

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
1.	Experience- Experience in the design of leadership development programmes across three levels of leadership in large, complex organisations in the last 5 years (2021–present) a) Supervisory / Team level b) Heads and Management c) Senior Leadership Examples must include organisation size, scope, duration and programme design artefacts (e.g. curriculum structures, module outlines). (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	1.1 Experience in the design of content for leadership development programmes (30 points) Tenderers must submit documented evidence of leadership development programmes designed within the last five (5) years (2021–present) for large, complex organisations comparable to the City of Cape Town, defined as organisations that: • employ 3 000 or more employees; and • comprise multiple business units or divisions; and • operate across several functional or geographic areas; and • contain leadership environment with multiple reporting lines. Evidence must relate to completed or implemented programmes (not proposals) Evidence must demonstrate content design work across all three leadership levels: a) Supervisory / Team level b) Heads and Management c) Senior Leadership For each example submitted, tenderers must clearly evidence the following eight (8) content design dimensions: 1. Programme scope (target population, leadership level, strategic behavioural focus). 2. Programme duration & high-level timelines 3. Programme design artefacts (e.g. curriculum structures, module outlines, learning journeys). 4. Content development	Coverage of the 8 content design aspects (0–30 points): Evidence clearly addresses all 8 content design dimensions = 30 points Evidence addresses 6–7 content design dimensions = 25 points Evidence addresses 4–5 content design dimensions = 20 points Evidence addresses fewer than 4 content design dimensions = 10 points Evidence addresses none of the content design dimensions = 0 points Note: Programme duration will not be assessed on length alone, but on whether the proposed duration and sequencing are appropriate to the leadership level and intended learning and behavioural outcomes. Evidence may include explanation of how the programme structure allows for learning application, reflection, reinforcement and progression appropriate to the leadership level.	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		approach and design methodology 5. Programme or curriculum architecture demonstrating differentiation across leadership levels (e.g. different themes, depth, outcomes for each level). 6. Learning methodologies applied (e.g. experiential learning, action learning, simulations, peer learning). 7. Integration of modern learning trends (e.g. blended, digital, applied, neuroscience-informed learning) 8. Alignment of content to organisational strategy, culture, and leadership capability outcomes		
1.2 Scale of Comparable Experience (20 points)				
		Tenderers must indicate the number of comparable organisations (3 000+ employees, similar complexity) for which they have designed leadership development content across all three (3) leadership levels. Evidence must include: - The number of comparable organisations (3 000+ employees) for which the tenderer has designed leadership development content across all three leadership levels, including: - organisation size (number of employees); and - indicators of organisational complexity (business	Number of comparable organisations (0–10 points): Leadership programme content development across all three levels of leadership delivered to: More than 7 organisations of the same complexity as the CCT = 10 points 6–7 organisations of the same complexity as the CCT = 8 points 4–5 organisations of the same complexity as the CCT = 6 points 2–3 organisations of the same complexity as the CCT = 4 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		units/ divisions and functional or geographic spread). The years of experience of the tenderer specifically in developing, creating and designing content/material/products for leadership development programmes and related interventions in large, complex organisations (3 000+ employees; multiple business units or divisions; several functional or geographic areas).	1 organisation of the same complexity as the CCT = 2 points - None of the organisations are of the same complexity as the CCT = 0 points 5 years' or more years' experience = 10 points 3 – 4 years' experience = 7 points 1 – 2 years' experience = 4 points No experience = 0 points	10
		1.3 Leadership Levels covered in Content development and design (20 points)		
		Tenderers must submit documented evidence of leadership development programme design (within the last five (5) years, 2021–present) for the following leadership levels: - Supervisory / Team Level - Heads / Middle Management Level - Senior Leadership Level For each level claimed, tenderers must provide: - A programme outline or curriculum structure, and Learning objectives or intended outcomes, and - Indication of the target leadership group	Evidence meets all 3 leadership levels with required= 20 points Evidence meets any 2 leadership levels= 10 points Evidence meets only 1 leadership level or no relevant evidence submitted= 0 points	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		Evidence must be specific to each level. Generic or undifferentiated submissions (i.e. one programme presented as applicable to all levels without clear distinction) will only be counted as one level .		
2.	Leadership Development Programme facilitation, delivery and learner engagement experience Note: To be considered for this part of the tender, the tenderer must be able to show evidence of experience and must be capable of facilitating across four different levels of leadership: - Supervisory / Team level (Task level T13 and below) - Heads and Management level (Task level T14 – T19) - Senior Leadership level (Task level T19 – T25) TASK levels are provided for reference only and do not replace leadership role scope. (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	Tenderers must provide examples of leadership development programme facilitation completed or currently in progress within the last five (5) years (2021–present) Examples must demonstrate facilitation across all three leadership levels and must relate to large, complex organisations (3 000+ employees, multiple business units/ divisions, multiple functional or geographic areas). Examples must include evidence of: - facilitation methodology used; - findings captured during facilitated sessions; - tools or assessments used during facilitation; - duration and timelines, including session agendas or delivery schedules; - methods used to establish and maintain psychological safety (e.g. facilitation techniques that promote trust, respectful dialogue, and inclusive participation) - creativity and innovation in facilitation techniques and materials; - preferred learning formats used (e.g. simulations, experiential learning); and	Evidence addresses all eight (8) elements = 30 points Evidence addresses seven (7) -six (6) elements = 25 points Evidence addresses five (5) -four (4) elements = 20 points Evidence addresses three (3) - two (2) elements = 15 points Evidence addresses less than two elements = 10 points Evidence addresses none of the elements = 0 points	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		8. reports or presentations formally delivered to the client. Elements are scored on presence or absence only; depth or quality is not assessed under this sub-criterion.		
		Tenderers must indicate the number of comparable organisations (3 000+ employees) for which leadership development programmes were facilitated across all three leadership levels Evidence must include organisation size and indicators of complexity (business units/divisions and functional or geographic spread). Evidence must include: Number of organisations with the Organisation size (number of employees) and complexity (number of business units/divisions, functional/geographic spread).	More than 7 comparable organisations = 10 points 6–7 comparable organisations = 8 points 4–5 comparable organisations = 6 points 2–3 comparable organisations = 4 points 1 comparable organisation = 2 points No comparable organisations = 0 points	10
3	Technical Expertise- assesses the tenderer's proposed methodology and technical capability to design an effectiveness measurement framework for leadership development content for this contract. Tenderers should reference prior experience to explain or motivate their proposed approach.	3.1 Measurement Framework: Leadership Content Effectiveness and Impact (20 points)		
		The tenderer must describe and demonstrate the method used for measuring the effectiveness of leadership development programme content, including the following 3 criteria: 1. The design of a pre-assessment and post-assessment approach, applied for programme content. 2. A measurement tool or framework designed to determine: a. the effectiveness of leadership content and learning material; and b. the impact of the learning in achieving desired individual, team, and organisational outcomes. 3. A description of how the measurement tool	The tenderer clearly explains a complete and connected approach to measuring the effectiveness of leadership development programme content with all 3 criteria evident = 20 points The tenderer explains how programme effectiveness will be measured with 2 criteria evident = 15 points The tenderer explains how programme effectiveness will be measured with 1 criterion evident = 10 points The tenderer does not provide evidence of a measure of effectiveness	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		enabled the extraction of structured data in a usable format to support analysis and reporting on programme effectiveness, including ongoing content improvement over time. The proposed method does not need to have been implemented previously but must demonstrate suitability for leadership development programmes of comparable scope and complexity.	with none of the criteria evident = 0 points	
3.2 Behaviour change and outcome tracking methods.				
		Tenderers must describe their capability to support the measurement of leadership programme effectiveness during facilitation, by describing: 1. use of pre- and post-assessment approaches (within the past 5 years from 2021- present); 2. tools or methods used to assess application of learning and behavioural change; and 3. approaches used to track individual or organisational outcomes over time.	Capability is clearly described across all three requirements = 10 points Capability described but one requirement omitted = 5 points Capability described but two requirements omitted = 0 points	10
2.3 Reporting and Close-Out				
		Tenderers must provide examples of reporting and close- out outputs relevant to facilitated programmes, such as: 1. examples of dashboards, reports, or structured data extracts used during or after facilitation; 2. close-out reports or presentations; and recommended next steps	Evidence includes all three elements = 10 points Evidence provided but one element omitted = 5 points More than one element omitted or no reporting or close-out evidence = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
4	Resources This criterion assesses whether the tenderer has sufficient, suitably experienced human resources available to design and develop diagnostics and bespoke leadership development content for the City of Cape Town. This criterion assesses current and allocated resources , not general organisational capacity. (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	4.1 Resources and years of experience (20 points)		
		The submission must clearly describe the people who will be assigned to City of Cape Town projects, including their roles, availability, and relevant experience in leadership content development for large, complex organisations including: • Strategic or professional advisors are senior specialists who provide thought leadership, quality assurance, and oversight on leadership content design and diagnostic approaches. • The years of experience of individual key account executives assigned to City projects, specifically in developing, creating and designing content/material/ products for leadership development programmes and related interventions in large, complex organisations (3 000+ employees; multiple business units or divisions; several functional or geographic areas).	1) Strategic / Professional Advisors (0–10 points) Three (3) or more strategic / professional advisors are available to support City of Cape Town leadership content projects= 10 points Two (2) strategic / professional advisors are available = 5 points One (1) strategic / professional advisor is available= 2 points Zero (0) strategic / professional advisors = 0 points	10
			2) Years of Experience of Key Account Managers (0–10 points) For the Key Account Executives and Managers responsible for City of Cape Town leadership content development projects: • 9 and more years' experience = 10 points • 6 - 8 years' experience = 8 points • 3 - 5 years' experience = 6 points • 1 - 2 years' experience = 4 points • No experience = 0 points	10
		4.2 Content Development Team		
		• Dedicated Content Development Team includes key account executives and managers, learning designers, curriculum developers, and other specialists directly	1) Dedicated Content Development Team (0–10 points) • 6 and more dedicated content development team	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		involved in the design of leadership development content and diagnostics assigned to City of Cape Town projects	resources = 10 points • 5 dedicated content development team resources = 8 points • 4 dedicated content development team resources = 6 points • 3 dedicated content development team resources = 4 points • 2 dedicated content development team resources = 2 points • 1 or less dedicated content development team resources = 0 points	
		4.3 Facilitator Capacity		
		Tenderers must demonstrate that they have sufficient facilitator capacity to deliver leadership development programmes at scale within large, complex organisations comparable to the City of Cape Town (3,000+ employees). The submission must clearly indicate: 1. the total number of facilitators available to support programme delivery; 2. the roles of facilitators, including lead facilitators, facilitators, and specialist or subject matter expert facilitators (where applicable); 3. availability of facilitators for City of Cape Town programmes; capability to deliver programmes across multiple formats, including in-person,	• 4–5 elements addressed= 10 points • 3 elements addressed= 6 points • 2 elements addressed= 2 points • 1 element or none addressed= 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		virtual (e.g. MS Teams), and hybrid delivery; 4. experience facilitating leadership development programmes across all three leadership levels (Supervisory, Middle Management, Senior Leadership). 5. demonstrate the ability to deliver multiple programmes concurrently and provide evidence of facilitation within large, complex organisations.		
		4.4 Years of experience of Key Personnel (20 points)		
		Tenderers must demonstrate capacity to deliver leadership programmes at scale, including: the years of experience of key personnel operating within large, complex organisations.	1) Strategic / Professional Advisors (0–5 points) 9 or more years' experience = 5 points 6 – 8 years' experience = 3 points 3 – 5 years' experience = 1 point - Less than 3 years or no relevant experience = 0 points 2) Facilitators (0–5 points) 7 or more years' experience = 5 points 4 – 6 years' experience = 3 points 1 – 3 years' experience = 1 point - No relevant experience = 0 points 3) Delivery Team (0-5 points) 9 or more delivery team resources = 5 points 5 - 8 delivery team resources = 3 points	5 5 5

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
			• 2 – 4 delivery team resources = 1 points • 1 or less delivery team resources = 0 points 4) Collective years of Experience of delivery team (0–5 points) • 7 or more years' experience = 5 points • 4 – 6 years' experience = 3 points • 1 – 3 years' experience = 1 point • Less than 1 year or no relevant experience = 0 points	5
5		5.1 Logistics and Delivery Tenderers must demonstrate the ability to support programme delivery logistics, including: 1. venue sourcing and accessibility; 2. catering aligned to City policy; 3. learning materials and facilitation aids; and 4. virtual delivery aligned to City Information Systems & Technology infrastructure (e.g. MS Teams).	All four requirements clearly demonstrated = 10 points One or two requirements omitted = 5 points No credible logistics capability with none of the four requirements listed = 0 points No credible logistical or delivery support evidence provided. (0 points)	10
				220 points

The minimum qualifying score for functionality is **154 points (70%)** out of a maximum of **220 points**.

PART B: ORGANISATIONAL DEVELOPMENT INTERVENTIONS DESIGN AND FACILITATION

Tenderers MUST read this Part together with the Specifications Section C5.
Failure to cross reference may negatively affect scoring.

1. Purpose of Part B

Part B relates to the **design and facilitation of Organisational Development (OD) interventions, excluding Leadership Development Programmes**, which are evaluated separately under **Part A**.

This Part evaluates a tenderer's capability to:

- diagnose organisational and team- based challenges;
- design appropriate Organisational Development interventions; and
- facilitate Organisational Development processes and workshops

within **large, complex organisational environments comparable to the City of Cape Town**.

The tender submission will be evaluated based on **examples of Organisational Development (OD) interventions** that were **designed and/or facilitated within the last five (5) years** (projects initiated from **2021 to present**).

2. Scope of Organisational Development Interventions

Organisational Development interventions under this Part may include, but are not limited to:

- organisational or team behaviour and culture interventions;
- team effectiveness and team enablement interventions;
- organisational effectiveness and business improvement initiatives; and
- strategy alignment and cross-functional alignment workshops.

3. Important Clarifications

- **Intellectual Property:** All intellectual property, materials, content, frameworks, tools, documentation, learning assets, and outputs developed specifically for the City of Cape Town under this Part shall vest in the City of Cape Town.
- OD interventions may be delivered **virtually, in person, or in hybrid format**, using **City-approved platforms** (for example, MS Teams).
- Where psychometric tools form part of an OD intervention, **proof of HPCSA registration** is required for relevant facilitators.
- Appointment under **Part B does not imply appointment under Part A**
- For the purposes of this Part, a **large, complex organisation** is defined as an organisation that:
 - employs **3 000 or more employees**;
 - comprises **multiple business units or divisions**; and
 - operates across **several functional and/or geographic areas**.

All examples submitted must reflect work conducted in organisations of comparable complexity, as defined above.

Tender submissions must include a **comprehensive company profile**, together with clearly structured information relating to **experience, facilitation capability, expertise in synthesis and reporting, and resources and capacity**, as described below.

4. Experience – Organisational Development Interventions

Tenderers must provide evidence of **completed or ongoing Organisational Development interventions**, with particular emphasis on **team and organisational effectiveness interventions**.

Examples must demonstrate experience in facilitating interventions that typically address **complex team and organisational dynamics**, where team members may have different strengths, working styles, preferences, and approaches to tasks.

Such dynamics may include, but are not limited to:

- interpersonal conflict or strained working relationships;
- poor communication or collaboration;
- stress, change fatigue, or low morale;
- underperformance or lack of role clarity;
- misalignment of roles, responsibilities, or processes.

The submission must demonstrate the tenderer's ability to **design and facilitate half-day and/or full-day OD workshops or sessions** that respond to the above dynamics and apply **appropriate OD tools and methods** to support sustainable solutions.

For each example, tenderers must clearly indicate:

- the **client context** and organisational scale;
- the **OD objectives** of the intervention; and
- the **value added through facilitation**, including the role played by the OD intervention in achieving the broader organisational or team outcomes.

Examples of OD interventions conducted within **large organisations of comparable size and complexity to the City of Cape Town** must be provided.

OD Evidence Considered Under This Criterion

Evidence may include, but is not limited to, documentation, artefacts, reports, or descriptions demonstrating the following:

- **Organisational Development diagnostic methodologies** applied, including examples of diagnostic outputs or reports (for example, culture assessments, engagement analyses, or workforce diagnostics);
- **content development approaches** used in designing Organisational Development interventions;
- **facilitation methodologies** applied, where virtual, in-person, or hybrid delivery formats were used;
- **approaches used to manage and respond to complex team dynamics** during interventions (for example, conflict, resistance, misalignment, or change fatigue);
- **team or organisational assessment tools** applied to identify strengths, preferences, capabilities, and development areas;
- **OD content and supporting materials** addressing sustainable ways of working together and resolving identified challenges;
- **methods used to establish and maintain psychological safety** during OD facilitation, defined for the purposes of this tender as *the deliberate creation of a facilitation environment in which participants feel safe to speak openly, challenge ideas respectfully, and contribute without fear of negative consequences* (for example, use of agreed group norms, confidentiality assurances, inclusive facilitation techniques, and skilled management of power dynamics);
- **the duration and structure of interventions**, including examples of completed project plans, schedules, or phased delivery approaches;
- **creativity and innovation in facilitation approaches**, where such methods contributed to effective outcomes;
- **learning approaches applied**, such as neuroscience-informed methods, psychology-based approaches, coaching techniques, case studies, scenarios, or practical experiential learning;
- **methods used to assess the effectiveness of Organisational Development interventions**, including evaluation of behavioural, team, or organisational shifts;
- **synthesis of information gathered** during the OD process, demonstrating the ability to integrate insights across themes, behaviours, and system dynamics;
- **reports or presentations delivered** to line departments or key stakeholders, demonstrating clear analysis and actionable recommendations; and
- **the scale and complexity of recent Organisational Development interventions**, including organisation size, structural complexity, and the number of participants or stakeholders involved.

5. Facilitation Capability

Tenderers must demonstrate adequate knowledge and experience in facilitating OD interventions of the nature described above. This must include:

- a description of OD models, methodologies, assessments, and tools used; and
- Curriculum Vitae (CVs) **as per schedule F.19 in this tender**, of facilitators proposed for this Part.

CVs must clearly demonstrate:

- relevant years of experience facilitating OD and team interventions;
- experience facilitating interventions in large, complex organisational environments; and
- the ability to facilitate interventions using virtual, in-person, and hybrid delivery formats.

Experience should be demonstrated across OD interventions involving:

- team effectiveness and enablement;
- behavioural and cultural change;
- organisational or strategic alignment; and
- complex group or system dynamics.

6. Expertise – Documentation, Synthesis, and Reporting of OD Outcomes

Tenderers must demonstrate an approach to capturing, synthesising, and reporting outcomes arising from Organisational Development facilitation interventions.

The proposed approach must include evidence of:

1. a clear method for capturing OD insights (including themes, behaviours, and group dynamics);
2. pre- and post-intervention assessment of behavioural shifts or key organisational or team themes;
3. a structured synthesis and reporting methodology, including:

- an executive summary;
 - key themes and insights;
 - risks and implications; and
 - recommendations for further action; and
4. POPIA-compliant reporting practices, demonstrated through anonymisation and aggregation (no identifiable individual or team data).

Examples of OD reports, close-out documentation, or presentations must be provided and must demonstrate analysis and synthesis, not purely descriptive summaries.

7. Resources and capacity

Tenderers must demonstrate that they have **sufficient, appropriately experienced, and available resources** to support Organisational Development interventions **at scale** for the City of Cape Town. Submissions must include evidence of the following:

- **Dedicated Key Account Manager(s)** responsible for OD contracting, coordination, and client liaison, with demonstrated experience managing OD or people-related interventions in **large, complex organisations (3 000+ employees)**;
- **Strategic and professional OD advisors** available to support the City, with relevant experience in organisational and team development interventions;
- **Availability of Lead and Support facilitators** to deliver interventions as required;
- **Curriculum Vitae (CVs)** for proposed advisors, facilitators, and key account managers, clearly confirming:
 - experience in Organisational Development intervention design and facilitation;
 - experience working within **large, complex organisational environments**; and
 - role responsibility and years of relevant experience;
- A **declaration confirming the availability of proposed resources** to support City interventions for the duration of the contract; and
- Where psychometric tools form part of the offering, **proof of registration with the HPCSA** for the relevant employees involved. **Note that no such resource will be utilised for any intervention unless proof of up-to-date registration with the HPCSA can be provided by the tenderer.**
- The tenderer's resource capability must demonstrate the ability to **support multiple concurrent OD interventions** and maintain **sustained engagement over time** within a complex metropolitan organisation.

Part B: Organisational Development Interventions Design and Facilitation

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
1	Experience- OD interventions designed and/or facilitated in the last five (5) years (projects initiated from 2021 to present) must be submitted. Organisational Development processes generally include the following lifecycle phases: 1. entering and contracting; 2. diagnosing; 3. reporting; 4. joint action planning; 5. intervention implementation; and	1.1 Core OD and Team Interventions		
		Tenderers must provide examples of OD interventions designed and facilitated within the required timeframe. Each example must demonstrate experience across the OD lifecycle phases listed above and must include evidence of the following nine (9) elements: 1. OD process methodology applied, with examples from each relevant phase; 2. diagnostic approaches used (for example, culture diagnostics, engagement data, workforce data); 3. intervention design methodology;	All nine (9) elements demonstrated = 30 points 7–8 elements demonstrated = 25 points 5–6 elements demonstrated = 20 points 3–4 elements demonstrated = 15 points Fewer than 3 elements demonstrated = 0 points	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	6. monitoring and evaluation. These phases reflect a single OD lifecycle and are used consistently throughout Part C. (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	4. facilitation methodology used (virtual, in-person, or hybrid); 5. team or organisational assessments and OD tools applied; 6. methods used to establish and maintain psychological safety (for example, agreed ground rules, inclusive facilitation practices, trust-building techniques); 7. ethical OD practice, including facilitator neutrality and confidentiality (for example, ethical guidelines or contracting principles applied); 8. project timelines and completed project plans; and 9. evidence of team enablement outputs (for example, team charters, action plans, or behaviour agreements).		
		1.2 Scale of Comparable Experience (10 points)		
		Tenderers must indicate the number of organisations of comparable size and complexity (3 000+ employees) for which OD interventions were designed and/or facilitated. Evidence must include organisation size and indicators of complexity (business units/divisions and functional or geographic spread).	Interventions delivered to 4 or more comparable organisations = 10 points Interventions delivered to 3 organisations = 8 points Interventions delivered to 2 organisations = 6 points Interventions delivered to 1 organisation = 4 points No comparable organisations = 0 points	10
2	Facilitation Capability	2.1 OD Intervention Facilitation Capability		
	(Complete a summary of the tenderer's resources in schedule F.15, utilise the CV template in schedule F.19 and a declaration of resources availability in	Tenderers must provide Curriculum Vitae (CVs) for facilitators proposed for OD interventions. Facilitators must demonstrate experience facilitating OD and team interventions in large, complex organisations, using	More than 9 years' experience = 15 points 6–9 years' experience = 10 points 3 – 5 years' experience = 5 points	15

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	schedule F.20 in this tender)	both virtual and in-person delivery formats.	2 or less years' experience = 0 points	
3	Expertise	3.1 Expertise – Documentation Synthesis and Reporting of OD Outcomes		
		Tenderers must demonstrate an approach to capturing, synthesising, and reporting outcomes from OD facilitation interventions. The approach must include evidence of: 1. a clear method for capturing OD insights (themes, behaviours, group dynamics); 2. pre- and post-intervention assessment of behavioural/ strategic shifts or themes; 3. structured synthesis and reporting methodology, including: - o executive summary; - o key themes and insights; - o risks and implications; and - o recommendations for further action	All three (3) requirements / evidence demonstrated = 20 points Two (2) requirements / evidence demonstrated = 15 points One (1) requirement / evidence demonstrated = 10 points Zero (0) requirements demonstrated = 0 points	20
4	Resources and Capacity (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	4.1 Resources and Capacity (25)		
		Tenderers must demonstrate sufficient capacity to support OD interventions at scale. Submissions must include evidence of: 1. Experienced Key Account Manager(s) (KAM) responsible for OD contracting and coordination; 2. availability of lead OD facilitators and OD facilitators; 3. Delivery Team includes strategic and professional OD advisors and facilitators available to the City; and 4. CVs confirming experience in large, complex organisational environments.	1) Key Account Management • 5 or more years' experience managing OD/People projects = 5 points • 3 - 4 years' experience = 3 points • 2 or less years' experience = 0 points 2) Lead OD facilitators (0–5 points) • 5 or more lead OD facilitators = 5 points • 2 – 4 lead OD facilitators = 3 points • 1 or less lead OD facilitators = 0 points 3) OD Facilitators (0-5 points)	5
				5

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
			• 5 or more OD facilitators = 5 points • 2 – 4 OD facilitators = 3 points • 1 or less OD facilitators = 0 points Collective years of Experience of delivery team (0–5 points) • 10 or more years' experience = 10 points • 6–9 years' experience = 5 points • 3 - 5 years' experience = 2 points • 1 – 2 years' experience = 1 points • No experience = 0 points	10
				Total 100

The minimum qualifying score for functionality is **70 points (70%)** out of a maximum of **100 points**.

PART C: ORGANISATIONAL EFFECTIVENESS & INNOVATION FUNCTIONAL EXPERTISE

Tenderers **MUST** read this Part together with the Specifications Section 5.
Failure to cross reference may negatively affect scoring.

1. Purpose of Part C

The tender submission will be evaluated using **examples of Functional Expert services delivered within the last five (5) years** (projects initiated from **2021 to present**).

Part C relates **exclusively** to the provision of **Functional Experts** who deliver **expert-led, content-driven engagements** within **large, complex organisational environments comparable to the City of Cape Town**.

These engagements include **thought leadership, specialist training, keynote speakers/ talks, strategic dialogue facilitation, and enterprise-wide learning**. For the purposes of this Part, such engagements **do not result in formal strategic plans, implementation roadmaps, or organisational redesign outputs**.

This Part evaluates a tenderer's **capability, experience, and resource capacity** to:

- provide recognised subject-matter experts with deep, credible expertise in specialised functional domains;
- deliver high-impact thought leadership and strategic insights to employees;
- facilitate thematic learning sessions, masterclasses, and enterprise enablement workshops;
- provide specialist training aligned to functional disciplines (**excluding leadership programme delivery and OD interventions**); and

- support the City's strategic, ethical, cultural, and operational priorities through **expert-led knowledge transfer**.

Important Boundary Clarification

- Part C does **not** evaluate the design or facilitation of leadership development programmes (evaluated under **Parts A**).
- Part C does **not** evaluate Organisational Development (OD) diagnosis, OD intervention design or OD facilitation (evaluated under **Part B**).

2.Scope of Functional Expertise

Functional expert services under Part D may include, but are not limited to, the following categories.

2.1 Thought Leadership and Engagement

Functional Experts may be utilised across all organisational levels to provide **high-value expert input**, including:

- keynote addresses at senior leadership forums, strategic summits, and City-wide events, which may be supplemented with micro-learning to ensure City-wide access;
- expert-led coaching and mentoring thought leadership engagements;
- expert commentary on global trends, emerging research, and sector-specific insights;
- participation in strategic dialogues, panel discussions, and fireside chats; and
- translation of complex organisational challenges and opportunities into **clear, accessible insights** that leaders and employees can apply in practice.

Strategic conversation facilitation under Part C is **limited to content-driven expert dialogue** and expressly **excludes OD diagnostic work, systemic change facilitation or OD intervention design**.

2.2 Specialist Training and Capability Enhancement

Tenderers may provide specialist, functional-domain training in areas such as (but not limited to):

- ethics and governance (accountability);
- business improvement tools and methodologies;
- organisational design (theoretical and applied concepts only);
- innovation capability and future-thinking practices;
- diversity and neurodiversity awareness;
- customer satisfaction and service excellence (including care and openness);
- organisational behaviour and culture concepts; and
- leadership practice (content-focused and not leadership-programme or OD-intervention based).

Such training must be expert-led and content-focused and may be delivered to leaders or employees across the organisation.

2.3 Organisation-Wide Enablement and Learning

Functional Experts may support organisation-wide learning through:

- large-group learning events and enterprise-wide workshops;
- thematic learning series or learning bursts delivered via **virtual, physical, or hybrid formats**;
- awareness sessions linked to organisational priorities and culture initiatives; and
- expert-led engagements that support **cross-functional knowledge transfer**.

2.4 Facilitation of Strategic Conversations (Non-OD)

Functional Experts may facilitate:

- thematic discussions;
- specialist knowledge-based workshops;
- knowledge-sharing sessions; and
- strategic dialogue facilitation that is **content-driven and insight-focused**.

These engagements **do not include** OD process facilitation or diagnostic work and **do not result in formal strategic plans, implementation roadmaps, or organisational redesign outputs**.

2.5 Functional Areas of Expertise

Tenderers must demonstrate access to Functional Experts with recognised expertise in more than three of the following fields:

- a. Leadership practice
- b. Organisational behaviour and culture

- c. Coaching and mentoring
- d. Business improvement
- e. Organisational design
- f. Innovation
- g. Diversity, including neurodiversity
- h. Customer satisfaction
- i. Ethics and governance
- j. Other related specialist
- k. Strategy
- l. Application of Artificial Intelligence (AI) within the work of managers and leaders
- m. Workplace of the Future
- n. Areas aligned with the City's strategic focus

Tender submissions must include a **comprehensive company profile**, together with clearly structured evidence relating to **relevant experience, audience engagement and expert capability, content relevance, delivery methodology, and capacity to support delivery**, in line with the criteria below.

a) Experience:

For the purposes of Criterion 1.1:

- Each of the nine (9) required elements listed in the scoring table will be assessed on a presence-or-absence basis only.
- An element will be regarded as present only where the tenderer provides clear, explicit, and demonstrable evidence addressing that element at least once within the example(s) submitted.
- Generic statements, implied capability, or marketing claims without supporting detail will not be regarded as evidence.
- Where more than one example is submitted, the assessment will be on whether the required elements are collectively demonstrated across the examples provided.

Tenderers must provide examples demonstrating the delivery of **expert-led engagements**, including but not limited to:

- keynote presentations,
- masterclasses,
- specialist or functional training,
- expert talks, or
- large-group learning or enterprise-wide sessions.

Each example must clearly indicate:

- what the Functional Expert delivered,
- the topic or subject matter,
- the organisation served and its size,
- the audience size and type,
- delivery format (virtual, in-person, or hybrid),
- the content that was taught or explained,
- how complex subject matter was simplified for application, and
- the specific role played by the expert.

Examples must clearly demonstrate **expert-led content delivery**, not OD process facilitation or leadership programme delivery.

Scale of Comparable Experience (Criterion 1.2)

Tenderers must indicate the number of **large, complex organisations** (3,000+ employees, multiple divisions) to which Functional Expertise services have been delivered.

For each example, tenderers should specify:

- organisation size and complexity, and
- the nature of the expert engagement delivered.

Organisation names may be anonymised where necessary.

b) Audience Engagement and Expert Capability:

Tenderers must submit **Curriculum Vitae (CVs)**, as per the template provided in **schedule F.19** in this tender, for the proposed Functional Expert(s) who will deliver services under Part D, using the **mandatory CV template**.

CVs must clearly demonstrate:

- years of **expert-delivery experience** (e.g. keynotes, expert talks, masterclasses, specialist training);
- prior delivery of expert-led engagements within large or mixed audiences;
- experience addressing different audience levels within organisations (e.g. senior leaders, managers, employees); and
- experience delivering expert-led content within large, complex organisations.

Only **expert-delivery experience** will be considered. Experience related to leadership programme facilitation or OD interventions must **not** be considered under this criterion.

c) Content Relevance to Organisational Effectiveness & Innovation (OE&I)

Tenderers must demonstrate that the proposed Functional Expert(s) have delivered content aligned to **Organisational Effectiveness and Innovation (OE&I)** domains.

Each domain claimed must be supported by:

- a clear topic description; and
- at least one example showing delivery of expert-led content in that domain.

Relevant OE&I domains include, but are not limited to:

- leadership practice;
- organisational behaviour and culture;
- coaching and mentoring (conceptual or skills-based);
- business improvement;
- organisational design;
- innovation and future-thinking practices;
- diversity, including neurodiversity;
- customer satisfaction and service excellence;
- ethics and governance;
- Strategy
- Application of Artificial Intelligence within the work of managers and leaders
- Workplace of the Future
- other specialist areas aligned to the City of Cape Town's strategic priorities.

d) Methodology for Delivering Expert Content:

Tenderers must clearly explain their methodology for delivering expert-led content, including:

- how complex concepts are simplified and made accessible;
- how expert content is delivered across virtual, in-person, and hybrid formats;
- techniques used to maintain audience engagement; and
- approaches used to gather feedback or assess session usefulness.

In addition, tenderers must provide evidence of **content contextualisation**, including examples where expert content was customised to organisational context through:

- customised case studies;
- organisation-specific scenarios; and/or
- adapted frameworks or tools.

e) Capacity to Support Delivery:

Tenderers must identify a **Key Account Manager (KAM)** responsible for coordination, communication, and delivery oversight for Part C engagements. The KAM's CV must demonstrate experience managing learning, engagement, or expert-led delivery initiatives.

Tenderers must also demonstrate administrative and logistical capability to support **large-scale expert engagements**, including sessions involving **300 or more participants**.

Evidence may include experience with:

- event coordination;
- in-person event hosting;
- venue sourcing;
- virtual hosting platforms; and
- scheduling and participant communication support.

3. Distinction Between Part C and Other Parts of the Tender

To ensure clarity and avoid overlap:

Part A: Evaluates **leadership development programme content design**.

Not included under Part C.

Part A: Evaluates **facilitation of leadership development programmes**.

Not included under Part C.

Part B: Evaluates **OD diagnosis, OD intervention design, and OD facilitation**.

Not included under Part C.

Part C: Evaluates the provision of **Functional Experts** who deliver:

- thought leadership
- specialist training
- expert insights
- knowledge transfer
- content- led facilitation
- enterprise learning

Part C is **expert- led, content- driven work**, not OD-driven or leadership- programme- driven.

4. Important Clarifications

- Part C excludes all leadership content design (evaluated under Part A).
- Part C excludes leadership programme facilitation (evaluated under Part A).
- Part C excludes OD diagnosis, OD intervention design, and OD process facilitation (evaluated under Part B).

For the purposes of Part C:

- **Strategy interventions** refer to expert-led sessions intended to inform or support organisational strategic alignment and decision-making **without undertaking organisational diagnosis or OD intervention processes**.
- **Strategic thought leadership interventions** refer to expert-led engagements focused on **insight, trends, and perspective-building**, rather than the design or implementation of organisational strategy.

Additional clarifications:

- **Intellectual Property:** All intellectual property, materials, content, frameworks, tools, documentation, learning assets, and outputs developed specifically for the City of Cape Town under this Part shall vest in the City of Cape Town.
- The City shall retain the right to use, adapt, reproduce, and distribute such materials for internal, non-commercial purposes without limitation.
- Functional expert engagements may be delivered **virtually, in person, or in hybrid format**, using **City-approved platforms** (for example, MS Teams).
- Where psychometric concepts are referenced within expert content, **no psychometric assessment or administration may occur under Part C**. All psychometric work must meet the requirements set out under **Part B**, including proof of HPCSA registration.
- Appointment under Part C does **not** imply appointment under Parts A or B.
- For the purposes of Part C, organisational complexity refers to organisations that:
 - employs **3 000 or more employees**;
 - comprise multiple business units or divisions; and
 - operate across several functional and/or geographic areas.
- All examples provided must clearly demonstrate **expert-led work** within organisations of comparable complexity.
- Evidence submitted must relate to **functional expertise**, and not to OD interventions or leadership development programmes.

Where psychometric concepts are referenced, no psychometric assessment administration may occur under Part C.

Part C: Organisational Effectiveness & Innovation Functional Expertise

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
1.	Relevant Experience (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	1.1 Experience delivering expert-led sessions in large organisations.		
		Tenderers must provide examples from the last five (5) years (2021–present) demonstrating delivery of expert-led engagements, such as: • keynote addresses; • masterclasses; • specialist training; • expert talks; or • large-group learning sessions. Each example must clearly demonstrate the following nine (9) elements: 1. what the expert delivered; 2. topic or theme of the session; 3. name of the organisation 4. organisation size (3 000+ employees); 5. number and/or type of participants (e.g. “300 leaders”); 6. delivery format (virtual, in-person, or hybrid); 7. content taught or explained; 8. how complex concepts were simplified for the audience; and 9. the expert's role and date of delivery.	• Seven (7) to nine (9) of the required elements clearly evidenced = 30 points • Five (5) to six (6) of the required elements clearly evidenced= 20 points • One (1) to four (4) of the required elements clearly evidenced= 10 points • No relevant examples provided = 0 points	30
		1.2 Number of large, complex organisations served		
		Tenderers must submit a list of organisations to which Functional Expertise services were delivered within the last five (5) years (2021–present). For each organisation, tenderers must clearly provide: • the organisation name (may be anonymised); • confirmation that the organisation employs 3 000 or more employees; • a brief description of organisational complexity (e.g. multiple divisions, geographic spread); and • a brief description of the type of Functional Expertise services	• Four or more (4+) qualifying organisations evidenced = 10 points • Three (3) qualifying organisations evidenced= 8 points • Two (2) qualifying organisations evidenced = 6 points • One (1) qualifying organisations evidenced= 4 points • Zero (0) organisations evidenced or Zero qualifying organisations = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		delivered (e.g. expert talks, masterclasses, specialist training). Each organisation will be counted once only, regardless of the number of engagements delivered to that organisation. Organisations for which size and complexity are not clearly stated will not be counted for scoring purposes.		
2	Audience Engagement & Expert Capability	2.1 Experience of proposed Functional Expert(s)		
	(Complete a summary of the tenderer's resources in schedule F.15, utilise the CV template in schedule F.19 and complete a declaration of resources availability in schedule F.20 in this tender)	Tenderers must submit Curriculum Vitae (CVs) for each proposed Functional Expert using the mandatory CV template. Each CV must clearly evidence the following: • Years of experience delivering expert-led content (e.g. keynotes, expert talks, masterclasses, specialist training); • Examples of expert-led engagements delivered within the last five (5) years (2021–present); • Experience delivering to large audiences, including senior leaders, managers, or enterprise-wide groups; and • Experience engaging different audience levels, demonstrating the ability to adapt content appropriately.	• 10 or more years of expert-delivery experience = 20 points • 7 - 9 years of expert-delivery experience = 15 points • 5 – 6 years of expert-delivery experience = 10 points • 3 – 4 years of expert-delivery experience = 5 points • 2 or less years of expert-delivery experience = 0 points Note: Years of experience” refers only to active experience delivering expert-led content as described above. Years must be clearly attributable to delivery roles (not preparation, advisory support only, or administrative roles). If years of experience are not clearly stated or evidenced, those years must not be counted.	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
3	Content Relevance to OE&I (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	3.1 Evidence of relevant OE&I specialist domains covered		
		Tenderers must show that their expert(s) have delivered content in one or more OE&I functional areas. Each domain counts when BOTH are provided: (1) a description of the topic or domain (2) at least one example demonstrating delivery of expert-led content in that domain. Recognised functional domains include: • Leadership practice • Organisational behaviour & culture • Coaching & mentoring • Business improvement • Organisational design • Innovation • Diversity & neurodiversity • Customer satisfaction • Ethics & governance • Strategy • Application of Artificial Intelligence within the work of managers and leaders • Workplace of the Future • Other related specialist areas aligned to the City of Cape Town	• Five (5) or more domains evidenced= 15 points • Four (4) domains evidenced= 10 points • Two (2) to three (3) domains evidenced = 5 points • One (1) domain evidenced = 2 points • No domains evidenced= 0 points	15
4	Clear methodology for delivering expert content (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	4.1 Methodology for delivering expert content		
		The tenderer must clearly explain all the following elements: 1. how complex concepts are simplified for different audiences; 2. how expert content is delivered virtually, in person, and in hybrid formats; 3. how audience engagement is maintained (for example, through activities, tools, or interaction); 4. how feedback is collected or session usefulness is assessed; and 5. examples of content customisation to organisational context, including at least one of the following:	• All five (5) elements evidenced = 15 points • Three (3) to four (4) elements evidenced = 10 points • Two (2) elements evidenced= 5 points • Zero (0) to one (1) element evidenced= 0 points	15

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		- o customised case studies; - o organisation-specific scenarios; or - o adapted tools or frameworks.		
5	Capacity to Support Delivery	a. Key Account Manager (KAM)		
		Tenderers must name a KAM responsible for all coordination and communication. CV must show experience with learning/engagement projects.	• Five (5) years or more experience = 5 points • 3 - 4 years' experience = 3 points • 2 or less years of experience = 0 points	5
		b. Ability to support large group sessions (e.g., 300+ participants)		
		Tenderers must show they have the administrative and logistical capability to support large-scale sessions. Evidence includes: ▪ event coordination capability ▪ in person event hosting capability ▪ venue sourcing ▪ virtual hosting capability ▪ scheduling and participant support.	• All five (5) elements evidenced = 5 points • Three (3) to four (4) elements evidenced = 3 points • One (1) to two (2) elements evidenced = 1 point • No evidence provided = 0 points	5
				Total 100

The minimum qualifying score for functionality is **70 points (70%)** out of a maximum of **100 points**.

PART D: EMPLOYEE AND LEADERSHIP - 360 DEGREE FEEDBACK TOOL

Tenderers MUST read this Part together with the Specifications in Section 5.
Failure to cross-reference may negatively affect scoring.

1. Purpose of Part D

Part D relates exclusively to the provision of a **360-degree feedback tool** for employees and leaders within the City of Cape Town.

This Part evaluates a tenderer's capability to **provide, configure, administer, and support** a structured 360-degree feedback solution that enables the City to gather **multi-source feedback** for individual and leadership development purposes.

Tender submissions under **Part D** will be evaluated based on the tenderer's ability to provide a **fit-for-purpose, user-friendly 360-degree feedback tool** suitable for deployment within a **large, complex organisation** such as the City of Cape Town.

Evidence submitted must relate specifically to the **design, content, usability, reporting, integration, and resourcing** of the 360-degree feedback tool. Evidence relating to leadership programme delivery or Organisational Development interventions will not be evaluated under this Part.

The focus of Part D is on the **measurement and feedback mechanism itself**, rather than leadership programme design, facilitation, or Organisational Development (OD) intervention delivery.

2. Scope of the 360-Degree Feedback Tool

The 360-degree feedback tool is intended to support:

- individual self-awareness and development;
- leadership insight across different leadership levels; and
- constructive feedback from multiple perspectives (for example, line managers, peers, direct reports, and self-assessment).

The tool may be utilised across **different organisational levels**, including employees, supervisors, managers and senior leaders, in line with the City's talent and leadership development processes.

3. Key Evaluation Focus

Part E evaluates the tenderer's capability to:

- provide a **credible, fit-for-purpose 360-degree feedback tool** suitable for use within a large, complex organisation;
- ensure **data integrity, confidentiality, and ethical use** of feedback information;
- support configurable feedback aligned to organisational or leadership frameworks provided by the City; and
- enable **actionable reporting** that supports individual insight and development planning.

a) Technical Experience: Design Foundation and Practical Usability of the 360-Degree Feedback Tool

This criterion assesses whether the proposed 360-degree feedback tool is:

- grounded in **sound theoretical principles**; and
- **practically usable** by employees and leaders across different leadership levels within a large organisation.

Tenderers should provide evidence demonstrating that the 360-degree feedback tool:

1. is based on **recognised leadership, behavioural, or psychological theory** relevant to 360-degree feedback;
2. is **easy to use**, with clear navigation, readable fonts, and an intuitive layout; and
3. is **easy to access and understand**, with clear instructions or in-system guidance and no requirement for specialised training.

b) Expertise: Content of the 360-Degree Feedback Tool

This criterion assesses whether the 360-degree feedback tool provides **meaningful, development-focused feedback** to employees and leaders.

Tenderers should provide evidence demonstrating that the 360-degree feedback tool:

- assesses **leadership competencies and behaviours**;
- captures feedback from **multiple sources** (for example self, peers, managers, and direct reports);
- clearly highlights **strengths and development areas**; and
- produces **reports that are clear, user-friendly, and appropriate to the City context**.

Each requirement is assessed on a **present or not present basis**. Points are awarded based on the number of requirements evidenced, in accordance with the scoring table.

c) Interpretability and Development Orientation of the 360-Degree Feedback Report

This criterion assesses whether employees receiving feedback can **understand and act on the results** without specialised support.

Tenderers should provide evidence demonstrating that the feedback reports:

- are structured so that employees can **easily interpret the results**;
- clearly explain strengths and development areas; and
- include, or are supported by, an **action-planning component** to guide development.

Points are awarded based on the number of elements evidenced.

d) Train-the-Trainer Capability

This criterion assesses whether the tenderer provides a train-the-trainer approach that enables City employees or nominated facilitators to support the effective use of the 360-degree feedback tool.

Tenderers should provide evidence of a train-the-trainer programme that includes:

1. Feedback training – how trainers will be trained to give, explain, and support 360-degree feedback, including the format of training;
2. Embedding learning over time – how learning from feedback will be reinforced after initial feedback; and
3. Supporting engagement with feedback outcomes – how participants will be supported to analyse reports and engage meaningfully with development outcomes.

Each element is assessed as **present or not present**, and points are awarded accordingly.

e) Integration with Organisational Effectiveness and Innovation (Leadership & Team Development, Coaching, Mentoring, Career, Talent Management)

This criterion assesses whether 360-degree feedback results are **practically integrated** into development processes.

Tenderers should provide evidence demonstrating how 360-degree feedback results are:

- interpreted; and
- explicitly linked to leadership development activities, coaching, mentoring, or other identified development interventions.
- Evidence must show **how feedback results inform or trigger development support**, not merely state that integration is intended.

Points are awarded based on whether full, partial, or no integration is evidenced.

f) Resourcing and Capability (see schedule F.19 for CV template)

This criterion assesses whether the tenderer has **sufficient, experienced project employees** to support implementation and ongoing use of the 360-degree feedback tool.

Availability of employees

Tenderers should provide evidence of the **number of employees** available to support implementation, administration, train-the-trainer delivery, and ongoing support. Evidence must include a list of employees and CVs submitted using the mandatory CV template.

Points are awarded based on the number of employees with relevant experience who are clearly evidenced.

Experience of Key Employees Responsible for Train-the-Trainer Delivery

Tenderers should provide evidence demonstrating the **years of relevant experience** of employees responsible for train-the-trainer delivery and feedback support. Experience must be clearly stated in years, attributable to named individuals, and relevant to feedback tools or train-the-trainer delivery.

Only experience explicitly evidenced in CVs may be scored. Where experience is unclear, the lowest applicable score must be applied.

4. Important Clarifications

- Part D focuses on the **tool, methodology, administration, and reporting** associated with 360-degree feedback, not on coaching, facilitation, or behavioural interventions following feedback.
- The 360-degree feedback tool must be suitable for deployment within a **large, complex organisational environment** comparable to the City of Cape Town (3 000+ employees, multiple business units, and geographic spread).
- All data collected and processed through the tool must comply with **POPIA** and relevant data protection requirements.

5. Intellectual Property and Data Ownership

All data, reports, and outputs generated through the use of the 360-degree feedback tool for the City of Cape Town shall remain the **property of the City of Cape Town**. The service provider may not use, disclose or repurpose City-specific data without the City's prior written consent.

Summary

Part D evaluates a tenderer's ability to provide a **theoretically sound, easy-to-use, and development-focused 360-degree feedback tool**, supported by credible integration and resourcing. All scoring is based strictly on the **criteria and point allocations set out in the Part D evaluation table**, and evidence must relate specifically to the 360-degree feedback tool and its implementation.

PART D: Employee and Leadership - 360 Degree Feedback tool

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
1	Technical Experience Development based on sound theoretical principles and content of the online 360 feedback survey and report User Accessibility and user friendliness of the system (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	Criteria: The programme is delivered 1. Using sound theoretical principles 2. It is engaging and easily understandable with clear navigable graphics with clear font 3. The ease of accessibility of an on-line system with clear instructions, easy to understand and access, or an online guiding system. a) High Usability (Easy for everyone to use) b) Low Cognitive Load (Not overwhelming or confusing) c) Reduced Administrative Burden for the City (Less work for employees) d) Inclusive Access Across Leadership Levels (Everyone can use it confidently) e) Inclusive Access Across Leadership Levels (Everyone can use it confidently)	The content is based on sound theoretical principles with clear, navigable graphics that are engaging with clear font, content and guidelines which is easily understood; easy to access and have clear instructions. Meets all 3 criteria applications = 25 points The content is mostly based on sound theoretical principles with clear and navigable graphics that are somewhat engaging with clear font and content which is mostly understandable and some guidelines provided; can access and has instructions. Meet 2 of the 3 criteria = 15 points The content is less theoretically sound with less clear and navigable graphics that are not engaging with unclear font and content which is not easily understandable and limited guidelines; not easily accessible and limited instructions that are not very clear e.g. too content heavy; Meet 1 of the 3 criteria = 10 points The content is not theoretically sound with no or unclear graphics that are not engaging with unclear font and content which is not understandable, system is difficult to navigate and no guidelines provided; not accessible and no clear instructions = 0 points	25
2	Expertise: The content of the 360-degree feedback tool	The proposal must include a 360-degree feedback tool which focuses on the assessment of leadership competencies and behaviours and requirements such as; 1. Highlight strengths and development areas in relation to these as assessed by self, peers, managers and subordinates/direct reports	The proposal reflects a 360-degree feedback tool which focuses on the assessment of leadership competencies and behaviours and meet all 3 requirements = 20 points The proposal reflects a 360-degree feedback tool which focuses on the assessment of leadership competencies and behaviours and only meet 2 of the requirements = 10 points	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	360 Feedback Report	2. The report should be customisable and bespoke in nature 3. With the potential to integrate with other tools The submission should meet the following requirements; 1. A user-friendly analysis and report which includes an assessment of leadership competencies and behaviours and 2. highlights strengths and development areas as well as 3. A proposed action plan 4. report includes the intuitive ability of the employee being assessed to understand the results.	The proposal reflects a 360-degree feedback tool which focuses on the assessment of leadership competencies and behaviours and only meet 1 of the requirements = 0 points The proposal includes all 4 requirements =15 points The proposal includes 3 of the requirements =10 points The proposal includes 2 of the requirements = 5 points The proposal includes one or none of the requirements = 0 points	15
	Train the Trainer (Complete a summary of the tenderer's resources in schedule F.15, the CV template in schedule F.19, and a declaration of resources availability in schedule F.20 in this tender)	The proposal includes: Evidence of a train-the-trainer approach that covers the following: 1. Feedback training and delivery format Clear explanation of how trainers will be trained to give, explain, and support 360-degree feedback, including the format of the training (for example, workshops, virtual sessions, or learning materials). 2. Embedding learning over time Clear explanation of how learning from the 360-degree feedback will be reinforced or embedded after initial feedback (for example, follow-up activities, reflection, or development	The proposal includes details of a train the trainer programme which covers feedback training, how learning will be embedded and supporting engagement with feedback outcomes, all 3 elements of the train the trainer approach = 10 points The proposal includes some details of a train the trainer programme and covers some aspects of feedback training as well as analysis of 360 reports. 2 elements are covered in the proposal= 5 points. The proposal offers one (1) or zero (0) indication of the elements of a train the trainer approach including feedback training or report analysis = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Integration with leadership development programmes as well as mentoring and coaching programmes	planning). 3. Supporting engagement with feedback outcomes Clear explanation of how participants will be supported to engage meaningfully with feedback results and use them to inform ongoing development actions. Each item must be clearly demonstrated in the proposal. Items are assessed on a present / not present basis only. Tenderer provides clear evidence showing how 360-degree feedback results are: 1. interpreted, and 2. explicitly linked to one or more of the following four support mechanisms: ○ leadership development activities, ○ coaching interventions, ○ mentoring programmes, and/or ○ other clearly identified development interventions that support an employee in addressing feedback-identified development areas. Evidence must describe how feedback results inform or trigger development support, not merely state that integration is intended. Integration is considered effective if 360 feedback results are interpreted and correctly linked to leadership development as well as coaching and mentoring programmes or any other identified interventions to support the employee in	Evidence submitted supports full integration between 360 feedback and leadership, coaching and mentoring programmes; all 4 support mechanisms =10 points Integration between 360 feedback and leadership, coaching and mentoring programmes attempted; 3 of the support mechanisms present =5 points Integration between 360 feedback and leadership, coaching and mentoring programmes with 2 or less of the support mechanisms present = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		addressing development outcomes		
3	Resourcing and capability Availability and experience of employees for City of Cape Town 360-degree feedback tool (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	The tenderer should provide evidence of the number of support employees who are readily available to support the City of Cape Town's 360-degree feedback tool, including implementation, administration, train-the-trainer delivery, and ongoing support. Evidence must include: - a list of proposed project-based employees; and - Curriculum Vitae (CVs) submitted using the mandatory CV template, confirming relevant experience with 360-degree feedback tools or similar systems. Only employees explicitly named and evidenced may be counted.	More than 6 employees with relevant experience = 10 points 4-5 employees with relevant experience = 8 points 2-3 employees with relevant experience = 6 points Less than 2 employees with relevant experience = 0 points	10
	Years of experience of key employees responsible for train the trainer (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	The tenderer should provide evidence demonstrating the years of relevant experience of key employees responsible for train-the-trainer delivery, supported by Curriculum Vitae (CVs submitted using the mandatory CV template). Experience must be: - clearly stated in years; - attributable to named employees; and - directly related to train-the-trainer delivery, feedback training, or support of 360-degree feedback processes. General employment experience or unrelated training experience must not be counted. Only experience explicitly evidenced in CVs may be scored. Where experience spans multiple roles, evaluators must count only the years relevant to train-the-trainer or feedback-related delivery. If years of experience are	More than 9 years' experience = 10 points More than 5 and up to 9 years' experience = 7 points More than 3 and up to 5 years' experience = 5 points Less than 3 years' experience = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		unclear, the lowest applicable score must be applied. Employees may include professional advisory, analytical, system, reporting, account management, and support roles, provided the tenderer demonstrates adequate capacity and relevant experience through the submitted evidence.		
				Total 100

The minimum qualifying score for functionality is **70 points (70%)** out of a maximum of **100 points**.

PART E: CHANGE MANAGEMENT, CHANGE LEADERSHIP CAPABILITY AND ESTABLISHING A CHANGE NETWORK

The tenderer must demonstrate strong capability in delivering end-to-end change management programmes, facilitating change leadership development, and establishing a change network at an enterprise level.

For **change management**, this includes proven experience implementing comprehensive change management programmes across people, process, technology, and operating model initiatives using proven change management methodologies.

From a **change leadership development** perspective, this includes designing and facilitating change leadership programmes that build capability across all levels of the business and equips leaders to drive and sustain change.

In addition, **establishing and mobilising effective change networks** through the identification and nomination of change champions and agents, the development of role profiles, onboarding and enablement of network members, and the creation of active communities of practice that support adoption and reinforcement of organisational change. Such programmes must have been provided over the last 5 years (2021 - present).

1. Experience:

Tenderers must clearly demonstrate, across all three areas of change management, change leadership development, and change network establishment, **the scale and complexity of the work** they have delivered. This includes specifying:

- the number and diversity of stakeholder groups involved,
- the levels of organisational seniority engaged, and
- the outcomes achieved through each intervention.

Tenderers must also describe the **complexity of the work** undertaken in each area, as well as the **duration and time taken** to reach those outcomes. When presenting this information, tenderers must consider **work completed in organisations of similar size and complexity to the City of Cape Town**, large, multi-faceted entities, considering organisational size, the volume and diversity of stakeholders, internal and external stakeholder impacts, and the number of different business lines affected.

2. Expertise:

Service providers must demonstrate the full range of change management and change leadership capabilities through evidence of high-quality artefacts and methods used in previous programmes.

- **For change management**, this includes providing examples of comprehensive rollout artefacts such as impact and readiness assessments, change strategies, integrated change plans, stakeholder and communications plans, training and resistance management plans, as well as supporting tools such as leadership packs, toolkits, FAQs, cheat sheets, training materials, change playbooks, and reinforcement activities. Tenderers must also show how the success of these programmes was measured using both quantitative and qualitative methods, with clear indicators of adoption, utilisation, and behaviour change achieved.

- **For change leadership**, tenderers must present evidence of programmes they have designed and facilitated for different leadership levels, Executive Directors, Senior Managers, and Middle Management, supported by content outlines, learning objectives, and materials such as playbooks, sponsor roadmaps, simulations, and coaching tools. Submissions must further demonstrate creativity and innovation, such as behavioural science techniques, cohort-based approaches, or methods for observing behaviour change, as well as indicate programme duration, delivery format, and measurable evidence of programme effectiveness.
- **For the establishment of a change network**, tenderers must demonstrate previously implementing effective change networks, including champions and agents. This includes capability building and support tools used to equip change champions and agents and governance structures and reporting methods used to track change network feedback and performance.

3. Resources:

Availability of Senior Change Managers, Change Managers, Senior Change Analysts, Change Analysts, Senior Communication Managers, Communication Managers, Engagement Managers and Facilitator resources. **(See schedule F.19 for CV template to be completed)**

Part E: Change Management, Change Leadership Capability and Establishing a Change network

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
1	Experience - Change Management programmes completed in the last 5 years Examples of change management programmes that have been completed having progressed through the full change cycle including details of such programmes in large organisations of the same size and complexity as the CCT (a multi-faceted organisation of 6 000 or more employees) (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	The following require examples of projects completed over the last 5 years (2021 - present). The tenderer's experience must cover: 1.1 Change Management: 1.1.1 Rolling out Change Management programmes that are transitional in nature. These transitional changes entail a planned change from the current to a new state (i.e. AS-IS to TO-BE), follows a structured approach which is managed with standard project timelines, outcomes are predetermined and implementation follows a short to medium period (e.g. 6 months to 24 months). Examples of such transitional changes are: 1.1.1.1 Operating Model changes 1.1.1.2 Business Improvement changes 1.1.1.3 Process changes 1.1.1.4 Technology changes 1.1.1.5 People-related changes 1.1.2 The Change Management programme is delivered using change methodology which includes	The tenderer has outlined their experience in change management in large organisations as per the 5 guidelines for criteria application (1.1.1 – 1.1.5) = 20 points The tenderer has outlined their experience in change management in large organisations but omitted at least one of the criteria as per the guidelines for criteria application (1.1.1 – 1.1.5) = 15 points The tenderer has outlined their experience in change management in large organisations but omitted at least two of the criteria as per the guidelines for criteria application (1.1.1 – 1.1.5) = 10 points The tenderer has outlined their experience in change management in large organisations but omitted at least three of the criteria as per the guidelines for criteria application (1.1.1 – 1.1.5) = 5 points The tenderer has outlined their experience in	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Experience - Change Leadership Development programmes completed in the last 5 years Examples of change leadership programmes that have been completed including details of such programmes in large organisations of the same size and complexity as the CCT (a multi-faceted organisation of 6 000 or more employees) (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	proven change management industry recognized methodologies. Examples include, but not limited to those listed below: 1.1.2.1 PROSCI Change Methodology 1.1.2.2 ADKAR Change model 1.1.2.3 Change Leader's Roadmap 1.1.2.4 Kotter's 8 Step Model 1.1.3 Examples of any change management tools (e.g. change readiness assessments, change impact assessments, etc) and change management presentations used to equip leaders, managers and employees during the change journey 1.1.4 The time period of the change management programmes delivered including an example of an integrated project-change management plan used to guide and deliver the change 1.1.5 Reports and/or presentations delivered with relevant supporting information 1.2. Change Leadership Development: 1.2.1 Facilitation methodology used in change leadership development programmes 1.2.2 Content development approach used for purposes of facilitating change leadership programmes 1.2.3 Examples of any assessments, coaching or tools used as part of change leadership programmes 1.2.4 The time period of the change leadership programmes including an	change management in large organisations but omitted at least four or more of the criteria as per the guidelines for criteria application (1.1.1 – 1.1.5) = 0 points The tenderer has outlined their experience in change management in large organisations as per the guidelines for criteria application (1.2.1 – 1.2.6) = 20 points The tenderer has outlined their experience in change management in large organisations but omitted at least one of the criteria as per the guidelines for criteria application (1.2.1 – 1.2.6) = 15 points The tenderer has outlined their experience in change management in	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Experience - Change Networks established in the last 5 years Examples of Change Networks established including details of this in large organisations of the same size and complexity as the CCT (a multi-faceted organisation of 6 000 or more employees) (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	example of a past completed project plan 1.2.5 Preferred format of instilling learning e.g. case studies and scenarios, practical learning 1.2.6 Reports and/or presentations delivered with relevant supporting information 1.3. Establishing a Change Network 1.3.1 Establishment of a change network (i.e. change champions and change agents) which include working alongside key business stakeholders to do the following: 1.3.1.1. Identify and nominate a change network for a specific project or across the business 1.3.1.2 Onboarding of change network 1.3.1.3 Training and enablement of change network 1.3.1.4 Establishing communities of practice 1.3.1.5 Rolling out train-the-trainer to ensure the enablement and sustainability of change	large organisations but omitted at least two of the criteria as per the guidelines for criteria application (1.2.1 – 1.2.6) = 10 points The tenderer has outlined their experience in change management in large organisations but omitted at least three or more of the criteria as per the guidelines for criteria application (1.2.1 – 1.2.6) = 5 points The tenderer did not outline their experience in change management in large organisations as per (1.2.1 – 1.2.6) = 0 points The tenderer has outlined their experience in change management in large organisations as per the guidelines for criteria application (1.3.1.1 – 1.3.1.5) = 20 points The tenderer has outlined their experience in change management in large organisations but omitted at least one of the criteria as per the guidelines for criteria application (1.3.1.1 – 1.3.1.5) = 15 points The tenderer has outlined their experience in change management in large organisations but omitted at least two of the criteria as per the guidelines for criteria application (1.3.1.1 – 1.3.1.5) = 10 points The tenderer has outlined their experience in change management in large organisations but omitted at least three or more of the criteria as per the guidelines for criteria application (1.3.1.1 – 1.3.1.5) = 5	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	The proposal provides details of the nature, size, scope and complexity of Change Management programmes rolled out (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	1.4 For Change Management, specific to carrying out transitional change, this must include details pertaining to the: 1.4.1 Number of stakeholders / extent of the differentiation stakeholder groups involved 1.4.2 Level of stakeholders in terms of organisational seniority 1.4.3 Outcomes achieved pertaining to Change Management work 1.4.4 Complexity of work 1.4.5 Time taken to reach outcomes	points The tenderer did not outline their experience in change management in large organisations = 0 points The proposal addresses all the <u>details</u> (1 – 5) of the change management programmes as per the guidelines for criteria application (1.4.1 – 1.4.5) = 20 points The proposal addresses the details of the change management programmes but omitted 1 – 2 of the guidelines for criteria application (1.4.1 – 1.4.5) = 15 points The proposal addresses the <u>details</u> of the change management programmes but omitted at least 3 of the guidelines for criteria application (1.4.1 – 1.4.5) = 10 points The proposal addresses the <u>details</u> of the change management programmes but omitted more than 3 of the guidelines for criteria application (1.4.1 – 1.4.5) = 5 points The proposal confirms no <u>details</u> of the change management programmes = 0 points	20
	The proposal provides details of the nature, size, scope and complexity of Change Leadership Development programmes rolled out (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	1.5 For Change Leadership Development, this must include details pertaining to the: 1.5.1 Number of stakeholders / extent of the differentiation in stakeholder groups involved 1.5.2 Level of stakeholders in terms of	The proposal addresses all the <u>details</u> (1 – 5) of the change leadership development programmes guidelines for criteria application (1.5.1 – 1.5.5) = 20 points The proposal addresses the <u>details</u> of the change leadership development programmes but omitted	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	The proposal provides details of the nature, size, scope and complexity of Change Networks rolled out (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	organisational seniority 1.5.3 Outcomes achieved pertaining to Change Leadership Development programmes 1.5.4 Complexity of work 1.5.5 Time taken to reach outcomes 1.6 For establishing a Change Network, this must include details pertaining to the: 1.6.1 Number of stakeholders / extent of the differentiation in stakeholder groups involved 1.6.2 Level of stakeholders in terms of organisational seniority 1.6.3 Outcomes achieved pertaining to establishing a Change Network 1.6.4 Complexity of work 1.6.5 Time taken to reach outcomes	1 – 2 of the guidelines for criteria application (1.5.1 – 1.5.5) = 15 points The proposal addresses the <u>details</u> of the change leadership development programmes but omitted at least 3 of the guidelines for criteria application (1.5.1 – 1.5.5) = 10 points The proposal addresses the <u>details</u> of the change leadership development programmes but omitted more than 3 of the guidelines for criteria application (1.5.1 – 1.5.5) = 5 points The proposal confirms no details of the change leadership development programmes guidelines for criteria application (1.5.1 – 1.5.5) = 0 points The proposal addresses all the details (1 – 5) of the establishment of a change network (1.6.1 – 1.6.5) = 20 points The proposal addresses the <u>details</u> of the establishment of a change network but omitted 1 – 2 of the details (1.6.1 – 1.6.5) = 15 points The proposal addresses the <u>details</u> of the establishment of a change network but omitted at least 3 of the details (1.6.1 – 1.6.5) = 10 points The proposal addresses the <u>details</u> of the establishment of a change network but omitted more than 3 of the details (1.6.1 – 1.6.5) = 5 points The proposal confirms no details of the	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Complexity and Scale of organisations in which Change Management programmes were delivered (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	1.7 For Change Management programmes, specific for carrying out transitional change with due consideration of the organisations of same size and complexity to CCT, consider: 1.7.1 Size of the company/organisation, 1.7.2 Number of stakeholders involved 1.7.3 Internal and external stakeholder impacts 1.7.4 Number of different lines of business impacted	establishment of a change network = 0 points Change Management Programmes included more than 6 organisations of the same size and complexity as the CCT = 10 points Change Management Programmes included 4-6 organisations of the same size and complexity as the CCT = 5 points Change Management Programmes included 1-3 organisations of the same size and complexity as the CCT = 3 points Change Management Programmes included 0 organisations of the same size and complexity as the CCT = 0 points	10
	Complexity and Scale of organisations in which Change Leadership Development programmes were delivered (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	1.8 For Change Leadership Development, with due consideration of the organisations of same size and complexity to CCT, consider: 1.8.1 Size of the company/organisation, 1.8.2 Number of stakeholders involved 1.8.3 Internal and external stakeholder impacts 1.8.4 Number of different lines of business impacted	Change Leadership Development Programmes included more than 6 organisations of the same size and complexity as the CCT = 10 points Change Leadership Development Programmes included 4-6 organisations of the same size and complexity as the CCT = 5 points Change Leadership Development Programmes included 1-3 organisations of the same size and complexity as the CCT = 3 points Change Leadership Development Programmes included 0 organisations of the same size and complexity as the CCT = 0 points	10
	Complexity and Scale of organisations in which Change Networks were	1.9 For establishing Change Networks, with due consideration of the	Establishment of Change Networks included more than 6 organisations of	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	established (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	organisations of same size and complexity to CCT, consider: 1.9.1 Size of the company/organisation, 1.9.2 Number of stakeholders involved 1.9.3 Internal and external stakeholder impacts 1.9.4 Number of different lines of business impacted	the same size and complexity as the CCT = 10 points Establishment of Change Networks included 4-6 organisations of the same size and complexity as the CCT = 5 points Establishment of Change Networks included 1-3 organisations of the same size and complexity as the CCT = 3 points Establishment of Change Networks included 0 organisations of the same size and complexity as the CCT = 0 points	
2	Expertise: Change Management Programmes completed in the last 5 years The proposal must provide details of demonstrated expertise in rolling out Change Management programmes (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	2.1 Change Management programmes to include: Outlining Change Management programmes that are transitional in nature. These transitional changes entail a planned change from the current to a new state (i.e. AS-IS to TO-BE), follows a structured approach which is managed with standard project timelines, outcomes are predetermined and implementation follows a short to medium period (e.g 6 months to 24 months). 2.1.1 Further to this, evidence and artefacts of Change Management rollouts which include: 2.1.1.1 Change scoping 2.1.1.2 Change mapping 2.1.1.3 Change Impact Assessments 2.1.1.4 Change Readiness Assessments 2.1.1.5 Change Strategy 2.1.1.6 Integrated Project-Change Plans 2.1.1.7 Stakeholder Plans 2.1.1.8 Communications Plans 2.1.1.9 Training Plans 2.1.1.10 Change Risks 2.1.1.11 Resistance Management Plans 2.1.1.12 Leadership change packs 2.1.1.13 Leadership toolkits	The tenderer has outlined their expertise in change management programmes, as per the guidelines for criteria application (2.1) = 20 points The tenderer has outlined their expertise in change management programmes, but omitted at least two of the criteria as per the guidelines for criteria application (2.1) =15 points The tenderer has outlined their expertise in change management, but omitted at least three or more of the criteria as per the guidelines for criteria application (2.1) = 10 points The tenderer did not outline their expertise in change management, as per the guidelines for criteria application (2.1) = 0 points Evidence of methods (quantitative and qualitative) used to determine how the success of change has	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Expertise: Change Leadership Development programmes completed in the last 5 years The proposal must provide details of demonstrated expertise in rolling out Change Leadership Development programmes (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	2.1.1.14 FAQs 2.1.1.15 Cheat Sheets 2.1.1.16 Training Material 2.1.1.17 Change playbooks and reinforcement of change activities. 2.2 Change Leadership: 2.2.1 Evidence of programmes produced and facilitated, indicating levels of leadership trained (e.g., Executive Directors, Senior Managers and Middle Management). 2.2.2 Evidence of content outlines and learning objectives; materials/tools used (e.g., playbooks, sponsor roadmaps, simulations, coaching). 2.2.3 Evidence of creativity & innovation applied at different levels (e.g., behavioural science assessments, cohort communities, measurement of behaviour change). 2.2.4 Evidence of programme duration and delivery formats (virtual/in-person/blended). 2.2.5 Evidence of effectiveness (e.g. application evidence, pulse results, behavioural indicators)	been measured with a focus on adoption rates, utilisation and behaviour change that has shifted. The tenderer has outlined their expertise in change leadership development, as per the guidelines for criteria application (2.2) = 20 points The tenderer has outlined their expertise in change leadership development, but omitted at least two of the criteria as per the guidelines for criteria application (2.2) =15 points The tenderer has outlined their expertise in change leadership development, but omitted at least three or more of the criteria as per the guidelines for criteria application (2.2) = 10 points The tenderer did not outline their expertise in change leadership development, as per the guidelines for criteria application (2.2) = 0 points	20
	Expertise: Establishment of a Change Network in the last 5 years The proposal must provide details of demonstrated expertise in establishing a Change Network (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	2.3. Change Network 2.3.1 Evidence of previously implementing effective change networks, including champions and agents. 2.3.2 Evidence of a clear, practical methodology for establishing and managing a change network. 2.3.3 Evidence of capability building and support tools used to equip change champions and agents. 2.3.4 Evidence of governance structures and reporting methods used to track network performance.	The tenderer has outlined their expertise in establishing a change network, as per the guidelines for criteria application (2.3) = 20 points The tenderer has outlined their expertise in establishing a change network, but omitted at least two of the criteria as per the guidelines for criteria application (2.3) =15 points The tenderer has outlined their expertise in establishing a change	20

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
			network, but omitted at least three or more of the criteria as per the guidelines for criteria application (2.3) = 10 points The tenderer did not outline their expertise in establishing a change network, as per the guidelines for criteria application (2.3) = 0 points	
3	Resources Availability of Change Management resources (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender) Availability of Change Leadership Development and establishing a Change Network resources (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Number of various Change Management resources which include the following: • Senior Change Manager • Change Manager • Senior Change Analyst • Change Analysts • Senior Communications Manager • Communications Manager • Engagement Manager • Facilitator Number of Facilitators readily available to support change leadership development and establishment of a change network for the City	Five or more Change management experienced resources = 10 points Less than 5 Change management experienced resources = 5 points No ready access to Change management experienced resources = 0 points More than 10 Facilitators = 10 points 6-9 Facilitators = 7 points 4-5 Facilitators = 5 points Up to 3 Facilitators = 0 points	10 10
				Total 230

The minimum qualifying score for functionality is **161 points (70%)** out of a maximum of **230 points**.

PART F: PROFESSIONAL SERVICES FOR TALENT MANAGEMENT AND DEVELOPMENTAL ASSESSMENTS

The tenderers must be able to provide **qualified resources**, namely a **Senior Talent Management Consultant, Talent Management Consultant, Organisational Psychologist, and Account Manager**, specialising in the field of implementation of Workforce Planning and Talent Strategy initiatives, including Succession Planning, Employer Branding, Talent Development, Assessment processes, and Career Management.

The **specific focus of these resources** must include demonstrated experience in:

- **Talent Management Strategy & Programmes:** Designing and delivering integrated Talent Management strategies aligned to organisational objectives, ensuring a cohesive approach across workforce planning, capability building, and long-term talent sustainability.

- **Workforce Planning & Talent Strategy:** Enabling organisations to anticipate future talent needs through data-driven workforce planning, skills forecasting, and aligned talent strategies that support business continuity and growth.
- **Succession Planning:** Developing structured succession planning frameworks to identify, assess, and prepare high-potential talent for critical and leadership roles, strengthening organisational resilience and leadership pipelines.
- **Employer Branding:** Creating and enhancing employer value propositions that attract, engage, and retain top talent, while strengthening the organisation's reputation as an employer of choice.
- **Talent Development:** Designing targeted talent development programmes that build critical capabilities, accelerate leadership readiness, and support continuous learning and performance improvement.
- **Assessment Processes:** Designing and implementing robust, fair, and evidence-based assessment processes to support talent identification, development decisions, and succession readiness.
- **Career Management:** Establishing career management frameworks that support transparent career progression pathways, employee mobility, and engagement, while aligning individual aspirations with organisational needs.

1. Experience

The tenderer must demonstrate **relevant experience over the past five (5) years (2021 to present) in providing resources and capacity to facilitate and implement** Workforce Planning and Talent Strategy initiatives, including Succession Planning, Employer Branding, Talent Development, Assessment processes, and Career Management, **within large, complex organisations employing 1,000 or more employees.**

Evidence of this experience must be clearly and comprehensively **detailed in the company profile and, for each relevant assignment, must include** the following:

- the name of the client,
- the nature of the client's business,
- the approximate size of the organisation;
- a description of the project scope, including the specific talent management assignments undertaken (such as workforce planning, succession planning, talent reviews, development programmes, assessments, and career management initiatives);
- details of the resources deployed, including the number and type of resources utilised (e.g. consultants, specialists, facilitators, and project managers); and
- the duration of the assignment, specifying the start and end dates.

CVs (as per the template provided in schedule F.19 of this tender) of the proposed Senior Talent Management Consultant, Talent Management Consultant, Organisational Psychologist, and Account Manager **must clearly demonstrate the number of years of relevant professional experience, as well as successful completion of comparable assignments** in Talent Management, Workforce Planning, Succession Planning, Employer Branding, Talent Development, and Career Management.

The proposed Organisational Psychologist must be registered with the HPCSA as an Industrial / Organisational Psychologist and must have a minimum of two (2) years' relevant experience, including demonstrated experience in integrating developmental assessments within Talent Management frameworks. Proof of registration with the HPCSA must be included with the CV of the resource.

This requirement aligns directly with the scoring criteria, which allocate higher points for:

- A greater number of relevant and comparable assignments; and
- Higher years of relevant professional experience.

2. Resources and Capacity

Provide details of the **number and qualifications of consultants and support employees available** to deliver this service. This includes the **Senior - and Talent Management Consultants** responsible for facilitation of talent management initiatives, the **Organisational Psychologist** responsible for assessments, and the **Account Manager** responsible for client liaison, coordination and quality assurance. Scoring will consider the availability and adequacy (experience) of these resources to meet the City's requirements (as indicated in the functionality evaluation table).

3. Expertise and Technical Approach

Provide detailed information outlining the consultants' **technical expertise and practical experience** against the criteria specified in the evaluation table, including **demonstrated capability** in the following areas:

- Facilitating **Talent Management, Career Management, and Succession Planning** processes
- Enabling the effective utilisation of **Talent Profiles** within a talent management system
- **Developing training materials and delivering capacity-building interventions** on the Talent 9-Box Grid methodology
- **Applying developmental assessments** and profiling methodologies for top or critical talent
- **Conducting succession planning processes** and **evaluating talent readiness**
- **Supporting Talent Strategy and Workforce Planning** initiatives
- **Applying Organisational Development principles** to leadership and talent placement to ensure alignment across roles, teams, business units, and organisational objectives

Tenderers will be scored based on the extent to which their proposed team demonstrates competence across all these areas. For further clarification, the following offers more details:

- **Facilitation, guidance and advice on Talent information** including preparation, facilitation, and documentation of talent data and analytics.
- **Development of Talent Profiles** includes the compilation and update of employee Talent Profiles including performance / potential nine-box talent placement, readiness indicators, career aspirations, and proposed next career move.
- **Preparation of, Talent data**, and development summaries into packs for use Manager talent discussions.
- **Training Workshop for OD/HR employees** include training on Talent discussions / facilitation and Talent Engagement
- **Develop Training material to Workshop with Line Managers** include training on Talent and Career Engagement
- **Integrated Talent Development Assessment** includes the administration and scoring of behavioural and potential assessments to evaluate employee learning potential, and development needs as part of the Talent Management process.
- **Generation of Individual Interpretive *in-depth* reports** includes individual profile / preferencing reports (this includes the cost of an online personality assessment)
- **Generation of Individual Interpretive *basic* reports** includes individual profile / preferencing reports (this includes the cost of an online personality assessment)
- **Line Manager Report** includes a summary of each employee's key strengths, areas for growth, development needs, and potential leadership style to support CCT succession and career discussions.
- **Development of Individual Succession Profiles** includes the integration of assessment data and readiness indicators
- **Consolidated Talent Insights and Successor Readiness Report** (organisation-wide) include integrated reporting on talent indicators and successor capacity and capability
- **Digital Enablement** includes access and use of Talent Management / Assessment tool to capture profiles, include manager input, and generate individual or team Talent reports

4. Digital Enablement (Talent Management and Assessment Tools)

The Tenderer must **demonstrate the ability to use, or have secure access to, a Talent Management and Developmental Assessment platform or system that is fully embedded** within the consulting methodology and not utilised as a standalone solution, system only solution.

The platform or system must **provide online, digital, electronic or system-based support to the City's Talent Management programmes** and must be actively used during service delivery. Whether **owned, licensed, or accessed through the service providers third-party supplier, the platform must**

- **support the electronic creation, updating, and ongoing maintenance** of individual Talent Profiles;
- **capture, tracking, and consolidation of manager feedback**, including employee development needs, critical or scarce skills indicators, and flight-risk indicators; and
- the identification and tracking of successors for critical roles, including readiness levels and associated development actions.

It must further **enable consolidated talent views and reporting** to support Talent Review discussions, calibration processes, and governance forums; translate identified development needs into structured

personal and career development plans; and generate development-focused learning recommendations linked to assessment outcomes, competency gaps, career progression pathways, and development plans.

The platform must also support the **analysis and application of talent data** to inform Talent Management, talent development, and succession planning decisions, and provide role-based access controls to ensure appropriate visibility and management of Talent information in line with governance and data-protection requirements.

In addition, the platform or system must **support the administration and reporting of developmental assessments**, including the generation of standardised developmental assessment reports and actionable talent insights that do not require interpretation by an Industrial/Organisational Psychologist.

The platform **must enable the export of data in CSV format or other editable data sets** and **allow for the secure import of City-owned talent, workforce, and assessment data** into the digital solution to support reporting, analysis, and ongoing Talent Management activities.

Part F: Professional Services for Talent Management and Developmental Assessments

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
1	Experience Confirmation of experience as a company in providing Talent Management Consultants for facilitation and implementation of Talent Management, Succession Planning, and Assessment services for Talent development in large multi-faceted organisations of more than 1000 employees. (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	The tenderer must demonstrate relevant experience over the past five (5) years (2021 to present) in providing resources and capacity to facilitate and implement Workforce Planning and Talent Strategy initiatives, including Succession Planning, Employer Branding, Talent Development, Assessment processes, and Career Management, within large, complex organisations employing 1,000 or more employees. *Evidence of this experience must be clearly and comprehensively reflected in the company profile and must include the following details for each relevant Talent Management assignment: <u>Client Information</u> • Name of the client • Nature of the client's business • Approximate employee size of the organisation <u>Scope of Work</u> • Description of the project scope • Type of talent management assignments undertaken (e.g. workforce planning,	The tenderer has demonstrated relevant experience, based on the *evidence, by providing details of at least five (5) Talent Management assignments, within a multi-faceted organisations of more than 1000 employees in the past 5 years = 30 points The tenderer has demonstrated relevant experience, based on the *evidence, by providing details of at least four (4) Talent Management assignments, within a multi-faceted organisations of more than 1000 employees in the past 5 years = 25 points The tenderer has demonstrated relevant experience, based on the *evidence, by providing details of at least three (3) Talent Management assignments within multi-faceted organisations employing more than 1,000 employees over the past five (5) years. = 20 points	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		succession planning, talent reviews, development programmes, assessments, career management initiatives) <u>Resources Deployed</u> - Number of resources allocated to the assignment - Type of resources (e.g. consultants, specialists, facilitators, project managers) <u>Project Duration</u> - Start and end dates of the assignment	The tenderer has demonstrated relevant experience, based on the *evidence, by providing details of at least two (2) Talent Management assignments within multi-faceted organisations employing more than 1,000 employees over the past five (5) years. = 15 points The tenderer has demonstrated limited relevant experience, based on the *evidence, by providing details of one (1) Talent Management assignment within a multi-faceted organisation employing more than 1,000 employees over the past five (5) years. = 10 points The tenderer has not provided details of any relevant Talent Management assignments within multi-faceted organisations employing more than 1,000 employees over the past five (5) years. = 0 points	
2	Resources (30) Availability of Senior Talent Management Consultants, Talent Management Consultants, Organisational Psychologists, and Account Managers with relevant experience and capacity to deliver the required services. (Complete a summary of the tenderer's resources in	Number of consultants available meeting the required experience as per the requirements stipulated	Six (6) or more qualified consultants available = 10 points Four (4) to Five (5) qualified consultants available = 7 points Two (2) to three (3) suitably qualified consultants available = 4 points One (1) suitably qualified consultant available = 2 points No suitably qualified consultants available = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	schedule F.15, the CV template for each resource in schedule F.19 and a declaration of resources availability in schedule F.20 in this tender) Individual Senior Talent Management Consultants' relevant years of experience (Must be confirmed in CVs, demonstrating leadership in facilitation, succession planning, and talent strategy implementation) (Complete a summary of the tenderer's resources in schedule F.15, the CV template for each resource in schedule F.19 and a declaration of resources availability in schedule F.20 in this tender)	Has demonstrated experience as a Senior Talent Management Consultant in leading and developing Talent Management strategies and programmes across Workforce Planning and Talent Strategy, including Succession Planning, Employer Branding, Talent Development, assessment processes, and Career Management.	More than nine (9) years' senior leadership-level experience = 5 points Six (6) to nine (9) years' senior leadership-level experience = 4 points Four (4) or more but less than six (6) senior leadership-level experience = 3 points Two (2) or more years but less than four (4) senior leadership-level experience = 2 points Less than Two (2) years' senior leadership-level experience = 0 points	5
	Individual Talent Management Consultants' relevant years of experience (Must be confirmed in CVs, indicating roles, responsibilities, and work completed) (Complete a summary of the tenderer's resources in schedule F.15, the CV template for each resource in schedule F.19 and a declaration of	Have experience as a Talent Management Consultant in providing guidance, advice on Talent Management strategies and programmes across Workforce Planning and Talent Strategy, including Succession Planning, Employer Branding, Employee Value Proposition, Talent Development, assessment processes, and Career Management	More than nine (9) years' experience = 5 points Six (6) to nine (9) years' experience = 4 points Four (4) or more but less than six (6) years' experience = 3 points Two (2) or more years but less than four (4) years' experience = 2 points Less than two (2) years' experience = 0 points	5

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	resources availability in schedule F.20 in this tender) Individual Organisational Psychologist's relevant experience (Must be confirmed in CVs, with evidence of registration with HPCSA and experience in developmental and leadership assessments) (Complete a summary of the tenderer's resources in schedule F.15, the CV template for each resource in schedule F.19 and a declaration of resources availability in schedule F.20 in this tender)	Have experience as an Organisational Psychologist in conducting developmental and leadership potential assessments, interpreting psychometric and behavioural data, and providing feedback and advisory support to inform Talent Development and Succession Planning decisions.	More than nine (9) years' experience = 5 points Six (6) to nine (9) years' experience = 4 points Four (4) or more but less than six (6) years' experience = 3 points Two (2) or more years but less than four (4) years' experience = 2 points Less than two (2) years' experience = 0 points	5
	Individual Account Manager Consultants' relevant years of experience (Must be confirmed in CVs, indicating roles, responsibilities, and work completed) (Complete a summary of the tenderer's resources in schedule F.15, the CV template for each resource in schedule F.19 and a declaration of resources availability in schedule F.20 in this tender)	Have experience in overseeing client accounts or programmes, ensuring effective project governance, stakeholder communication, quality assurance, and alignment of deliverables with contractual and service standards.	More than nine (9) years' experience = 5 points Six (6) to nine (9) years' experience = 4 points Four (4) or more but less than six (6) years' experience = 3 points Two (2) or more years but less than four (4) years' experience = 2 points Less than two (2) years' experience = 0 points	5

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
3	Expertise As per the CVs of the Senior Talent Management consultants/ Talent Management Consultants / Organisational Psychologists proposed for this tender (Complete a summary of the tenderer's resources in schedule F.15, the CV template for each resource in schedule F.19 and a declaration of resources availability in schedule F.20 in this tender)	Criteria points for Talent Management and Assessment expertise: 1. Facilitation of Talent Management, Career Management and Succession Planning processes. 2. Enabling effective use of Talent Profiles within the talent management system. 3. Development of training material and delivery of capacity building on the Talent 9-Box Grid. 4. Application of developmental assessments and profiling for top or critical talent. 5. Conducting succession planning activities and evaluating readiness. 6. Supporting Talent Strategy and Workforce Planning initiatives. 7. Applying Organisational Development principles to leadership and talent placement to ensure alignment with role, team, business, and organisational needs.	Consultants demonstrate relevant expertise and experience gained over the past 5 years in large, multi-faceted organisations (1 000+ employees), covering all seven (7) criteria points for Talent Management and Assessment expertise. = 30 Points Consultants demonstrate relevant expertise and experience over the past 5 years in large, multi-faceted organisations (1 000+ employees); however, one area of the Talent Management and Developmental Assessment criteria is not demonstrated. = 25 Points Consultants demonstrate relevant expertise and experience over the past 5 years in large, multi-faceted organisations (1 000+ employees); however, two areas of the Talent Management and Developmental Assessment criteria are not demonstrated. = 20 Points Consultants demonstrate relevant expertise and experience over the past 5 years in large, multi-faceted organisations (1 000+ employees); however, three areas of the Talent Management and Developmental Assessment criteria are not demonstrated. = 15 Points Consultants demonstrate relevant expertise and experience over the past	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
			5 years in large, multi-faceted organisations (1 000+ employees); however, four areas of the Talent Management and Developmental Assessment criteria are not demonstrated. = 10 Points Consultants demonstrate relevant expertise and experience over the past 5 years in large, multi-faceted organisations (1 000+ employees); however, five or more areas of the Talent Management and Developmental Assessment criteria are not demonstrated. = 5 Points Consultants' relevant expertise and experience is not relevant with none of the 7 areas evident as per the Talent Management and Developmental Assessment criteria. = 0 Points	
4	Digital Enablement (Talent Management Systems and Tools)	Ability to use, or have secure access to, a Talent Management and Developmental Assessment platform or system that is built into the consulting approach and is not used as a standalone system. The platform or system must provide online, digital, or system-based support to the City's Talent Management programmes and be actively used during service delivery. The system adequately supports the City's Talent Management needs and includes developmental assessment and reporting functionality Whether the platform or system is owned, licensed, or accessed through a third party, it must support the following functional capabilities:	The tenderer demonstrates that it has a digital Talent Management system that fully meets the Digital Enablement criteria and supports all nine (9) required functional capabilities. = 50 points The tenderer demonstrates that it has a digital Talent Management system that fully meets the Digital Enablement criteria and supports eight (8) required functional capabilities = 40 points The tenderer demonstrates that it has a digital Talent Management system	50

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		1. Talent Profiles: Electronic creation, updating, and ongoing maintenance of individual Talent Profiles 2. Manage Talent Feedback: Capture, tracking, and consolidation of manager inputs, including employee development needs, critical or scarce skills indicators, and flight-risk indicators 3. Succession Planning: Identification and tracking of successors for critical roles, including readiness levels and associated development actions 4. Talent Review / Calibration Support: Consolidated talent views and reports to support Talent Review discussions, calibration processes, and governance forums 5. Personal Development Plans: Translation of identified development needs into structured personal and career development plans 6. Talent Development: Generation of development-focused learning recommendations or “nudges” linked to assessment outcomes, competency gaps, career pathways, and development plans to support learning and development actions 7. Talent Data: Analysis and use of talent data to support Talent Management, talent development, and succession planning decisions	that meets most of the Digital Enablement criteria and supports seven (7) of the required functional capabilities. = 35 points The tenderer demonstrates that it has a digital Talent Management system that meets most of the Digital Enablement criteria and supports six (6) of the required functional capabilities. = 30 points The tenderer demonstrates that it has a digital Talent Management system that meets some of the Digital Enablement criteria and supports five (5) of the required functional capabilities. = 25 points The tenderer demonstrates that it has a digital Talent Management system that meets some of the Digital Enablement criteria and supports four (4) of the required functional capabilities. = 20 points The tenderer demonstrates limited digital enablement capability, supporting three (3) of the required functional capabilities. = 15 points The tenderer demonstrates very limited digital enablement capability, supporting two (2) of the required functional capabilities. = 10 points The tenderer demonstrates minimal digital enablement capability, supporting only one (1) of the	

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		8. Data Import and Export: Secure import of City-owned talent, workforce, and assessment data into the platform, and the ability to export talent and assessment data, reports, and underlying datasets in CSV or other editable data formats. 9. Role-Based Access: Role-based access controls to ensure appropriate visibility and management of Talent information in line with governance and data-protection requirements In addition, the platform or system must: 1. support the administration and reporting of developmental assessments, 2. include the generation of standardised developmental assessment reports 3. Include talent insights that do not require interpretation by an Industrial/Organisational Psychologist	required functional capabilities. = 5 points The tenderer has no digital enablement capability, supporting none of the required functional capabilities .= 0 points Platform or system meets all three criteria = 20 points Platform or system meets two of the criteria = 10 points Platform or system meets one or less of the criteria = 0 points	20
				Total 160

The minimum qualifying score for functionality is **112 points (70%)** out of a maximum of **160 points**.

PART G: INTEGRATED PEOPLE MANAGEMENT, ORGANISATIONAL DESIGN SOLUTIONS AND BUSINESS IMPROVEMENT

The tenderer must be able to provide resources including **Senior Human Capital Management and Human Capital Management professionals/consultants** specialising in the field of people/talent management. The specific focus of these resources must **include experience in talent research, talent management processes facilitation, talent development and the interpretation and implementation of strategic workforce plans (SWPs) and Operational Workforce Plans (OWPs) also known as people management or talent strategies**.

The tenderer must provide **Senior Organisational Design practitioners** with the ability to design **operating models** based on organisational strategies and business models and design **organisational structures** based on optimised processes and systems.

The tenderer must be able to provide **Lean Six Sigma and Senior Lean Six Sigma (Black Belt) specialists** to assist the organisation in the **identification and implementation of business improvement initiatives** to realise benefits in terms of either cost savings, revenue enhancement or service delivery improvement.

To ensure a high-quality solution and be able to communicate results, the tenderer must ensure the inclusion of appropriate software **platforms for statistical analysis, benefit reporting and dashboarding, organisational design scenario modelling and analysis, and business process mapping.**

Experience: Provide evidence of previous relevant experience as a business in providing consulting services for integrated people management, operating model design, organisational design and business improvement that have resulted in the development of **strategic workforce plans / talent / HCM strategies / operational efficiencies / improved organisational structural design** in organisations of a similar nature to the CCT requirements (complexity, size (5 000 staff plus) as per the past 10 years (work being done in the past 10 years will be applicable as per the more recent involvement of HR / talent / people management practice in this field). Details of experience to be evident in a company profile confirming the extent of the experience.

Provide **CV's (as per the template provided in schedule F.19 in this tender)** of the senior consultants confirming years of experience in operating model design, organisational design, business improvement, strategic workforce plans research, development and implementation.

Resources: Provide details of the **number of senior consultants and consultants available** for this tender. Provide details of employees/staff. This will be applicable to business process improvement, organisational design, strategic workforce planning and talent strategy development. Provide an indication of the employees/staff to support the business process improvement, people management consultation and organisational design processes.

Expertise: Provide details of the expertise of the HCM Consultants and Senior HCM Consultants – see criteria points for assessment. Similarly, provide details of expertise for Lean Six Sigma and Senior Lean Six Sigma (Black Belt) specialists and Senior Organisational Design as well as Organisational Design consultants.

The tenderer must offer a **technology platform** for statistical analysis, benefit reporting and dashboarding, organisational design scenario modelling and analysis, and business process mapping. The outcome of such process must offer inputs to HCM (Human Capital Management) processes including Strategic Workforce Planning / talent strategies. The application of the technology platform must therefore achieve an integration of both Organisational Design and the Talent strategy / SWP processes.

Part G: Integrated People Management and Organisational Design solutions and Business Improvement

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
1.1	Experience Confirmation of experience as a company in providing Human Capital Management (HCM) Consultants for strategic workforce planning / talent strategies (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	The tenderer's previous Relevant Experience in providing resources and capacity for management and completion of strategic workforce plans / talent / HCM strategies in organisations of a similar nature to the CCT requirements (complexity, size – Multi faceted organisation with 5 000 employees plus) as per the past 10 years. Details of experience to be evident in a company profile.	The tenderer has outlined the details of at least 10 or more assignments meeting the criteria for Human Capital Management solutions in large multi-faceted organisations of more than 5 000 employees over the past 10 years = 30 points The tenderer has outlined the details of at least 7 - 9 assignments meeting the criteria for Human Capital Management solutions in large multi-faceted organisations of more than 5 000 employees over the past 10 years = 20 points The tenderer has outlined the details of at least 4 - 6 assignments meeting the criteria for Human Capital Management solutions in large multi-faceted organisations of more than 5 000 employees in the past 10 years = 10 points	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		<u>Criteria for HCM solutions</u> • The design, development, and delivery of career streams, development of role profiles, job content diagnostics, job analysis, job design, and the benchmarking of job families to support organisational design and optimisation initiatives. • Support for the implementation of career progression pathways and fully aligned job descriptions that comply with the City's organisational requirements as well as applicable legislative and regulatory frameworks. • The integration of all talent solutions into a cohesive and structured framework, collated into an accessible electronic platform to ensure ease of use, transparency, and sustainability. • The development and implementation of strategic workforce plans and associated talent strategies, ensuring alignment with organisational objectives, future capability requirements, and workforce sustainability.	The tenderer has outlined the details of 3 or less assignments meeting the criteria for Human Capital Management solutions in large multi-faceted organisations of more than 5 000 employees in the past 10 years = 0 points	

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Individual Senior Human Capital consultant with relevant years' experience (Must confirm in CV approach, experience and work completed) (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Have experience as a Senior Human Capital Management professional in providing research, development, and implementation of strategic workforce plans, as well as linked to development of talent strategies and capabilities.	More than nine (9) years' senior leadership level experience = 10 points Six (6) to nine (9) years' senior leadership-level experience = 8 points Four (4) or more but up to six (6) years' senior leadership-level experience = 6 points Two (2) or more but up to four (4) years' senior leadership-level experience = 4 points Less than Two (2) years' senior leadership-level experience = 0 points	10
	Individual Human Capital consultant with relevant years' experience (Must confirm in CV approach, experience and work completed)	Have experience as Human Capital Management professional providing research, development, and implementation of strategic workforce plans, as well as linked to development of talent strategies and capabilities.	More than nine (9) years' experience = 10 points Six (6) to nine (9) years' experience = 8 points Four (4) or more but up to six (6) years' experience = 6 points Two (2) or more but up to four (4) years' experience = 4 points Less than two (2) years' experience = 0 points	10
1.2	Experience Confirmation of experience as a company in providing Operating Model and Organisational design consulting services. (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	The tenderer must demonstrate relevant experience, within the past ten (10) years, in delivering Operating Model and Organisational Design consulting services. This should include assignments involving the development of target operating models, organisational structure design and optimisation, realised or forecasted benefits, governance and accountability frameworks, job architecture and role design, capability and workforce assessments, spans	The tenderer has outlined details of at least 10 assignments in the past 10 years that meet the criteria for Operating Model and Organisational Design, delivered within large, multifaceted organisations employing more than 5 000 employees, with each assignment delivering a realised or forecasted benefit of R10M or more in either cost savings, revenue enhancement or a 10% improvement in operational performance = 30 Points The tenderer has outlined details of at least 7-9 assignments in the past 10 years that meet the criteria for Operating Model and	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		and layers reviews, strategic workforce alignment, and organisational transformation initiatives. Experience should specifically demonstrate the ability to align organisational structures, quantify benefits, people capabilities, and service delivery requirements to strategic business objectives within organisations of comparable complexity and scale to the City of Cape Town, namely large, multi-faceted organisations employing 5 000 or more staff. Evidence of this experience must be clearly and comprehensively reflected in the company profile and must include the following details for each relevant assignment: Client Information • Name of the client • Nature of the client's business • Approximate employee size of the organisation Scope of Work • Description of the project scope • Type of Organisational Design assignments undertaken (e.g. process mapping, performance measurement frameworks, operating model design, capability assessment, and	Organisational Design, delivered within large, multifaceted organisations employing more than 5 000 staff, with each assignment delivering a realised or forecasted benefit of R10M or more in either cost savings, revenue enhancement or a 10% improvement in operational performance = 20 Points The tenderer has outlined details of at least 4-6 assignments in the past 10 years that meet the criteria for Operating Model and Organisational Design, delivered within large, multifaceted organisations employing more than 5 000 staff, with each assignment delivering a realised or forecasted benefit of R10M or more in either cost savings, revenue enhancement or a 10% improvement in operational performance = 10 Points The tenderer has outlined details of 3 or fewer assignments in the past 10 years that meet the criteria for Operating Model and Organisational Design, delivered within large, multifaceted organisations employing more than 5 000 staff, with each assignment delivering a realised or forecasted benefit of R10M or more in either cost savings, revenue enhancement or a 10% improvement in operational performance = 0 Points	

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		organisational transformation projects.) Resources Deployed - Number of resources allocated to the assignment - Type of resources (e.g. consultants, specialists, facilitators, project managers) Project Duration - Start and end dates of the assignment		
	Individual Senior Organisational design consultants' relevant years' experience (Must confirm in CV approach, experience and work completed) (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Has demonstrated experience as a Senior Organisational Design profession, leading transformation projects that encompass process mapping, development of target operating models, and human capital aspects.	More than nine (9) years' senior level OD consulting and leadership level experience = 10 points Six (6) to nine (9) years' senior level OD consulting and leadership-level experience = 8 points Four (4) or more but up to six (6) years' senior leadership-level experience = 6 points Two (2) or more but up to four (4) years' senior level OD consulting and leadership-level experience = 4 points Less than Two (2) years' senior level OD consulting and leadership-level experience = 0 points	10
	Individual Organisational design consultants' relevant years' experience (Must confirm in CV approach, experience and work completed) (Complete a summary of the tenderer's resources in schedule F.15 and	Has demonstrated experience as an Organisational Design Consultant, providing guidance and advice on transformation projects that include process mapping, development of target operating models, and human capital initiatives.	More than nine (9) years' experience = 10 points Six (6) to nine (9) years' experience = 8 points Four (4) or more but less than six (6) years' experience = 6 points Two (2) or more but less than four (4) years' experience = 4 points Less than two (2) years' experience = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	a declaration of resources availability in schedule F.20 in this tender)			
1.3	Experience Confirmation of experience as a company in providing Lean Six Sigma consulting services. (Complete a summary of the tenderer's experience in schedule F.16 in this tender)	The tenderer must demonstrate relevant experience, within the past 10 years, in delivering continuous business process improvement. This should include assignments such as revenue generation, cost saving and resource optimisation, specifically within organisations of comparable complexity and scale to the CCT—multifaceted entities employing 2 000 or more staff. Evidence of this experience must be clearly and comprehensively reflected in the company profile and must include the following details for each relevant assignment: Client Information • Nature of the client's business • Approximate employee size of the organisation Scope of Work • Description of the project scope • Type of Business Process improvement project undertaken including actual Rand value of cost efficiencies, resource optimisation, revenue generation Resources Deployed • Number of resources allocated to the assignment • Type of resources	The tenderer has outlined details of 10 assignments in the past 5 years that meet the criteria for Business Improvement (encompassing a holistic solution across people, process and technology elements), delivered within large, multifaceted organisations employing more than 2 000 staff, with each assignment delivering a realised benefit of R10M or more in either cost savings, revenue enhancement or an equivalent improvement in operational performance = 30 points The tenderer has outlined details of 7-9 assignments in the past 5 years that meet the criteria for Business Improvement (encompassing a holistic solution across people, process and technology elements), delivered within large, multifaceted organisations employing more than 2 000 staff, with each assignment delivering a realised benefit of R10M or more in either cost savings, revenue enhancement or an equivalent improvement in operational performance = 20 points The tenderer has outlined details of 4-6 assignments in the past 5 years that meet the criteria for Business Improvement (encompassing a holistic solution across people, process and technology elements), delivered within large, multifaceted organisations employing more than 2 000 staff, with each assignment delivering a realised benefit of R10M or more in either cost savings, revenue enhancement or an equivalent improvement in operational performance = 10 points	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		(e.g. Lean Six Sigma, Black Belt specialists) Project Duration Start and end dates of the assignment	The tenderer has outlined details of 3 or fewer assignments in the past 5 years that meet the criteria for Business Improvement (encompassing a holistic solution across people, process and technology elements), delivered within large, multifaceted organisations employing more than 2 000 staff, with each assignment delivering a realised benefit of R10M or more in either cost savings, revenue enhancement or an equivalent improvement in operational performance = 0 points	
	Individual Senior Lean Six Sigma (Black Belt) Specialist relevant years' experience (Must confirm in CV approach, experience and work completed) (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Has demonstrated experience as a Senior Lean Six Sigma (Black Belt) Specialist on projects that encompass cost efficiencies, resource optimisation and revenue generation by means of people, process and technology solutions	More than nine (9) years' Lean Six Sigma Black Belt experience = 10 points Six (6) to nine (9) years' Lean Six Sigma Black Belt experience = 8 points Four (4) or more but up to six (6) years' Lean Six Sigma Black Belt experience = 6 points Two (2) or more but up to four (4) years' Lean Six Sigma Black Belt experience = 4 points Less than Two (2) years' Lean Six Sigma Black Belt experience = 0 points	10
	Individual Lean Six Sigma consultants relevant years' experience (Must confirm in CV approach, experience and work completed) (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of	Has demonstrated experience as a Lean Six Sigma Consultant on projects that encompass cost efficiencies, resource optimisation and revenue generation by means of people, process and technology solutions	More than nine (9) years' experience = 10 points Six (6) to nine (9) years' experience = 8 points Four (4) or more but less than six (6) years' experience = 6 points Two (2) or more but less than four (4) years' experience = 4 points Less than two (2) years' experience = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	resources availability in schedule F.20 in this tender)			
2	Resources Availability of Senior Human Capital Management and Human Capital Management consultants (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Number of consultants available meeting the required experience as per the requirements stipulated under the experience section of this table	More than six (6) suitably qualified consultants available = 10 points Four (4) to six (6) suitably qualified consultants available = 7 points Two (2) to three (3) suitably qualified consultants available = 4 points One (1) suitably qualified consultant available = 2 points No suitably qualified consultants available = 0 points	10
	Availability of Senior Organisational Design consultants and Organisational Design consultants (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Number of consultants available meeting the required experience as per the requirements stipulated	More than Six (6) suitably qualified consultants available = 10 points Five (5) to six (6) suitably qualified consultants available = 7 points Three (3) to Four (4) suitably qualified consultants available = 4 points Two (2) suitably qualified consultants available = 2 points Less than 2 suitably qualified consultants with or without relevant experience = 0 points	10
	Number of project consulting resources available with relevant experience to support people management and Organisational Design consultation processes (Complete a summary of the tenderer's resources in schedule F.15 and	Project consulting resources to support people management consultation	More than 9 resources with relevant experience = 10 points 6-9 resources with relevant experience = 7 points 4-5 resources with relevant experience = 5 points 3 resources with relevant experience = 3 points Less than 3 resources allocated = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	a declaration of resources availability in schedule F.20 in this tender) Availability of Lean Six Sigma and Senior Lean Six Sigma (Black Belt) specialist (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Number of consultants available meeting the required experience as per the requirements stipulated	More than five (5) suitably qualified consultants available = 10 points Four (4) suitably qualified consultants available = 7 points Three (3) suitably qualified consultants available = 4 points Two (2) suitably qualified consultants available = 2 points Less than two (2) suitably qualified consultants with or without relevant experience = 0 points	10
3	Expertise (As per the CVs of the HCM consultants proposed for this tender) (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	<u>Criteria points for Strategic Workforce Planning (SWP) / Operational Workforce Planning (OWP) expertise</u> 1. Research and interpret business plans, strategy documents, and functional structures to identify workforce implications. 2. Prepare the initial draft SWP/OWP document, incorporating relevant talent metrics and workforce data. 3. Guide, advise, and support the Talent Team Lead in managing SWPs/OWPs 4. Develop the final strategic workforce plan, ensuring alignment between business strategy and people/talent strategies. 5. Translate SWP/OWP content into actionable talent strategies and talent	Tenderers expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years and covers all seven criteria points for SWP expertise = 10 points Tenderers expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but one area of the criteria points for SWP expertise is not evident = 8 points Tenderers expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but two areas of the criteria points for SWP expertise are omitted = 6 points Tenderers expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but three areas of the criteria points for SWP expertise are omitted = 4 points Tenderers expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but four areas of	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Expertise (As per the CVs of the Organisational Design consultants proposed for this tender) (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	management initiatives. 6. Report on completed SWPs / OWPs and maintain tracker documents to monitor ongoing evolution. 7. Provide guidance and advice on SWP / OWP methodology and its practical application. <u>Criteria points for Organisational Design expertise</u> 1. Analyse organisational strategy and service delivery objectives to determine organisational and workforce implications. 2. Develop and review Target Operating Models (TOMs) that align structures, governance, processes and capabilities. 3. Design and evaluate organisational structures, including functions, reporting relationships, spans of control and management layers. 4. Conduct organisational and capability assessments to identify structural gaps, duplication, inefficiencies and future capability requirements.	the criteria points for SWP expertise are omitted = 2 points Tenderers' expertise / experience includes work completed however either not in large multi-faceted organisations of more than 10 000 staff over the past 10 years, or not as relevant to the criteria points for SWP expertise = 0 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years and covers all criteria points for Organisational design expertise = 10 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but one area of the criteria points for Organisational design expertise is not evident = 8 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but two areas of the criteria points for Organisational design expertise are omitted = 6 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but three areas of the criteria points for Organisational design expertise are omitted = 4 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but four areas of the criteria points for Organisational design	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		5. Develop and implement job architecture frameworks, including job families, role profiles, levels of work and job design principles. 6. Undertake organisational design diagnostics and option development, including scenario modelling and affordability assessments. 7. Integrate organisational design with strategic workforce planning and talent strategies, ensuring alignment between structure and future workforce capability. 8. Develop organisational governance and accountability frameworks, including role clarity, decision rights and operating principles. 9. Facilitate organisational transformation and implementation planning, including transition roadmaps, change impacts and post-implementation optimisation	expertise are omitted = 2 points Tenderers' expertise / experience includes work completed however either not in large multi-faceted organisations of more than 5 000 staff over the past 10 years, or not as relevant to the criteria points for Organisational design expertise = 0 points	

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
	Expertise (As per the CVs of the Lean Six Sigma and Senior Lean Six Sigma (Black Belt) specialists proposed for this tender) (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	<u>Criteria points for Lean Six Sigma and Lean Six Sigma and (Black Belt) expertise</u> - Analyse organisational strategy and operational performance to identify opportunities for continuous business improvement. - Identify and prioritise business processes for improvement or redesign using data-driven methodologies. - Conduct process mapping and current-state (AS-IS) analysis to understand existing workflows, waste and constraints. - Apply Lean Six Sigma methodologies and analytical tools (e.g. DMAIC, value stream mapping, root cause analysis, statistical analysis) to diagnose process issues. - Define customer, stakeholder and service requirements and translate these into measurable process performance objectives. - Design and develop future-state (TO-BE) process models that optimise people, process and technology integration.	Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years and covers all criteria points for Organisational design expertise = 10 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but one area of the criteria points for Organisational design expertise is not evident = 8 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but two areas of the criteria points for Organisational design expertise are omitted = 6 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but three areas of the criteria points for Organisational design expertise are omitted = 4 points Tenderers' expertise / experience includes work completed in large multi-faceted organisations of more than 5 000 staff over the past 10 years, but four areas of the criteria points for Organisational design expertise are omitted = 2 points Tenderers' expertise / experience includes work completed however either not in large multi-faceted organisations of more than 5 000 staff over the past 10 years, or not as relevant to the criteria points for Organisational design expertise = 0 points	10

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		7. Identify and quantify opportunities for cost savings, revenue enhancement and resource optimisation, including business case development. 8. Develop and implement performance measurement frameworks, including KPIs, process controls and benefits realisation mechanisms. 9. Lead and support the implementation and continuous improvement of redesigned processes, embedding sustainable change through governance, capability building and monitoring.		
	Digital Enablement Leverage organisational design technology platform to process HCM inputs and support org design projects	Ability to use, or have secure access to, an Organisational Design platform or system that can enhance the consulting approach. The platform or system must provide online, digital, or system-based support to the City's Organisational Design, business improvement, job architecture, and organisation optimisation initiatives and must be actively used during service delivery. Whether the platform or system is owned, licensed, or accessed through a third party, it must support the following:	The Tenderer demonstrates that it has a digital Organisational Design platform that fully meets the Digital Enablement criteria and supports all seven (7) required Organisational Design functional capabilities. = 30 points The tenderer demonstrates that it has a digital Organisational Design platform that meets most of the Digital Enablement criteria and supports six (6) of the required Organisational Design functional capabilities. = 25 points The tenderer demonstrates that it has a digital Organisational Design platform that meets most of the Digital Enablement criteria and supports five (5) of the required Organisational Design functional capabilities. = 20 points	30

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		1. Organisational Structure Modelling and Scenario Planning: Support the modelling and visualisation of current-state and future-state organisational structures, including detailed organisational charts, reporting relationships, and defined levels of work, to enable robust scenario analysis and assessment of alternative organisational designs and their implications for efficiency, affordability, service delivery, and governance. 2. Job Architecture and Job Analysis: The platform must support the development and management of job architecture, including job families, levels, role profiles, and job descriptions, together with structured job analysis and job design. 3. Workforce Structure Analysis and Optimisation: The platform must provide analysis of workforce structures, including spans of control, management layers, and filled and vacant positions, to support organisational optimisation.	The tenderer demonstrates that it has a digital Organisational Design platform that meets some of the Digital Enablement criteria and supports four (4) of the required Organisational Design functional capabilities. = 15 points The tenderer demonstrates that it has a digital Organisational Design platform that meets some of the Digital Enablement criteria and supports three (3) of the required Organisational Design functional capabilities. = 10 points The tenderer demonstrates limited digital Organisational Design enablement, supporting two (2) of the required Organisational Design functional capabilities. = 5 points The tenderer demonstrates minimal or no digital Organisational Design enablement, supporting fewer than two (2) of the required functional capabilities, or does not provide a digital Organisational Design platform. = 0 points	

No.	Evaluation Criteria	Guidelines for Criteria Application	Points Allocation	Score
		4. Integration with Talent and Workforce Planning Solutions: The platform must integrate with talent management and strategic workforce planning solutions to align organisational structures with capability requirements and career pathways. 5. Digital Platform, Security, and Accessibility: The platform must be a secure, system-based solution that provides centralised, accessible management of organisational design artefacts in line with governance and information security requirements. 6. Role-Based User Access and Permissions: The platform must support role-based access with controlled permissions, secure authentication, and auditable change tracking. 7. Data Import, Export, and Reporting Functionality: The platform must support data import and export to ensure all City Data can be extracted.		
				Total 250

The minimum qualifying score for functionality is **175 points (70%)** out of a maximum of **250**.

Part H - Innovation Management Services

The tenderer must be able to provide **resources in a Senior Innovation Management Consultant and Innovation Management Consultant** specialising in the field of innovation management. The specific focus of these resources must include experience in the **development of innovation strategies, implementation plans, innovation capability/maturity index measures, the development of innovation case studies, innovation training, programmes and workshops** which also consider input from idea management platforms.

Resource expertise: key personnel including allocation (competencies of the individuals involved) as a collective team. Qualifications of the team lead and team members as well as experience to be captured in the CV's of the proposed resources.

Experience: (information provided in a company profile)

- Development of Innovation strategy and implementation plan
- Working in Local Government context in South Africa
- Conducting Innovation Capability/Maturity Index Measure in organisations with similar complexity
- Development of Innovation Case Studies in organisations with similar complexity
- Development and facilitation of Innovation Programmes in organisations with similar complexity

Technical expertise: (Information provided in company profile)

- Proposed approach for the development of the Innovation Strategy
- Proposed approach for the Innovation Capability/Maturity Index measure
- Proposed approach for the development of the Innovation Case Studies
- Proposals for Innovation Programme development and facilitation

Where the word "equivalent" degree is mentioned in Part H, it implies a degree or qualification at the same NQF level.

Part H - Innovation Management Services

No.	Criteria	Evaluation Criteria	Point Allocation	Score
1.	Expertise of key personnel including allocation (competencies of the individuals involved) as a collective team) <i>(Supporting Documents including CV to be included as per schedule F.19)</i> (Complete a summary of the tenderer's resources in schedule F.15 and a declaration of resources availability in schedule F.20 in this tender)	Expertise of key Personnel Qualification - Project team lead with a minimum Master's in Business Management or equivalent Master's degree with innovation/innovation management as module including Design Thinking or Futures Thinking	• For Masters in Business Management or equivalent Master's degree / NQF 9 qualification with innovation/ innovation management as module including Design-Thinking or Futures Thinking or higher = 10 points • For a B-degree (NQF 7) qualification in Business Science/Administration/Management or equivalent and post graduate diploma/honours degree (NQF 8 qualification) in innovation with Design Thinking or Futures Thinking or modules in these studies = 7 points • For less than B-degree (NQF 7) qualification in Business Science or equivalent with Design Thinking or Futures	30 10

No.	Criteria	Evaluation Criteria	Point Allocation	Score
			Thinking or modules in these studies = 0 points	
		Qualification - Team members with a minimum Degree or Diploma in Business Management or equivalent degree with innovation/ innovation management as module and future scenarios including Design Thinking or Futures Thinking	• For Masters in Business Management or equivalent Master's degree / NQF 9 qualification with innovation/ innovation management as module including Design Thinking or Futures Thinking = 10 points • For a post graduate diploma/honours (NQF 8 qualification) in innovation with Design Thinking or Futures Thinking or modules in these studies = 8 points • For a B-degree (NQF 7) qualification or Diploma (NQF 6) qualification or equivalent preferably in innovation with Design Thinking or Futures Thinking or modules in these studies = 5 points • For less than B-degree (NQF 7) in Business Science qualification or Diploma (NQF 6) qualification or equivalent with Design Thinking or Futures Thinking or modules in these studies = 0 points	10
		Relevant experience in innovation and Design Thinking (with reference) over the past 5-10 years in the following: 1. Development of Innovation Strategies & Implementation plans 2. Measure of Innovation Capability Index 3. Development of Innovation Case Studies 4. Implementation of Innovation Programmes	• For experience in all 4 innovation and design thinking areas listed = 10 points • For experience in 3 of the innovation and design thinking areas listed = 7 points • For experience in 2 of the innovation and design thinking areas listed = 5 points • For experience in 1 of the innovation and design thinking area listed = 2 points • For no experience in innovation and design thinking areas listed = 0 points	10

No.	Criteria	Evaluation Criteria	Point Allocation	Score
2.	Previous projects (of similar work in specified context) of the tenderer (Complete a summary of the tenderer's experience in schedule F.18 and F.19 in this tender)	Experience in the past 5-10 years in:		40
		Development of Innovation strategy and implementation plan - Evidence of development of Innovation Strategies using Design Thinking and implementation plans for organisations of an equivalent complexity and size (Multi-faceted organisation with 3 000 employees plus)	• Evidence of development of Innovation Strategies and implementation plans in 7 or more organisations of the similar complexity as the CCT = 10 points • Evidence of development of Innovation Strategies and implementation plans in 5 - 6 organisations of the same size and complexity as the CCT = 5 points • Evidence of development of Innovation Strategies and implementation plans in 3 - 4 organisations of the same size and complexity as the CCT = 3 points - Evidence of development of Innovation Strategies and implementation plans in less than 3 organisations of the same size and complexity as the CCT = 0 points	10
		Working in Local Government context in South Africa - Evidence of Innovation Strategy Development work done in Local Government in South Africa, particularly work done in the municipalities with 3000 employees or more.	• For Innovation Strategy Development in at least 2 local government institutions = 10 points • For strategy in 1 local government institution = 5 points • For no strategies in local government institutions = 0 points	10
		Conducting Innovation Capability/Maturity Index Measure in organisations with similar complexity - Evidence of Innovation Capability measures undertaken in complex organisations (3000 or more employees) in the past 5-10 years	• For Innovation Capability measures conducted in at least 3 organisations = 10 points • For Innovation Capability measures conducted in at least 2 organisations = 5 points • Innovation Capability measures conducted in at least 1 organisation = 2 points	10

No.	Criteria	Evaluation Criteria	Point Allocation	Score
			No innovation capability measures evident = 0 points	
		Development of Innovation Case Studies in organisations with similar complexity Evidence of Innovation Case Studies developed in the past 5-10 years	- For 6 - 10 or more case studies = 5 points; - For 3 - 5 case studies = 3 points - For 1 - 2 case studies = 1 point - For no case studies = 0 points	5
		Development and facilitation of Innovation Programmes in organisations with similar complexity Evidence of development and facilitation of Innovation programmes including training, innovation think tanks and workshops	- For at least 10 or more Innovation programmes = 5 points - For 5-9 Innovation programmes = 3 points - For 1 - 4 Innovation programmes = 1 point - For no Innovation programmes = 0 points	5
3.	Approach & Methodology (Complete a summary of the tenderer's experience in schedules F.18 and F.19 in this tender)	Proposal of no more than 15 pages illustrating the following:		30
		Proposed approach for the development of the Innovation Strategy - Proposed process for Strategy development including five components: - situation analysis - future scenarios, - strategy formulation methodology, - innovation strategic goals and focus areas, - implementation plan.	- For a proposal for process for strategy development including all five components = 10 points - For a proposal for process for strategy development including three components = 7 points - For a proposal for process for strategy development including two components = 5 points - For a proposal for process for strategy development including one component = 3 points - For a proposal for process for strategy development with none of the components = 0 points	10
		Proposed approach for the Innovation Capability/Maturity Index measure - Details of the following: - Tool and methodology to be utilised for the measure of the Innovation Capability/Maturity Index as aligned to the directorates/department including the	- For details of tool and methodology, including areas of improvement and alignment to ISO Innovation Standards (i, ii and iii) = 10 points - For details of tool and methodology, including areas of improvement and	10

No.	Criteria	Evaluation Criteria	Point Allocation	Score
		ii. Prioritisation of areas of focus for an improved Innovation Capability/Maturity index iii. Alignment to the ISO Innovation Standards	alignment to ISO Innovation Standards but only in 2 of 3 = 7 points • For details of tool and methodology, including areas of improvement and alignment to ISO Innovation Standards but only in 1 of 3 = 5 points • For no details of tool and methodology, including areas of improvement and alignment to ISO Innovation Standards = 0 points	
		Proposed approach for the development of the Innovation Case Studies - Proposal which includes the following; i. Development of Innovation Case studies, ii. Design concept iii. Identification of channels of showcasing innovations -	• For development of case studies, design concept and channels of showcasing innovations (i – iii) = 5 points • For development of case studies, design concept and channels of showcasing innovations but only covering i = 3 points • For no proposal = 0 points	5
		Proposals for Innovation Programme development and facilitation - Examples provided of: 4. proposed innovation training programmes, 2. Innovation Workshop facilitation methodologies and; 3. programme implementation plan	• For examples with detail on all three aspects = 5 points • For examples with detail on only two aspects = 3 points • For no detail = 0 points	5
			Total	100

The minimum qualifying score for functionality is **70 points (70%)** out of a maximum of **100 points**.

Where the entity tendering is a Joint Venture, the tenderer's tender response must be accompanied by a statement describing exactly what aspects of the work will be undertaken by each party to the joint venture.

Tenderers shall ensure that all relevant information has been submitted with the tender offer in the prescribed format to ensure optimal scoring of functionality points for each Evaluation Criteria. Failure to provide all information **IN THIS TENDER SUBMISSION** could result in the tenderer not being able to achieve the specified minimum scoring.

2.2.1.1.6 Provision of samples

Only those tenders submitted by tenderers who provided acceptable samples as stated in the Tender Specifications will be declared responsive.

2.2.2 Cost of tendering

The CCT will not be liable for any costs incurred in the preparation and submission of a tender offer, including the costs of any testing necessary to demonstrate that aspects of the offer comply with requirements.

2.2.3 Check documents

The documents issued by the CCT for the purpose of a tender offer are listed in the index of this tender document.

Before submission of any tender, the tenderer should check the number of pages, and if any are found to be missing or duplicated, or the figures or writing is indistinct, or if the Price Schedule contains any obvious errors, the tenderer must apply to the CCT at once to have the same rectified.

2.2.4 Confidentiality and copyright of documents

The tenderer shall treat as strictly confidential all matters arising in connection with the tender. Use and copy the documents issued by the CCT only for the purpose of preparing and submitting a tender offer in response to the invitation.

2.2.5 Reference documents

The tenderer shall obtain, as necessary for submitting a tender offer, copies of the latest versions of standards, specifications, Conditions of Contract and other publications, which are not attached but which are incorporated into the tender document(s) by reference.

2.2.6 Acknowledge and comply with notices

The tenderer shall acknowledge receipt of notices to the tender documents, which the CCT may issue, and shall fully comply with all instructions issued in the said notices, and if necessary, apply for an extension of the closing time stated on the front page of the tender document, in order to take the notices into account. Notwithstanding any requests for confirmation of receipt of the said notices issued, the tenderer shall be deemed to have received such notices if the CCT can show proof of transmission thereof via electronic mail, facsimile, or registered post or other lawful means.

2.2.7 Clarification meeting

The tenderer shall attend, where required, a clarification meeting at which tenderers may familiarise themselves with aspects of the proposed work, services or supply and pose questions. Details of the meeting(s) are stated in the General Tender Information (i.e., in item T.1 above).

Tenderers should be represented at the site visit/clarification meeting by a duly authorised person who is suitably qualified and experienced to comprehend the implications of the work involved.

2.2.8 Seek clarification

The tenderer shall request clarification of the tender documents, if necessary, by notifying the CCT at least one week before the closing time stated in the General Tender Information (i.e., in item T.1 above), where possible.

2.2.9 Pricing the tender offer

2.2.9.1 The tenderer shall comply with all pricing instructions as stated on the Price Schedule.

2.2.10 Alterations to documents

The tenderer shall not make any alterations or additions to the tender documents, except to comply with instructions issued by the CCT in writing, or necessary to correct errors made by the tenderer. All signatories to the tender offer shall initial all such alterations.

2.2.11 Alternative tender offers

2.2.11.1 Unless otherwise stated in the Conditions of Tender, the tenderers may submit alternative tender offers only if a main tender offer, strictly in accordance with all the requirements of the tender documents, is also submitted.

If a tenderer wishes to submit an alternative tender offer, he/she/it shall do so as a separate offer on a complete set of tender documents. The alternative tender offer shall be submitted in a separate

sealed envelope clearly marked “Alternative Tender” in order to distinguish it from the main tender offer.

Only the alternative of the highest ranked acceptable main tender offer (that is, submitted by the same tenderer) will be considered, and if appropriate, recommended for award.

Alternative tender offers of any but the highest ranked main tender offer will not be considered.

An alternative tender offer to the highest ranked acceptable main tender offer that is priced higher than the main tender offer may be recommended for award, provided that the ranking of the alternative tender offer is higher than the ranking of the next ranked acceptable main tender offer.

The CCT will not be bound to consider alternative tenders and shall have sole discretion in this regard.

In the event that the alternative is accepted, the tenderer warrants that the alternative offer complies in all respects with the CCT’s standards and requirements as set out in the tender document.

2.2.11.2 Acceptance of an alternative tender offer by the CCT may be based only on the criteria stated in the Conditions of Tender or applicable criteria otherwise acceptable to the CCT.

2.2.12 Submitting a tender offer

2.2.12.1 The tenderer is required to submit one tender offer only on the original tender documents as issued by the CCT, either as a single tendering entity or as a member in a joint venture to provide the whole of the works, services or supply identified in the Conditions of Contract and described in the Specifications. Only those tenders submitted on the tender documents as issued by the CCT together with all Tender Returnable Documents duly completed and signed will be declared responsive.

2.2.12.2 The tenderer shall return the entire tender document to the CCT after completing it in its entirety, either electronically (if they were issued in electronic format) or by writing legibly in non-erasable ink.

2.2.12.3 The tenderer shall sign the original tender offer where required in terms of the Conditions of Tender. The tender shall be signed by a person duly authorised by the tenderer to do so. Tenders submitted by joint ventures of two or more firms shall be accompanied by the document of formation / founding document of the joint venture or any other document signed by all Parties, in which is defined precisely the conditions under which the joint venture will function, its period of duration, the persons authorised to represent and obligate it, the participation of the several firms forming the joint venture, and any other information necessary to permit a full appraisal of its functioning. Signatories for tenderers proposing to contract as joint ventures shall state which of the signatories is the lead partner.

2.2.12.4 Where a two-envelope system is required in terms of the Conditions of Tender, place and seal the returnable documents listed in the Conditions of Tender in an envelope marked “financial proposal” and place the remaining returnable documents in an envelope marked “technical proposal”. Each envelope shall state on the outside the CCT’s address and identification details stated in the General Tender Information (i.e., item T.1 above), as well as the tenderer’s name and contact address.

2.2.12.5 The tenderer shall seal the original tender offer and copy packages together in an outer package that states on the outside only the CCT’s address and identification details as stated in the General Tender Information. . If it is not possible to submit the original tender and the required copies (see 2.2.12.3) in a single envelope, then the tenderer must seal the original and each copy of the tender offer as separate packages marking the packages as “ORIGINAL” and “COPY” in addition to the aforementioned tender submission details.

2.2.12.6 The CCT shall not assume any responsibility for the misplacement or premature opening of the tender offer if the outer package is not sealed and marked as stated.

2.2.12.7 Tender offers submitted by facsimile or e-mail will be rejected by the CCT, unless stated otherwise in the Conditions of Tender.

2.2.12.8 By signing the offer part of the Form of Offer (**Section 5, Part A hereto**) the tenderer warrants and agrees that all information provided in the tender submission is true and correct.

2.2.12.9 Tenderers shall properly deposit its bid in the designated tender box (as detailed on the front page of this tender document) on or before the closing date and before the closing time, in the relevant tender

box at the Tender & Quotation Boxes Office situated on the 2nd floor, Concourse Level, Civic Centre, 12 Hertzog Boulevard, Cape Town. If the tender submission is too large to fit in the allocated box, please enquire at the public counter for assistance.

2.2.12.10 The tenderer must record and reference all information submitted contained in other documents for example cover letters, brochures, catalogues, etc. in the Returnable Schedule titled **List of Other Documents Attached by Tenderer**.

2.2.13 Information and data to be completed in all respects

Tender offers, which do not provide all the data or information requested completely and, in the form, required, may be regarded by the CCT as non-responsive.

2.2.14 Closing time

2.2.14.1 The tenderer shall ensure that the CCT receives the tender offer, together with all applicable documents specified herein, at the address specified in the General Tender Information herein prior to the closing time stated on the front page of the tender document.

2.2.14.2 If the CCT extends the closing time stated on the front page of the tender document for any reason, the requirements of these Conditions of Tender apply equally to the extended deadline.

2.2.14.3 The CCT shall not consider tenders that are received after the closing date and time for such a tender (late tenders).

2.2.15 Tender offer validity and withdrawal of tenders

2.2.15.1 The tenderer shall warrant that the tender offer(s) remains valid, irrevocable and open for acceptance by the CCT at any time for a period of 120 days after the closing date stated on the front page of the tender document.

2.2.15.2 Notwithstanding the period stated in clause 2.2.15.1 above, bids shall remain valid for acceptance for a period of twelve (12) months after the expiry of the original validity period, unless the CCT is notified in writing of anything to the contrary by the bidder. The validity of bids may be further extended by a period of not more than six months subject to mutual agreement by the parties, administrative processes and upon approval by the City Manager, unless the required extension is as a result of an appeal process or court ruling.

In circumstances where the validity period of a tender has expired, and the tender has not been awarded, the tender process is considered "completed", despite there being no decision (award or cancellation) made. This anomaly does not fall under any of the listed grounds of cancellation and should be treated as a "non-award". A "non award" is supported as a recommendation to the CCT's Bod Adjudication Committee ("BAC") for noting.

2.2.15.3 A tenderer may request in writing, after the closing date, that its tender offer be withdrawn. Such withdrawal will be permitted or refused at the sole discretion of the CCT after consideration of the reasons for the withdrawal, which shall be fully set out by the tenderer in such written request for withdrawal. Should the tender offer be withdrawn in contravention hereof, the tenderer agrees that:

- a) it shall be liable to the CCT for any additional expense incurred or losses suffered by the CCT in having either to accept another tender or, if new tenders have to be invited, the additional expenses incurred or losses suffered by the invitation of new tenders and the subsequent acceptance of any other tender;
- b) the CCT shall also have the right to recover such additional expenses or losses by set-off against monies which may be due or become due to the tenderer under this or any other tender or contract or against any guarantee or deposit that may have been furnished by the tenderer or on its behalf for the due fulfilment of this or any other tender or contract. Pending the ascertainment of the amount of such additional expenses or losses, the CCT shall be entitled to retain such monies, guarantee or deposit as security for any such expenses or loss, without prejudice to the CCT's other rights and/or remedies available to it in accordance with any applicable laws.

2.2.16 Clarification of tender offer, or additional information, after submission

Tenderer shall promptly provide clarification of its tender offer, or additional information, in response to a written request to do so from the CCT during the evaluation of tender offers within the time period stated in such request. No change in the competitive position of tenderers or substance of the tender offer is sought, offered, or permitted.

Note: This clause does not preclude the negotiation of the final terms of the contract with a preferred tenderer following a competitive selection process, should the CCT elect to do so.

Failure, or refusal, to provide such clarification or additional information within the time for submission stated in the CCT's written request may render the tender non-responsive.

2.2.17 Provide other material

2.2.17.1 Tenderers shall promptly provide, upon request by the CCT, any other material that has a bearing on the tender offer, the tenderer's commercial position (including joint venture agreements), preferencing arrangements, or samples of materials, considered necessary by the CCT for the purpose of the evaluation of the tender. Should the tenderer not provide the material, or a satisfactory reason as to why it cannot be provided, by the time for submission stated in the CCT's request, the CCT may regard the tender offer as non-responsive.

2.2.17.2 The tenderer shall provide, on written request by the CCT, where the transaction value inclusive of VAT **exceeds R 10 million**:

- a) audited annual financial statement for the past 3 years, or for the period since establishment if established during the past 3 years, if required by law to prepare annual financial statements for auditing;
- b) a certificate signed by the tenderer certifying that the tenderer has no undisputed commitments for municipal services towards a municipality or other service provider in respect of which payment is overdue for more than 30 days;
- c) particulars of any contracts awarded to the tenderer by an organ of state during the past five years, including particulars of any material non-compliance or dispute concerning the execution of such contract;
- d) a statement indicating whether any portion of the goods or services are expected to be sourced from outside the Republic, and, if so, what portion and whether any portion of payment from the municipality or municipal entity is expected to be transferred out of the Republic.

Each entity to a Consortium/Joint Venture bid shall submit separate certificates/statements in the above regard.

2.2.17.3 Tenderers shall be required to undertake to fully cooperate with the CCT's external service provider appointed to perform a due diligence review and risk assessment upon receipt of such written instruction from the CCT.

2.2.18 Samples, Inspections, tests and analysis

Tenderers shall provide access during working hours to premises for inspections, tests and analysis as provided for in the Conditions of Tender or Specifications.

If the Specifications requires the tenderer to provide samples, these shall be provided strictly in accordance with the instructions set out in the Specification.

If such samples are not submitted as required in the bid documents or within any further time stipulated by the CCT in writing, then the bid concerned may be declared non-responsive.

The samples provided by all successful bidders will be retained by the CCT for the duration of any subsequent contract. Bidders are to note that samples are requested for testing purposes therefore samples submitted to the CCT may not in all instances be returned in the same state of supply and in other instances may not be returned at all. Unsuccessful bidders will be advised by the Project Manager or dedicated CCT Official to collect their samples, save in the aforementioned instances where the samples would not be returned.

2.2.19 Certificates

The tenderer must provide the CCT with all certificates as stated below:

2.2.19.1. Preference Points for Specific Goals

In order to qualify for preference points for HDI and/or Specific Goals, it is the responsibility of the tenderer to submit documentary proof (Company registration certification, Central Supplier Database report, BBBEE certificate, Proof of Disability, Financial Statements, commissioned sworn affidavits, etc.) in support of tenderer claims for such preference for that specific goal.

Tenderers are further referred to the content of the Preference Schedule for the full terms and conditions applicable to the awarding of preference points.

2.2.19.2 Evidence of tax compliance

Tenderers shall be registered with the South African Revenue Service (SARS) and their tax affairs must be in order and they must be tax compliant subject to the requirements of clause 2.2.1.1.2.h. In this regard, it is the responsibility of the Tenderer to submit evidence in the form of a valid Tax Compliance Status PIN issued by SARS to the CCT at the Supplier Management Unit located within the Supplier Management / Registration Office, 2nd Floor (Concourse Level), Civic Centre, 12 Hertzog Boulevard, Cape Town (Tel 021 400 9242/3/4/5), or included with this tender. The tenderer must record its Tax Compliance Status PIN number on the **Details of Tenderer** pages of the tender submission.

Each party to a Consortium/Joint Venture shall submit a separate Tax Compliance Status Pin.

Before making an award the CCT must verify the bidder's tax compliance status. Where the recommended bidder is not tax compliant, the bidder should be notified of the non-compliant status and be requested to submit to the CCT, within 7 working days, written proof from SARS that they have made arrangement to meet their outstanding tax obligations. The proof of tax compliance submitted by the bidder must be verified by the CCT via CSD or e-Filing. The CCT should reject a bid submitted by the bidder if such bidder fails to provide proof of tax compliance within the timeframe stated herein.

Only foreign suppliers who have answered "NO" to all the questions contained in the Questionnaire to Bidding Foreign Suppliers section on the **Details of Tenderer** pages of the tender submission, are not required to register for a tax compliance status with SARS.

2.2.20 Compliance with Occupational Health and Safety Act, 85 of 1993

Tenderers are to note the requirements of the Occupational Health and Safety Act, 85 of 1993. The Tenderer shall be deemed to have read and fully understood the requirements of the above Act and Regulations and to have allowed for all costs in compliance therewith.

In this regard the Tenderer shall submit **upon written request to do so by the CCT**, a Health and Safety Plan in sufficient detail to demonstrate the necessary competencies and resources to deliver the goods or services all in accordance with the Act, Regulations and Health and Safety Specification.

2.2.21 Claims arising from submission of tender

By responding to the tender herein, the tenderer warrants that it has:

- a) Inspected the Specifications and read and fully understood the Conditions of Contract.
- b) Read and fully understood the whole text of the Specifications and Price Schedule and thoroughly acquainted himself with the nature of the goods or services proposed and generally of all matters which may influence the Contract.
- c) visited the site(s) where delivery of the proposed goods will take place, carefully examined existing conditions, the means of access to the site(s), the conditions under which the delivery is to be made, and acquainted himself with any limitations or restrictions that may be imposed by the Municipal or other Authorities in regard to access and transport of materials, plant and equipment to and from the site(s) and made the necessary provisions for any additional costs involved thereby.
- d) requested the CCT to clarify the actual requirements of anything in the Specifications and Price Schedule, the exact meaning or interpretation of which is not clearly intelligible to the Tenderer.
- e) Received any notices to the tender documents which have been issued in accordance with the CCT's Supply Chain Management Policy.

The CCT will therefore not be liable for the payment of any extra costs or claims arising from the submission of the tender

2.2.22 Collection and issuing of tender documents

The CCT will only issue tender documents through its Tender Distribution Office and/or the official CCT tender portal. Bidders who obtain documents through any means other than described herein, will not be known to the CCT and may thus not receive tender notices and addendums. Tenderers are not allowed to distribute tender documents to other potential bidders.

It is the responsibility of bidders who obtain documents through any means other than described herein, to notify the CCT tender representative thereof that they are participating in the tender. The CCT accepts no liability for any tender notices or addendums not reaching any bidders, who obtained documents through any means other than described herein or who provided incorrect contact details to the CCT."

2.3 The CCT's undertakings

2.3.1 Respond to requests from the tenderer

2.3.1.1 Unless otherwise stated in the Conditions of Tender, the CCT shall respond to a request for clarification received up to one week (where possible) before the tender closing time stated on the front page of the tender document.

2.3.1.2 The CCT's duly authorised representative for the purpose of this tender is stated on the General Tender Information page above.

2.3.2 Issue Notices

If necessary, the CCT may issue addenda in writing that may amend or amplify the tender documents to each tenderer during the period from the date the tender documents are available until one week before the tender closing time stated in the Tender Data. The CCT reserves its rights to issue addenda less than one week before the tender closing time in exceptional circumstances. If, as a result a tenderer applies for an extension to the closing time stated on the front page of the tender document, the CCT may grant such extension and, shall then notify all tenderers who drew documents.

Notwithstanding any requests for confirmation of receipt of notices issued, the tenderer shall be deemed to have received such notices if the CCT can show proof of transmission thereof via electronic mail, facsimile or registered post.

2.3.3 Opening of tender submissions

2.3.3.1 Unless the two-envelope system is to be followed, CCT shall open tender submissions in the presence of tenderers' agents who choose to attend at the time and place stated in the Conditions of Tender.

Tenders will be opened immediately after the closing time for receipt of tenders as stated on the front page of the tender document, or as stated in any Notice extending the closing date and at the closing venue as stated in the General Tender Information.

2.3.3.2 Announce at the meeting held immediately after the opening of tender submissions, at the closing venue as stated in the General Tender Information, the name of each tenderer whose tender offer is opened and, where possible, the prices indicated.

2.3.3.3 Make available a record of the details announced at the tender opening meeting on the CCT's website (<http://www.capetown.gov.za/en/SupplyChainManagement/Pages/default.aspx>.)

2.3.4 Two-envelope system

2.3.4.1 Where stated in the Conditions of Tender that a two-envelope system is to be followed, the CCT shall open only the technical proposal of tenders in the presence of tenderers' agents who choose to attend at the time and place stated in the Conditions of Tender and announce the name of each tenderer whose technical proposal is opened.

2.3.4.2 The CCT shall evaluate the quality of the technical proposals offered by tenderers, then advise

tenderers who have submitted responsive technical proposals of the time and place when the financial proposals will be opened. The CCT shall open only the financial proposals of tenderers, who have submitted responsive technical proposals in accordance with the requirements as stated in the Conditions of Tender, and announce the total price and any preference claimed. Return unopened financial proposals to tenderers whose technical proposals were non responsive.

2.3.5 Non-disclosure

The CCT shall not disclose to tenderers, or to any other person not officially concerned with such processes, information relating to the evaluation and comparison of tender offers and recommendations for the award of a contract, until after the award of the contract to the successful tenderer.

2.3.6 Grounds for rejection and disqualification

The CCT shall determine whether there has been any effort by a tenderer to influence the processing of tender offers and instantly disqualify a tenderer (and his tender offer) if it is established that he engaged in corrupt or fraudulent practices.

2.3.7 Test for responsiveness

2.3.7.1 Appoint a Bid Evaluation Committee and determine after opening whether each tender offer properly received:

- a) complies with the requirements of these Conditions of Tender,
- b) has been properly and fully completed and signed, and
- c) is responsive to the other requirements of the tender documents.

2.3.7.2 A responsive tender is one that conforms to all the terms, conditions, and specifications of the tender documents without material deviation or qualification. A material deviation or qualification is one which, in the CCT's opinion, would:

- a) Detrimentially affect the scope, quality, or performance of the goods, services or supply identified in the Specifications,
- b) Significantly change the CCT's or the tenderer's risks and responsibilities under the contract, or
- c) affect the competitive position of other tenderers presenting responsive tenders, if it were to be rectified.

Reject a non-responsive tender offer and not allow it to be subsequently made responsive by correction or withdrawal of any material deviation or qualification.

The CCT reserves the right to accept a tender offer which does not, in the CCT's opinion, materially and/or substantially deviate from the terms, conditions, and specifications of the tender documents.

2.3.8 Arithmetical errors, omissions and discrepancies

2.3.8.1 Check the responsive tenders for:

- a) The gross misplacement of the decimal point in any unit rate;
- b) Omissions made in completing the Price Schedule; or
- c) Arithmetic errors in:
 - i) line-item totals resulting from the product of a unit rate and a quantity in the Price Schedule; or
 - ii) The summation of the prices; or
 - iii) Calculation of individual rates.

2.3.8.2 The CCT must correct the arithmetical errors in the following manner:

- a) Where there is a discrepancy between the amounts in words and amounts in figures, the amount in words shall govern.
- b) If pricing schedules apply and there is an error in the line-item total resulting from the product of the unit rate and the quantity, the line-item total shall govern, and the rate shall be corrected. Where there is an obviously gross misplacement of the decimal point in the unit rate, the line-item total as tendered shall govern, and the unit rate shall be corrected.

- c) Where there is an error in the total of the prices either as a result of other corrections required by this checking process or in the tenderer's addition of prices, the total of the prices shall govern and the tenderer will be asked to revise selected item prices (and their rates if Price Schedules apply) to achieve the tendered total of the prices.

Consider the rejection of a tender offer if the tenderer does not correct or accept the correction of the arithmetical error in the manner described above.

2.3.8.3 In the event of tendered rates or lump sums being declared by the CCT to be unacceptable to it because they are not priced, either excessively low or high, or not in proper balance with other rates or lump sums, the tenderer may be required to produce evidence and advance arguments in support of the tendered rates or lump sums objected to. If, after submission of such evidence and any further evidence requested, the CCT is still not satisfied with the tendered rates or lump sums objected to, it may request the tenderer to amend these rates and lump sums along the lines indicated by it.

The tenderer will then have the option to alter and/or amend the rates and lump sums objected to and such other related amounts as are agreed on by the CCT, but this shall be done without altering the tender offer in accordance with this clause.

Should the tenderer fail to amend his tender in a manner acceptable to and within the time stated by the CCT, the CCT may declare the tender as non-responsive.

2.3.9 Clarification of a tender offer

The CCT may, after the closing date, request additional information or clarification from tenderers, in writing on any matter affecting the evaluation of the tender offer or that could give rise to ambiguity in a contract arising from the tender offer, which written request and related response shall not change or affect their competitive position or the substance of their offer. Such request may only be made in writing by the Director: Supply Chain Management using any means as appropriate.

2.3.10 Evaluation of tender offers

2.3.10.1 General

2.3.10.1.1 The CCT may reduce each responsive tender offer to a comparative price and evaluate them using the tender evaluation methods and associated evaluation criteria and weightings that are specified in the Conditions of Tender.

2.3.10.1.2 For evaluation purposes only, the effects of the relevant contract price adjustment methods will be considered in the determination of comparative prices as follows:

- a) If the selected method is based on bidders supplying rates or percentages for outer years, comparative prices would be determined over the entire contract period based on such rates or percentages.
- b) If the selected method is based on a formula, indices, coefficients, etc. that is the same for all bidders during the contract period, comparative prices would be the prices as tendered for year one.
- c) If the selected method is based on a formula, indices, coefficients, etc. that varies between bidders, comparative prices would be determined over the entire contract period based on published indices relevant during the 12 months prior to the closing date of tenders.
- d) If the selected method includes an imported content requiring rate of exchange variation, comparative prices would be determined based on the exchange rates tendered for the prices as tendered for year one. The rand equivalent of the applicable currency 14 days prior to the closing date of tender will be used (the CCT will check all quoted rates against those supplied by its own bank).
- e) If the selected method is based on suppliers' price lists, comparative prices would be the prices as tendered for year one.
- f) If the selected method is based on suppliers' price lists and / or rate of exchange, comparative prices would be determined as tendered for year one whilst taking into account the tendered percentage subject to rate of exchange (see sub clause (d) for details on the calculation of the rate of exchange).

2.3.10.1.3 Where the scoring of functionality forms part of a bid process, each member of the Bid Evaluation Committee must individually score functionality. The individual scores must then be interrogated and

calibrated if required where there are significant discrepancies. The individual scores must then be added together and averaged to determine the final score.

2.3.10.2 Decimal places

Score financial offers, preferences and functionality, as relevant, to two decimal places.

2.3.10.3 Scoring of tenders (price and preference)

2.3.10.3.1 Points for price will be allocated in accordance with the formula set out in this clause based on the price per item / rates as set out in the **Price Schedule (Section 7)**:

- Based on the sum of the prices/rates in relation to the estimated quantities.

2.3.10.3.2 Points for preference will be allocated in accordance with the provisions of **Preference Schedule** and the table in this clause.

2.3.10.3.3 The terms and conditions of **Preference Schedule** as it relates to preference shall apply in all respects to the tender evaluation process and any subsequent contract.

2.3.10.3.4 Applicable formula:

The 90/10 price/preference points system will be applied to the evaluation of responsive tenders above a Rand value of R50'000'000 (all applicable taxes included), whereby the order(s) will be placed with the tenderer(s) scoring the highest total number of adjudication points.

Price shall be scored as follows:

$$Ps = 90 \times \left(1 - \frac{(Pt - Pmin)}{Pmin} \right)$$

Where: Ps is the number of points scored for price;
 Pt is the price of the tender under consideration;
 Pmin is the price of the lowest responsive tender.

Preference points shall be based on the Specific Goal as per below:

Table B2: Awards above R50 mil (VAT Inclusive)

#	Specific Goals allocated points	Maximum Preference Points (90/10)
1	Promotion of Micro and Small Enterprises <i>Micro and Small as per National Small Enterprise Act, 1996 (Act No.102 of 1996)</i> <i>SME partnership, sub-contracting, joint venture or consortiums</i>	4
2	Enterprise Supplier Development and Socio-Economic Development <i>> 15% of total expenditure = 3 points</i> <i>> 10% up to 15% of total expenditure = 2 points</i> <i>>= 5% up to 10% of total expenditure = 1 points</i> <i>< 5% of total expenditure = 0 points</i>	3
3	Skills Development OR Employee Share Scheme	3
3.1	Skills Development <i>> 5% of total expenditure = 3 points</i> <i>> 3% up to 5% of total expenditure = 2 points</i> <i>>= 1% up to 3% of total expenditure = 1 points</i> <i>< 1% of total expenditure = 0 points</i>	
3.2	OR Employee Share Scheme <i>> 15% employee ownership = 3 points</i> <i>> 10% up to 15% employee ownership = 2 point</i> <i>>= 5% up to 10% employee ownership = 1 point</i> <i>< 5% employee ownership = 0 point</i>	
	Total points	10

2.3.10.5 Risk Analysis

Notwithstanding compliance with regard to any requirements of the tender, the CCT will perform a risk analysis in respect of the following:

- a) reasonableness of the financial offer
- b) reasonableness of unit rates and prices
- c) the tenderer's ability to fulfil its obligations in terms of the tender document, that is, that the tenderer can demonstrate that he/she possesses the necessary professional and technical qualifications, professional and technical competence, financial resources, equipment and other physical facilities, managerial capability, reliability, capacity, experience, reputation, personnel to perform the contract, etc.; the CCT reserves the right to consider a tenderer's existing contracts with the CCT in this regard
- d) any other matter relating to the submitted bid, the tendering entity, matters of compliance, verification of submitted information and documents, etc.

The conclusions drawn from this risk analysis will be used by the CCT in determining the acceptability of the tender offer.

No tenderer will be recommended for an award unless the tenderer has demonstrated to the satisfaction of the CCT that he/she has the resources and skills required.

2.3.11 Negotiations with preferred tenderers

The CCT may negotiate the final terms of a contract with tenderers identified through a competitive tendering process as preferred tenderers provided that such negotiation:

- a) Does not allow any preferred tenderer a second or unfair opportunity;
- b) Is not to the detriment of any other tenderer; and
- c) Does not lead to a higher price than the tender as submitted.

If negotiations fail to result in acceptable contract terms, the City Manager (or his delegated authority) may terminate the negotiations and cancel the tender or invite the next ranked tenderer for negotiations. The original preferred tenderer should be informed of the reasons for termination of the negotiations. If the decision is to invite the next highest ranked tenderer for negotiations, the failed earlier negotiations may not be reopened by the CCT.

Minutes of any such negotiations shall be kept for record purposes.

The provisions of this clause will be equally applicable to any invitation to negotiate with any other tenderers.

In terms of the CCT's SCM Policy, tenders must be cancelled in the event that negotiations fail to achieve a market related price with any of the three highest scoring tenderers.

2.3.12 Acceptance of tender offer

Notwithstanding any other provisions contained in the tender document, the CCT reserves the right to:

2.3.12.1 Accept a tender offer(s) which does not, in the CCT's opinion, materially and/or substantially deviate from the terms, conditions, and specifications of the tender document.

2.3.12.2 Accept the whole tender or part of a tender or any item or part of any item or items from multiple manufacturers, or to accept more than one tender (in the event of a number of items being offered), and the CCT is not obliged to accept the lowest or any tender.

2.3.12.3 Accept the tender offer(s), if in the opinion of the CCT, it does not present any material risk and only if the tenderer(s):

- a) is not under restrictions, has any principals who are under restrictions, or is not currently a supplier to whom notice has been served for abuse of the supply chain management system, preventing participation in the CCT's procurement,
- b) can, as necessary and in relation to the proposed contract, demonstrate that he or she possesses the professional and technical qualifications, professional and technical competence, financial resources, equipment and other physical facilities, managerial capability, reliability, experience and reputation, expertise and the personnel, to perform the contract,
- c) has the legal capacity to enter into the contract,
- d) is not insolvent, in receivership, under Business Rescue as provided for in chapter 6 of the Companies Act, 2008, bankrupt or being wound up, has his affairs administered by a court or a judicial officer, has suspended his business activities, or is subject to legal proceedings in respect of any of the foregoing, complies with the legal requirements, if any, stated in the tender data, and
- e) is able, in the opinion of the CCT, to perform the contract free of conflicts of interest.

If an award cannot be made in terms of anything contained herein, the CCT reserves the right to consider the next ranked tenderer(s).

2.3.12.4 The CCT reserves the right not to make an award, or revoke an award already made, where the implementation of the contract may result in reputational risk or harm to the CCT as a result of (inter alia):

- a) reports of poor governance or unethical behaviour, or both;
- b) association with known notorious individuals and family of notorious individuals;
- c) poor performance issues, known to the CCT;
- d) negative media reports, including negative social media reports;
- e) adverse assurance (e.g. due diligence) report outcomes; and

- f) circumstances where the relevant vendor has employed, or is directed by, anyone who was previously employed in the service of the state (as defined in clause 1.53 of the SCM Policy), where the person is or was negatively implicated in any SCM irregularity.

2.3.12.5 The CCT reserves the right to nominate an Standby bidder at the time when an award is made and in the event that a contract is terminated during the execution thereof, the CCT may consider the award of the contract, or non-award, to the Standby Bidder in terms of the procedures included its SCM Policy.

2.3.13 Prepare contract documents

2.3.13.1 If necessary, revise documents that shall form part of the contract and that were issued by the CCT as part of the tender documents to take account of:

- a) Notices issued during the tender period,
- b) Inclusion of some of the returnable documents, and
- c) Other revisions agreed between the CCT and the successful tenderer.

2.3.13.2 Complete the schedule of deviations attached to the form of offer and acceptance, if any.

2.3.14 Notice to successful and unsuccessful tenderers

2.3.14.1 Before accepting the tender of the successful tenderer the CCT shall notify the successful tenderer in writing of the decision of the CCT's Bid Adjudication Committee to award the tender to the successful tenderer. No rights shall accrue to the successful tenderer in terms of this notice

2.3.14.2 The CCT shall, at the same time as notifying the successful tenderer of the Bid Adjudication Committee's decision to award the tender to the successful tenderer, also give written notice to the other tenderers informing them that they have been unsuccessful.

2.3.15 Provide written reasons for actions taken

Provide upon request written reasons to tenderers for any action that is taken in applying these Conditions of Tender but withhold information which is not in the public interest to be divulged, which is considered to prejudice the legitimate commercial interests of tenderers or might prejudice fair competition between tenderers.

TENDER DOCUMENT GOODS AND SERVICES		 CITY OF CAPE TOWN ISIXEKO SASEKAPA STAD KAAPSTAD	
SUPPLY CHAIN MANAGEMENT			
SCM - 542	Approved by Branch Manager: February 2024	Version: 10	Page 101 of 80

TENDER NO: 51C/2026/27

TENDER DESCRIPTION: THE PROVISION OF PEOPLE, MANAGEMENT, LEADERSHIP DEVELOPMENT, ORGANISATIONAL DESIGN AND INNOVATION PROFESSIONAL SERVICES.

CONTRACT PERIOD: THIRTY-SIX (36) MONTHS FROM THE COMMENCEMENT DATE OF THE CONTRACT

THE CONTRACT

THE CITY OF CAPE TOWN	
A metropolitan municipality, established in terms of the Local Government: Municipal Structures Act, 117 of 1998 read with the Province of the Western Cape: Provincial Gazette 5588 dated 22 September 2000, as amended ("the Purchaser") herein represented by	
AUTHORISED REPRESENTATIVE	MONICA PREGNOLATO

AND

SUPPLIER	
NAME of Company/Close Corporation or Partnership / Joint Venture/ Consortium or Sole Proprietor /Individual (The "Supplier" / "tenderer")	
TRADING AS (if different from above)	
REGISTRATION NUMBER	
PHYSICAL ADDRESS / CHOSEN DOMICILIUM CITANI ET EXECTUANDI OF THE SUPPLIER	
AUTHORISED REPRESENTATIVE	
CAPACITY OF AUTHORISED REPRESENTATIVE	

(HEREINAFTER COLLECTIVELY REFERRED TO AS "THE PARTIES" AND INDIVIDUALLY A "PARTY")

NATURE OF TENDER OFFER (please indicate below)	
Main Offer (see clause 2.2.11.1)	
Alternative Offer (see clause 2.2.11.1)	

C.1 DETAILS OF TENDERER/SUPPLIER

1.1 Type of Entity (Please tick one box)

- ☐ Individual / Sole Proprietor
 ☐ Close Corporation
 ☐ Company
☐ Partnership or Joint Venture or Consortium
 ☐ Trust
 ☐ Other:

1.2 Required Details (Please provide applicable details in full):

Name of Company / Close Corporation or Partnership / Joint Venture / Consortium or Individual /Sole Proprietor	
Trading as (if different from above)	
Company / Close Corporation registration number (if applicable)	
Postal address	Postal Code _____
Physical address (Chosen Domicilium Citandi Et Executandi)	Postal Code _____
Contact details of the person duly authorised to represent the tenderer	Name: Mr/Ms _____ (Name & Surname) Telephone : (____) _____ Fax : (____) _____ Cellular Telephone: _____ E-mail address: _____
Income tax number	
VAT registration number	
SARS Tax Compliance Status PIN	
CCT Supplier Database Registration Number (See Conditions of Tender)	
National Treasury Central Supplier Database registration number (See Conditions of Tender)	
Is tenderer the accredited representative in South Africa for the Goods / Services / Works offered?	☐ Yes ☐ No If yes, enclose proof
Is tenderer a foreign based supplier for the Goods / Services / Works offered?	☐ Yes ☐ No If yes, answer the Questionnaire to Bidding Foreign Suppliers (below)
Questionnaire to Bidding Foreign Suppliers	a) Is the tenderer a resident of the Republic of South Africa or an entity registered in South Africa? ☐ Yes ☐ No
	b) Does the tenderer have a permanent establishment in the Republic of South Africa? ☐ Yes ☐ No
	c) Does the tenderer have any source of income in the Republic of South Africa? ☐ Yes ☐ No
	d) Is the tenderer liable in the Republic of South Africa for any form of taxation? ☐ Yes ☐ No
Other Required registration numbers	

C.2 FORM OF OFFER AND ACCEPTANCE

TENDER NO: 51C/2026/27 – The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services.

C.2.1 Offer (To Be Completed by the Tenderer as Part of Tender Submission)

The tenderer, identified in the offer signature table below,

HEREBY AGREES THAT by signing the *Form of Offer and Acceptance*, the tenderer:

1. confirms that it has examined the documents listed in the Index (including Schedules and Annexures) and has accepted all the Conditions of Tender;
2. confirms that it has received and incorporated any and all notices issued to tenderers issued by the CCT;
3. confirms that it has satisfied itself as to the correctness and validity of the tender offer; that the price(s) and rate(s) offered cover all the goods and/or services specified in the tender documents; that the price(s) and rate(s) cover all its obligations and accepts that any mistakes regarding price(s), rate(s) and calculations will be at its own risk;
4. offers to supply all or any of the goods and/or render all or any of the services described in the tender document to the CCT in accordance with the:
 - 4.1 terms and conditions stipulated in this tender document;
 - 4.2 specifications stipulated in this tender document; and
 - 4.3 at the prices as set out in the **Price Schedule**.
5. accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on it in terms of the Contract.

SIGNED AT _____ (PLACE) ON THE _____ (DAY) OF _____ (MONTH AND YEAR)

For and on behalf of the Supplier
(Duly Authorised)
Name and Surname:

Witness 1 Signature
Name and Surname:

Witness 2 Signature
Name and Surname:

INITIALS OF CCT OFFICIALS		
1	2	3

FORM OF OFFER AND ACCEPTANCE (continued)

TENDER NO: 51C/2026/27 – The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services.

C.2.2 Acceptance (To Be Completed by the CCT)

By signing this part of this *Form of Offer and Acceptance*, the CCT accepts the tenderer's (if awarded the Supplier's) offer. In consideration thereof, the CCT shall pay the Supplier the amount due in accordance with the conditions of contract. Acceptance of the Supplier's offer shall form an agreement between the CCT and the Supplier upon the terms and conditions contained in this document.

The terms of the agreement are contained in the Contract (as defined) including drawings and documents or parts thereof, which may be incorporated by reference.

Deviations from and amendments to the documents listed in the tender data and any addenda thereto as listed in the *Tender Returnable Documents* as well as any changes to the terms of the offer agreed by the tenderer and the CCT during this process of offer and acceptance, are contained in the *Schedule of Deviations* attached to and forming part of this *Form of Offer and Acceptance*. No amendments to or deviations from said documents are valid unless contained in the *Schedule of Deviations*.

The Supplier shall within 2 (two) weeks after receiving a complete, copy of the Contract, including the *Schedule of Deviations* (if any), contact the CCT to arrange the delivery of any securities, bonds, guarantees, proof of insurance and any other documents to be provided in terms the *Special Conditions of Contract*. Failure to fulfil any of these obligations in accordance with those terms shall constitute a repudiation / breach of the agreement.

Notwithstanding anything contained herein, this agreement comes into effect on the Commencement Date, being the date upon which the Supplier confirms receipt from the CCT of 1 (one) complete, signed copy of the Contract, including amendments or deviations contained in the *Schedule of Deviations* (if any).

For and on behalf of the City of Cape Town
(Duly Authorised)
Name and Surname:

Witness 1 Signature
Name and Surname:

Witness 2 Signature
Name and Surname:

FORM OF OFFER AND ACCEPTANCE (continued)

TENDER NO: 51C/2026/27 – The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services.

C.2.3 Schedule of Deviations (To be Completed by the CCT upon Acceptance)

Notes:

1. The extent of deviations from the tender documents issued by the CCT before the tender closing date, is limited to those permitted in terms of the conditions of tender.
2. A tenderer's covering letter shall not be included in the final Contract document. Should any matter in such letter, which constitutes a deviation as aforesaid, become the subject of agreements reached during the process of offer and acceptance, the outcome of such agreement shall be recorded here.
3. Any other matter arising from the process of offer and acceptance either as a confirmation, clarification or change to the tender documents and which it is agreed by the Parties to become an obligation of the Contract, shall be recorded here.
4. Any change or addition to the tender documents arising from the above agreements and recorded here, shall form part of the Contract.

1 Subject
Details

2 Subject
Details

3 Subject
Details

4 Subject
Details

By the duly authorised representatives signing this agreement, the CCT and the tenderer agree to and accept the foregoing schedule of deviations as the only deviations from and amendments to this tender document and addenda thereto as listed in the *Tender Returnable Documents*, as well as any confirmation, clarification or changes to the terms of the offer agreed by the tenderer and the CCT during this process of offer and acceptance.

It is expressly agreed that no other matter whether in writing, oral communication or implied during the period between the issue of the tender documents and the Commencement Date, shall have any meaning or effect between the Parties arising from the agreement.

FORM OF OFFER AND ACCEPTANCE (continued)

TENDER NO: 51C/2026/27 – The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services.

C.2.4 Confirmation of Receipt (To be Completed by Supplier upon Acceptance)

The Supplier identified in the offer part of the Contract hereby confirms receipt from the CCT of 1 (one) complete, signed copy of the Contract, including the *Schedule of Deviations* (if any) on:

The..... (Day)

Of..... (Month)

20..... (year)

At..... (Place)

For the Supplier: Signature(s)

Name(s)

Capacity

Signature and name of witness:

Signature Name

ONLY TO BE
COMPLETED AT
ACCEPTANCE STAGE

C.3 OCCUPATIONAL HEALTH AND SAFETY AGREEMENT

AGREEMENT MADE AND ENTERED INTO BETWEEN THE CCT (HEREINAFTER CALLED THE "CCT")
AND

.....,
(Supplier/Mandatory/Company/CC Name)

IN TERMS OF SECTION 37(2) OF THE OCCUPATIONAL HEALTH AND SAFETY ACT, 85 OF 1993 AS AMENDED.

I,, representing

....., as an employer
in its own right in its own right, do hereby undertake to ensure, as far as is reasonably practicable, that all work
will be performed, and all equipment, machinery or plant used in such a manner as to comply with the
provisions of the Occupational Health and Safety Act (hereafter "OHSA") and the Regulations promulgated
thereunder.

I furthermore confirm that I am/we are registered with the Compensation Commissioner and that all registration
and assessment monies due to the Compensation Commissioner have been fully paid or that I/We are insured
with an approved licensed compensation insurer.

COID ACT Registration Number:

OR Compensation Insurer: Policy No:

I undertake to appoint, where required, suitable competent persons, in writing, in terms of the requirements of
OHSA and the Regulations and to charge him/them with the duty of ensuring that the provisions of OHSA and
Regulations as well as the Council's Special Conditions of Contract, Way Leave, Lock-Out and Work Permit
Procedures are adhered to as far as reasonably practicable.

I further undertake to ensure that any subcontractors employed by me will enter into an occupational health
and safety agreement separately, and that such subcontractors comply with the conditions set.

I hereby declare that I have read and understand the Occupational Health and Safety Specifications contained
in this tender and undertake to comply therewith at all times.

I hereby also undertake to comply with the Occupational Health and Safety Specification and Plan submitted
and approved in terms thereof.

Signed aton the.....day of.....20....

Witness

Mandatory

Signed at..... on the.....day of.....20

Witness

for and on behalf of
CCT

C.4 PRICE SCHEDULE

Bid specifications may not make any reference to any particular trademark, name, patent, design, type, specific origin or producer, unless there is no other sufficiently precise or intelligible way of describing the characteristics of the work, in which case such reference must be accompanied by the words “or equivalent”.

TENDERERS MUST NOTE THAT WHEREVER THIS DOCUMENT REFERS TO ANY PARTICULAR TRADEMARK, NAME, PATENT, DESIGN, TYPE, SPECIFIC ORIGIN OR PRODUCER, SUCH REFERENCE SHALL BE DEEMED TO BE ACCOMPANIED BY THE WORDS ‘OR EQUIVALENT’

4.1 Part A: Design, development and delivery of Leadership Development Programmes – Content Development

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.1.1	Strategic and professional advisor i.e. organisational development professional and specialized content developer.	Per Hour	R	R	R
4.1.2	Senior Account Manager* general content development	Per Hour	R	R	R
4.1.3	Account Manager* general content development	Per Hour	R	R	R
4.1.4	Functional content specialist	Per Hour	R	R	R
4.1.5	Copy writer	Per Hour	R	R	R
4.1.6	Graphic Artist	Per Hour	R	R	R
4.1.7	Train the Trainer	Per Hour	R	R	R
4.1.8	Data Analyst	Per Hour	R	R	R
4.1.9	Close out report	Per report	R	R	R
4.1.10	Content Developer	Per Hour	R	R	R
4.1.11	Lead Content Developer	Per Hour	R	R	R

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.1.12	Learning Designer (or Instructional Designer)	Per Hour	R	R	R

4.2 Part A: Design, development and delivery of Leadership Development Programmes – Facilitation services

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.2.1	Provision of a Senior level leadership development facilitation service (Lead Facilitator)	Per delegate per day*	R	R	R
4.2.2	Provision of a leadership development facilitation service (Facilitator)	Per delegate per day*	R	R	R
4.2.3	Provision of a Functional Expert leadership development facilitation service	Per delegate per day*	R	R	R
4.2.4	Report Writer	Per Hour	R	R	R
4.2.5	Train the Trainer	Per Hour	R	R	R
4.2.6	Administrative and logistic assistant	Per Hour	R	R	R
4.2.7	Data Analyst	Per Hour	R	R	R
4.2.8	Close out report	Per report	R	R	R
4.2.9	Venue – minimum 12 and maximum 25 (As per specifications) *	Per day	R	R	R
4.2.10	Venue – minimum 26 up to maximum 50 (As per specifications) *	Per day	R	R	R
4.2.11	Venue – minimum 51 up to maximum 150 (As per specifications) *	Per day	R	R	R

4.2.12	Venue – minimum 151 up to maximum 300 (As per specifications) *	Per day	R	R	R
--------	---	---------	---	---	---

***The venue to be accessible within the Metropolitan Area of Cape Town.**

Catering will be charged as per the CCT policy on catering which may be amended from time to time. See more details in C.5 Specification/s.

4.3 Part B: Organisational Development Interventions Design and Facilitation

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.3.1	Strategic and professional advisor i.e. organisational development professional	Per Hour	R	R	R
4.3.2	Senior Account Manager* – general content development	Per Hour	R	R	R
4.3.3	Account Manager* –general content development	Per Hour	R	R	R
4.3.4	Functional content specialist	Per Hour	R	R	R
4.3.5	Copy writer	Per Hour	R	R	R
4.3.6	Creative writer	Per Hour	R	R	R
4.3.7	Lead Facilitator	Per delegate per day*	R	R	R
4.3.8	Provision of a facilitation service (Facilitator)	Per delegate per day*	R	R	R
4.3.9	Provision of a Functional Expert facilitation service	Per delegate per day*	R	R	R
4.3.10	Provision of a Facilitator	Per delegate per day*	R	R	R
4.3.11	Agile Facilitator – provision of a specialised facilitation service	Per Hour	R	R	R
4.3.12	Lean Management Facilitator – provision of a specialised facilitation service	Per Hour	R	R	R

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.3.13	Design Thinking Facilitator – provision of a specialised facilitation service	Per Hour	R	R	R
4.3.14	Report Writer	Per Hour	R	R	R
4.3.15	Train the Trainer	Per Hour	R	R	R
4.3.16	Administrative and logistic assistant	Per Hour	R	R	R
4.3.17	Data Analyst	Per Hour	R	R	R
4.3.18	Close out report	Per report	R	R	R
4.3.19	Venue – Up to maximum 25 (As per specifications)*	Per day	R	R	R
4.3.20	Venue – minimum 26 up to maximum 50 (As per specifications)*	Per day	R	R	R
4.3.21	Venue – minimum 51 up to maximum 150 (As per specifications)*	Per day	R	R	R

***Venue to be accessible within the Metropolitan Area of Cape Town.**

Catering will be charged as per the CCT policy on catering which may be amended from time to time. See more details in C.5 Specification/s.

4.4 Part C: Organisational Effectiveness & Innovation Functional Expertise

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.4.1	Provision of a Lead Functional Expert (thought leadership, masterclasses, strategic content sessions)	Per Key Note Address	R	R	R
4.4.2	Provision of a Lead Functional Expert (thought leadership, masterclasses, strategic content sessions)	Per Half Day Session	R	R	R
4.4.3	Provision of a Lead Functional Expert (thought leadership, masterclasses, strategic content sessions)	Per Full Day Session	R	R	R
4.4.4	Provision of Functional Expert (specialist training, enterprise learning facilitation)	Per Half Day Session	R	R	R
4.4.5	Provision of Functional Expert (specialist training, enterprise learning facilitation)	Per Full Day Session	R	R	R
4.4.6	Provision of Specialist Content Facilitator (content-led engagement & learning bursts)	Per Half Day Session	R	R	R
4.4.7	Provision of Specialist Content Facilitator (content-led engagement & learning bursts)	Per Full Day Session	R	R	R
4.4.8	Graphic Artist – development of expert-led learning materials, visual content, infographics	Per Hour	R	R	R
4.4.9	Administrative & Logistical Assistant – session coordination, scheduling, virtual support	Per Hour	R	R	R
4.4.10	Venue (0–50 delegates) – as per specifications	Per Hour	R	R	R
4.4.11	Venue (51-99 delegates) – as per specifications	Per Hour	R	R	R
4.4.12	Venue (100–199 delegates) – as per specifications	Per Hour	R	R	R
4.4.13	Venue (200–300 delegates) – as per specifications	Per Hour	R	R	R

***Venue to be accessible within the Metropolitan Area of Cape Town.**

Catering will be charged as per the CCT policy on catering which may be amended from time to time. See more details in C.5 Specification/s.

4.5 PART D: Employee and Leadership - 360 Degree Feedback tool

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.5.1	Professional advisory service example: organisational development specialist organisational psychologist	Per Hour	R	R	R
4.5.2	Key Account Manager*	Per Hour	R	R	R
4.5.3	Account Manager*	Per Hour	R	R	R
4.5.4	Data Analyst	Per Hour	R	R	R
4.5.5	Business Analyst	Per Hour	R	R	R
4.5.6	Systems Development Specialist	Per Hour	R	R	R
4.5.7	Assessment Report writer	Per Hour	R	R	R
4.5.8	360 degree assessment reports (Individual)	Per Report	R	R	R
4.5.9	360 degree assessment reports (team)	Per Report	R	R	R
4.5.10	Training on 360 degree assessment feedback session and integration and input to personal development plan (based on 360 development assessments and using the City's PDP template)	Per Person	R	R	R

4.6 Part E: Change Management, Change Leadership Development and Establishing a Change Network

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.6.1	Senior Change Manager	Per Hour	R	R	R
4.6.2	Change Manager	Per Hour	R	R	R
4.6.3	Senior Communications Manager	Per Hour	R	R	R
4.6.4	Communications Manager	Per Hour	R	R	R
4.6.5	Senior Change Analyst	Per Hour	R	R	R
4.6.6	Change Analyst	Per Hour	R	R	R
4.6.7	Engagement Manager	Per Hour	R	R	R
4.6.8	Facilitator	Per Hour	R	R	R
4.6.9	Venue – minimum 12 and maximum 25 (As per specifications)*	Per Day	R	R	R
4.6.10	Venue – minimum 26 up to maximum 50 (As per specifications)*	Per Day	R	R	R
4.6.11	Venue – minimum 12 and maximum 25 (As per specifications)*	Half Day (i.e. up to 4 hrs)	R	R	R
4.6.12	Venue – minimum 26 up to maximum 50 (As per specifications)*	Half Day (i.e. up to 4 hrs)	R	R	R

*Venue to be accessible within the Metropolitan Area of Cape Town.

Catering will be charged as per the CCT policy on catering which may be amended from time to time. See more details in C.5 Specification/s. Catering only applicable to Full Day training and not Half Day training.

4.7 Part F: Professional Services for Talent Management and Developmental Assessments

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.7.1	Senior Talent Management Consultant	Per Hour	R	R	R
4.7.2	Talent Management Consultant	Per hour	R	R	R
4.7.3	Organisational Psychologist	Per Hour	R	R	R
4.7.4	Account Manager	Per Hour	R	R	R
4.7.5	Facilitation of Talent Review Session	Per session	R	R	R
4.7.6	Development of Talent Profiles	Per Profile	R	R	R
4.7.7	Preparation of Line-Manager Packs	Per Pack	R	R	R
4.7.8	Training Workshop for OD/HR employees on Talent Forum Facilitation and Talent Engagement	Per Hour	R	R	R
4.7.9	Training Workshop for Line Managers on Talent and Career Engagement	Per workshop	R	R	R
4.7.10	Integrated Talent Development Assessment	Per individual	R	R	R
4.7.11	Generation of Individual Interpretive in-depth reports	Per report	R	R	R
4.7.12	Generation of Individual Interpretive basic reports	Per report	R	R	R
4.7.13	Line Manager Report	Per report	R	R	R
4.7.14	Development of Individual Succession Profiles	Per report	R	R	R
4.7.15	Consolidated Talent Insights and Successor Readiness Report (organisation-wide)	Per report	R	R	R

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.7.16	Digital Enablement Profile	Per user profile	R	R	R

4.8 Part G: Integrated People Management, Business Improvement and Organisational Design solutions

Item No.	Description	Unit	Price Per Unit (VAT Exclusive)		
			Year 1	Year 2	Year 3
4.8.1	Senior HC Advisory Consultant	Per Hour	R	R	R
4.8.2	HC Advisory Consultant	Per Hour	R	R	R
4.8.3	Project Manager	Per Hour	R	R	R
4.8.4	Senior Project Manager	Per Hour	R	R	R
4.8.5	Business Analysts	Per Hour	R	R	R
4.8.6	Senior Business Analysts	Per Hour	R	R	R
4.8.7	Strategy & Transformation Specialist	Per Hour	R	R	R
4.8.8	Senior Organisational Design Practitioner	Per Hour	R	R	R
4.8.9	Organisational Design Practitioner	Per Hour	R	R	R
4.8.10	Lean Six Sigma Consultant	Per Hour	R	R	R
4.8.11	Senior Lean Six Sigma (Black Belt) Specialist	Per Hour	R	R	R
4.8.12	Information Specialist	Per Hour	R	R	R
4.8.13	Senior Information Analyst	Per Hour	R	R	R

4.8.14	Information Analyst	Per Hour	R	R	R
4.8.15	Data Specialist	Per Hour	R	R	R
4.8.16	Senior Data Analyst	Per Hour	R	R	R
4.8.17	Data Analyst	Per Hour	R	R	R
4.8.18	Senior Analyst	Per Hour	R	R	R
4.8.19	Analyst	Per Hour	R	R	R
4.8.20	Research Specialist	Per Hour	R	R	R
4.8.21	Lead Researcher	Per Hour	R	R	R
4.8.22	Researcher	Per Hour	R	R	R

4.9 Part H: Innovation Management Services

No.	Description	Unit	Price in Rands (VAT Exclusive)		
			Year 1	Year 2	Year 3
	INNOVATION MANAGEMENT				
	Development of Innovation Strategy & Implementation Plan <i>(Including research, workshop facilitation and consolidation of input)</i>				
4.9.1	Innovation strategy Development	per strategy document	R	R	R
4.9.2	Innovation Implementation plan	per implementation plan	R	R	R
4.9.3	Integrated Innovation Strategy Presentation	per presentation	R	R	R
	Development of Innovation Case Studies <i>(Including conducting interviews, bringing in an innovation lens, the design of the case study and printing of e-copy and/or hard copy of the case study)</i>				
4.9.4	Development of Innovation Case Studies	per case study	R	R	R
4.9.5	Innovation Case study design and publishing of e-copy	per design	R	R	R

4.9.6	Innovation Case study print-out	per printed copy	R	R	R
4.9.7	Profile and Showcase Innovation	Per showcase intervention	R	R	R
	Innovation Programmes <i>(Including development of content, integration with the idea management platform, facilitation and coordination of logistics)</i>				
4.9.8	Development of content for interventions/ training programmes	Per intervention/ training	R	R	R
4.9.9	Innovation Training Intervention	per training programme	R	R	R
4.9.10	Innovation themed think-tank/ dialogue/workshop	per intervention	R	R	R
4.9.11	Innovation Campaign	per campaign	R	R	R
	Innovation Capability/Maturity Index Measure <i>(Including survey, focus group discussions, integration with the innovation strategy and implementation plan)</i>				
4.9.12	Conduct an Innovation Capability/Maturity index survey across City Directorates/ Departments	per survey	R	R	R
4.9.13	Implementation of ISO Innovation Management Standards	Per implementation	R	R	R
4.9.14	Facilitation of Certification of ISO Innovation Management Standards	Per certification	R	R	R
4.9.15	Integration report with the innovation strategy and implementation plan	per report	R	R	R
4.9.16	Integration presentation	per presentation	R	R	R

Pricing Instructions:

- 4.10.1 State the rates and prices in Rand unless instructed otherwise in the Conditions of Tender.
- 4.10.2 Include in the rates, prices, and the tendered total of the prices (if any) all duties, taxes (except Value Added Tax (VAT), and other levies payable by the successful tenderer, such duties, taxes and levies being those applicable 14 days before the closing time stated in the General Tender Information.
- 4.10.3 All prices tendered must include all expenses, disbursements and costs (e.g. transport, accommodation etc.) that may be required for the execution of the tenderer's obligations in terms of the Contract, and shall cover the cost of all general risks, liabilities and obligations set forth or implied in the Contract as well as overhead charges and profit (in the event that the tender is successful). All prices tendered will be final and binding.
- 4.10.4 All prices shall be tendered in accordance with the units specified in this schedule.
- 4.10.5 Where a value is given in the Quantity column, a Rate and Price (the product of the Quantity and Rate) is required to be inserted in the relevant columns.
- 4.10.6 The successful tenderer is required to perform all tasks listed against each item. The tenderer must therefore tender prices/rates on all items as per the section in the Price Schedule. **An item against which no rate is/are entered, or if anything other than a rate or a nil rate (for example, a zero, a dash or the word "included" or abbreviations thereof) is entered against an item, it will also be regarded as a nil rate having been entered against that item, i.e. that there is no charge for that item. The Tenderer may be requested to clarify nil rates, or items regarded as having nil rates; and the CCT may also perform a risk analysis with regard to the reasonableness of such rates.**
- 4.10.7 Provide fixed rates and prices for the duration of the contract that are not subject to adjustment except as otherwise provided for in clause 17 of the Conditions of Contract and as amplified in the Special Conditions of Contract.
- 4.10.8 The tender has nine Parts namely A, B, C, D, E, F, G, H, I and **bidders may tender for any part(s) they are competent in but must ensure that they price for all the items for the selected Part(s) for the full duration of the tender (Years 1, 2 and 3).** Please ensure you state clearly and specifically, for which parts and services of the tender you are responding to. Failure to put all rates/prices for any chosen part will deem tenderer non-responsive
- 4.10.9 The City of Cape reserves the right to award this tender per individual parts to the highest ranked responsive tenderer (per Part) -The main tenderer .
- 4.10.10The City of Cape reserves the right to award this tender per individual parts to the second and third highest ranked responsive tenderer (per Part) - The alternative tenderers. The City cannot guarantee work to the alternative tenderers for the duration of the contract.
- 4.10.11As per Cost Containment regulations, Tenderers that are successful in the functionality scoring phase would be required, upon request from the CCT, to provide a cost break-down per service item particularly with respect to such service items where an "all-inclusive" costing is required. Service Providers will not be allowed to include a category for "contingencies" in their cost break-down.

INITIALS OF CCT OFFICIALS		
1	2	3

C.5 SPECIFICATION(S)

Bid specifications may not make any reference to any trademark, name, patent, design, type, specific origin or producer, unless there is no other sufficiently precise or intelligible way of describing the characteristics of the work, in which case such reference must be accompanied by the words “or equivalent”.

OHAS note: The tender specification must include a section that deals with occupational health and safety, and which must specifically indicate any risks/dangers in respect of the goods or services to be procured, to enable tenderers to formulate an appropriate health and safety plan to submit upon request to do so.

The specification shall not contain any provisions which contradict or are already contained in the GCC and SCC.

The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services.

5.1 Context

The Organisational Effectiveness and Innovation (OE&I) Department exists to enable and strengthen organisational effectiveness by offering strategic advice and driving implementation of identified strategic initiatives to ultimately support the organisation in becoming a City of Hope.

The Department, through the various projects and programmes operates as a centre of excellence for Organisational Effectiveness and Innovation. The Department strives to continuously deliver on continuous improvement initiatives, enabling a culture of innovation, diversity and inclusion, embedding leadership practices and ensuring that equitable processes are in place to enhance employee behaviour with the aim of attracting and retaining key talent. These initiatives are designed to facilitate the creation of an enabling culture where our people display behaviours that will ultimately produce a capable and collaborative City government which is modernised, financially healthy, administratively efficient, and future-focused while prioritising service delivery. In addition, this will lead to our communities experiencing the City of Cape Town as the easiest place to conduct business and where our employees offer an outstanding service experience which is reflective of high levels of engagement, motivation, competence and superior performance.

The Organisational Effectiveness and Innovation Department (OE&I) partners and supports the organisation in its strategy implementation in a manner that provides real value and impact to City Directorates and Departments. The department leads and drives behavioural changes required at all levels of the organisation to achieve the objectives set in its strategic journey and intent. Ultimately the department must contribute to the City meeting its strategic objectives and delivering key initiatives to prepare the City for future challenges and opportunities. This ultimately aligns to building and embedding the desired culture of innovation, high performance, collaboration and capability amongst our people to improve the delivery of services and reflect the vision of the City of Hope as articulated in the IDP (2022 – 2027) and beyond.

5.1.1 The Organisational Effectiveness and Innovation (OE&I) Department within the City of Cape Town

The Department exists to provide strategic advisory and expert services on People, Processes and Transformation matters while partnering and supporting the organisation in behavioural changes needed for strategy implementation to meet the vision of being a City of Hope. This is achieved via the alignment of our services with the IDP Enabling Activities of People Development and City Optimisation and Innovation.

To deliver on these activities the department leads and drives the development of frameworks to create an efficient and enabling environment and culture so that our residents experience the City of Cape Town as the easiest place to conduct business and where our employees offer an outstanding service which is reflective of high levels of engagement, motivation and superior performance.

The OE&I department has four core functions:

1. Innovation and Customer Insights (ICI)

The purpose of the Innovation and Customer Insights (ICI) Branch is to integrate and accelerate the adoption of innovative practices within the organisation while placing focus on the external customer. The ICI branch conducts various innovation initiatives which engage with internal, external and innovation ecosystem stakeholders to support:

- Anticipating and managing future challenges that the City may face
- Improving service delivery
- Improving resident experiences
- Driving socio-economic impact

2. Business Improvement and Organisational Design

The branch delivers measurable improvements by implementing cost-saving, revenue-enhancing, and service delivery initiatives across the City directorates. Using industry's best practices, the branch applies continuous improvement and organisational design methodologies to ensure sustainable and impactful outcomes. This includes streamlining the City's processes and systems and aligning organisational structures to strategic objectives. These initiatives are designed to produce tangible results that directly benefit the organisation and the community it serves.

3. Diversity

The branch aims to transform the City as a workplace by providing strategic direction and enabling line departments to create a culture of diversity and inclusiveness. This is to ensure a continuous and developmental ethos of inclusivity for all, emphasising diversity as a benefit for organisational performance.

4. Organisational Development

The branch gives effect to the enabling activity of People Development via the People Strategy. The branch plays a pivotal role in improving the effectiveness of the organisation via the following focus areas: organisational culture and change, embedding the behaviours associated with the City values, driving the strategies, tools and resources of the Leadership Development and People Management frameworks including Strategic Workforce Planning, Succession Planning and leadership development programmes, to create a compelling Employee Value Proposition (EVP) to position the City as an Employer of Choice.

5.2 Scope of Work for this tender

The purpose of this tender is to invite service providers who have the requisite skills, experience and expertise to provide a suite of services, products and skill sets in support of various projects, programmes, workshops, initiatives or interventions within the Organisational Effectiveness and Innovation Department.

The services required must consider the following functions that reside within Organisational Effectiveness and Innovation and use this information to provide context to their submission(s):

5.2.1. Organisational culture

The focus is on embedding the City Values to enable a shift in culture to one where employees provide outstanding service to all customers and demonstrate innovative techniques to resolve problems in a collaborative manner. In addition, this area of Organisational Effectiveness and Innovation supports the driving

key initiatives relating to the City's Employee Value Proposition including providing input on City culture impact to the development of attraction, engagement and retention strategies to create a City Brand where the City become an Employer of Choice in regionally, nationally and even internationally. The City therefore subscribes to organisational culture as being the shared system of values, beliefs, assumptions, and norms that govern how people behave, interact, and make decisions within an organisation.

5.2.2 Development of Leadership Capabilities:

Building organisational capabilities and specifically leadership capabilities is a critical area of attention when building a service delivery strategy and ensuring the City has the best skill sets to meet the demands of that strategy. The management of our leadership talent will give the City the edge to enable the required change to the culture of the City.

In support of effective leadership practice, leadership capabilities are invested in as the integrated ways of thinking, behaving, and applying skills that enable individuals to lead effectively. They distinguish those who are ready to take on leadership responsibility from those who are still developing, and they underpin a leader's ability to make sound decisions, influence others, and achieve sustainable outcomes. For aspiring leaders, leadership capabilities indicate readiness and potential. For current leaders, they represent areas of ongoing application, refinement and growth.

Leadership development initiatives delivered under this scope support the institutionalisation of the City's leadership development framework by enabling consistent leadership capability development and application across the organisation, aligned to the City's People Strategy and service delivery objectives. Leadership development programmes and interventions will be aimed at building a caliber of leadership at multiple levels in the organisation.

All leadership development programmes will be governed by the following overarching principles:

- To build an institution of capable, values-based leaders at all levels that will translate into an organisational culture of high performance, openness, collaboration and innovation where service delivery is paramount
- To build a culture where leaders will collaborate to move the City to greater levels of performance and delivery
- To develop leaders who create a culture where it is acceptable to test innovative methods and solutions to ensure improved service delivery and achieve results
- To build leaders who are adaptive and lead with resilience

5.2.3 Change Management, Change Leadership Development and Establishing a Change Network

As the City continues its journey to becoming the City of Hope, it is committed to optimising future ways of working that enable optimal service delivery and foster hope within our communities. Optimisation introduces continual shifts across systems, processes and behaviours, creating an environment in which employees and teams must constantly adapt. To successfully navigate this evolving landscape, the City must strengthen its change management capability, enabling leaders, line managers and operational areas proactively plan for, manage, and minimise the disruption associated with change through deliberate, structured approaches.

Achieving transformational change also requires ongoing change leadership development to equip leaders at all levels with the skills, confidence, and mindset needed to serve as visible change advocates. By building leadership capacity in areas such as change sponsorship, communication, engagement, and modelling desired behaviours, the City aims to cultivate leaders who not only articulate the vision for change but also actively drive and sustain it through their actions and daily decision-making.

In addition, the City seeks to embed organisation-wide change adaptability by establishing strong and active change networks. This includes developing a resilient culture in which employees understand both the human and practical dimensions of change, supported by empowered change champions and agents who act as influencers, communicators, and feedback conduits. By mobilising this network, the City can reinforce change

at scale, strengthen employee resilience, and accelerate the embedding of new ways of working across all directorates and service areas.

5.2.4 Team Enablement

To effectively enable an organisational culture that is **performance and results based** as well as being solution and customer focused, teams within the City are required to operate **collaboratively across multiple departments** and branches. This requires **teams to work cohesively from the outset with each member respecting different styles of work** as well as diversity of culture, thinking and application.

The Organisational Development team supports the process of **analysing team effectiveness and facilitating conversations with teams to enable high performing teams**. This includes the use of psychometric assessment instruments in support of individuals and teams to understand how best to drive desired workplace behaviour based on information evident in personal and team profile reports.

5.2.5 Talent Management

Talent Management in the City of Cape Town forms part of the broader **People Strategy** and is a key enabler of organisational effectiveness, leadership continuity, and workforce sustainability. The City's approach focuses on attracting, developing, engaging, and retaining high-performing and high-potential employees to ensure that critical roles are effectively filled and the organisation remains future-ready. The People Management framework supports:

- **Strategic Workforce Planning** – identifying current and future workforce needs and aligning talent to organisational priorities.
- **Operational Workforce Planning** – Identifying current and short-term operational resource requirements and align these to staffing plans
- **Succession Planning** – building a sustainable pipeline of capable employees ready to assume key and scarce-skill roles.
- **Talent Reviews and Forums** – structured engagements between management and HR to assess performance, potential, and readiness across all directorates.
- **Developmental Assessments** – evaluating leadership capability, behavioural strengths, and development areas to inform personal development plans.
- **Leadership and Career Development** – targeted interventions and learning programmes that strengthen leadership capacity and career progression opportunities.
- **Employee Engagement and Retention** – fostering a high-performance, values-driven culture that encourages continuous growth and commitment to public service.
- The **development of all talent solutions and enabling mechanisms** such as the design and development of career streams, role profiles, diagnosing job content, job analysis, job design and benchmarking of job families to address organisational design and optimisation initiatives
- **The implementation of such talent solutions including the design of role profiles, career progression pathways, and job descriptions aligned to the City's and legislative requirements.**

Integral to **enabling** the collation of such **talent outcomes** is the provision of an integrated solution which is accessible via an electronic platform for ease of access.

Through these processes, the City aims to ensure that **the right people are in the right roles at the right time**, enabling the delivery of quality services to residents while supporting the long-term vision of a **future-fit, high-performing municipal workforce**.

5.2.6 Business Improvement and Organisational Design

The Business Improvement and Organisational Design function supports the City in enhancing organisational performance by improving the way work is performed and ensuring that organisational structures are aligned to strategic and service delivery objectives. The function focuses on identifying opportunities to optimise processes, systems, resources and operating models to improve efficiency, effectiveness and customer outcomes.

Business Improvement initiatives apply methodologies such as Lean Six Sigma, business process analysis and operational excellence to review and redesign business processes, eliminate inefficiencies, optimise resource utilisation, and identify opportunities for cost savings, revenue enhancement and improved service delivery. Organisational Design complements this by developing and reviewing target operating models, organisational structures, governance frameworks, job architecture and workforce capability requirements to ensure that the organisation is appropriately configured to deliver on its strategic priorities.

The Branch utilises multidisciplinary teams comprising Industrial Engineers, Business Improvement and Lean Six Sigma specialists, and Organisational Design practitioners to undertake diagnostic reviews, develop integrated solutions, and support the implementation of transformation initiatives across the City. The use of digital platforms and predictive analytics further enables evidence-based decision-making, organisational modelling, scenario planning and the optimisation of people, processes and technology to achieve higher levels of organisational performance and sustainability.

5.2.7 Innovation

The Innovation function enables the City to build and sustain an organisation-wide culture of innovation that supports continuous improvement, future readiness, and enhanced service delivery. Guided by the City's Innovation Framework, the function provides a structured and systematic approach to fostering creative thinking, encouraging calculated risk-taking, and supporting the development and implementation of new ideas that create value for the organisation and the communities it serves.

The function works across all Directorates to embed innovation as a core organisational capability by promoting collaboration, experimentation, and knowledge sharing. It facilitates a range of innovation platforms, programmes and methodologies, including Design-Led Thinking, Innovation Circles, Future Cities Dialogues, collaborative idea campaigns and innovation challenges, to help employees and leaders identify opportunities, solve complex problems, and translate ideas into practical solutions.

Aligned to the principles of the ISO 56002 Innovation Management System, the Innovation function strengthens leadership, capability building, innovation operations, evaluation and continuous improvement. It engages internal and external stakeholders, including the broader innovation ecosystem, to identify emerging trends, exploit new insights, and support the City's digital, urban, social and economic innovation priorities. By connecting people, ideas, technology and partnerships, the Innovation function helps to build a resilient, adaptive and future-focused organisation that is equipped to anticipate change, embrace new opportunities, and continuously improve the way the City works and delivers services.

5.2.8 Diversity

The Diversity function enables the City to foster an inclusive, respectful and equitable workplace where diversity is recognised as a strategic enabler of organisational performance, employee engagement and service delivery excellence. The function provides strategic direction, specialist advice and practical interventions to support the development of a workplace culture where all employees can contribute, develop and thrive.

Diversity plays a pivotal role in strengthening organisational cohesion, inclusion maturity and employee wellbeing through the following focus areas:

- Embedding inclusive leadership behaviours and building diversity capability across the organisation.
- Enabling proactive, restorative and preventative approaches to diversity-related challenges and workplace inclusion.
- Supporting the implementation and monitoring of Employment Equity objectives in partnership with line departments
- Facilitating transversal collaboration, developing and delivering targeted diversity and awareness programmes that promote understanding, belonging and respect for difference.
- Promoting the integration of diversity principles into organisational policies, people practices and workplace initiatives.
- Building internal capability and awareness through education, engagement, dialogue and partnerships that strengthen an inclusive organisational culture.

Through a continuous and developmental approach, the Diversity function works collaboratively across the organisation to create an environment where inclusion is embedded in everyday leadership and decision-

making, positioning diversity as a strategic driver of innovation, employee experience, organisational resilience and long-term success.

5.3 FUNCTIONAL SPECIFICATIONS

5.3.1 Part A: Design, development and delivery of Leadership Development Programmes - Content development

The City of Cape Town requires the design of **bespoke Leadership Development Programme content** applicable across **three distinct leadership levels** within a **large, complex metropolitan organisation**. It is about the ability to design leadership development content for **all three leadership levels**. **Failure to do so will render the tender non-responsive for this part.**

Leadership Levels

Leadership development programmes must be designed for the following four leadership levels:

1. **Supervisory / Team Level** (TASK level T13 and below)
2. **Heads and Management Level** (TASK level T14–T19)
3. **Senior Leadership Level** (TASK level T19–T25)

TASK level refers to levels of work as per the TASK (Tuned Assessments of Skills and Knowledge) job evaluation system applicable in local government and in the instance of the City of Cape Town, a level 10 metropolitan municipality. Note that although the City of Cape Town context lies in the TASK process, it is not implied that the tenderer must only have local government experience. Broader private / public sector on national / international level would be preferred to ensure most relevant benchmarked content.

Leadership development programmes may also include **elected councillors** responsible for leadership of governance structures, including **Mayoral Committee Members, Sub-Council Chairpersons, and Chairpersons of selected Council Committees**, where applicable. The development of the content for such programmes will be contracted with the successful tenderer as these are normally bespoke to ensure alignment with the roles of the elected officials.

Organisational Context

All leadership development content must be suitable for use within **large, complex organisational environments comparable to the City of Cape Town**, defined as organisations that:

- employ **3 000 or more employees**;
- comprise **multiple business units or divisions**;
- operate across **several functional and/or geographic areas**; and
- have leadership structures characterised by **wide spans of control and multiple reporting lines**.

1. Content Development Requirements

The service provider must research, conceptualise, and design **bespoke leadership development content** across all three leadership levels. This includes:

- development of a **content design methodology and approach** applicable across leadership levels;
- development of a **programme architecture** showing clear differentiation in depth, complexity, outcomes, and capability focus for each leadership level;
- use of **leadership assessments and diagnostic tools** to inform content design;
- design of appropriate **learning methodologies**, including but not limited to:
 - case studies;
 - experiential and action learning;
 - scenario analysis and simulations;
 - reflective learning; and
 - blended, online, virtual, and hybrid approaches;
- development of materials and content that support **sustainable leadership development**.
- **Sustainable leadership development** refers to content designed to create **lasting behaviour change**, long-term capability development, and continuity of leadership effectiveness across organisational cycles.

Additional requirements include:

- integration of **modern learning trends**, including neuroscience-informed learning where appropriate;
- development of **toolkits, online resources, practical action-learning tools, case studies, and leadership aids**; and
- curriculum design that is **outcomes-driven and aligned to the City's strategic context**.

- **Outcomes-driven content** refers to design anchored in clearly defined leadership behaviours, decision-making capability, and observable performance outcomes aligned to the City's strategy, culture, and values.
- All content must be designed to **support facilitation by both internal and external facilitators**.

2. Organisational Context and Leadership Philosophy

The service provider must demonstrate the ability to design content that:

- reflects the link between **leadership, organisational context, and organisational culture**;
- aligns with principles of **conscious and values-based leadership**; and
- supports a **metropolitan governance environment**, including leadership capability relating to:
 - change leadership;
 - decision-making;
 - collaboration;
 - resilience;
 - governance and ethical leadership;
 - team performance; and
 - dialogue and feedback skills.

3. Programme Structure Requirements

- The service provider must design leadership development programmes that include:
- modules ranging from **one (1) to five (5) consecutive working days**;
- multi-module programmes structured over **one (1) to three (3) years**; and
- a full specification of **programme structure**, including the number of modules, duration, sequencing, and overall programme flow.

4. Measurement Framework Requirements (Content Effectiveness)

- The service provider must design a **measurement framework** that clearly distinguishes between **content effectiveness** and **implementation success**

The framework must include:

- **pre- and post-assessments** conducted within **12–18 months** of programme completion;
- tools capable of measuring:
 - content effectiveness (relevance, clarity, insight, pre/post perception shifts);
 - implementation success;

5. Resource and Capacity Requirements

The submission must include:

- the **number of employees / consultants** available to support City leadership content development;
- details of **strategic and professional advisors** (e.g. OD professionals and leadership experts);
- details of **Key Account Executives / Managers** and content development team members;
- **CVs of key** employees demonstrating experience in leadership content design within large, complex organisations (3 000+ employees); and
- experience ranges aligned to the **Part A functionality scoring framework**.

6. Reporting Requirements

The service provider must submit:

- formal **close-out reports**;
- **post-programme insights**; and
- **recommendations for further leadership development**.

Close-out reports must include:

- an executive summary;
- key insights and findings;
- identified risks;
- recommendations;
- measurement results; and
- a structured synthesis of findings suitable for multiple stakeholder groups.

7. Off-the-Shelf and Bespoke Content

The service provider must be able to:

- adapt suitable **off-the-shelf content**, and

- develop **fully bespoke leadership development content** aligned to the City's strategic objectives and context.

5.3.2 PART A - Design, development and delivery of Leadership Development Programmes - Programme facilitation

The City of Cape Town requires suitably qualified and experienced service providers to **facilitate and deliver Leadership Development Programmes** either **virtually, in-person, or through hybrid delivery models**.

This Part relates **exclusively to facilitation and delivery** of leadership development programmes and **does not include programme or content design**, which is addressed separately under **Part A**.

Facilitation may be undertaken using:

- City-approved leadership development content, and/or
- content developed by service providers appointed under Part A of this tender.

Service providers must demonstrate sound knowledge, expertise, and experience in facilitating **all three (3) leadership development programmes** listed below. Failure to demonstrate experience across **all three programmes** will render the tender submission **non-responsive**.

- The three programmes are:
 1. **Senior Leadership Development Programmes**
 2. **Management Development Programmes** (Middle Management / Heads)
 3. **Supervisory / First-Line Leadership Programmes**
- All programmes must have been facilitated by the tenderer within **large, complex organisations** comparable in size and operational scope to the City of Cape Town (i.e. organisations employing **3,000 or more employees**, with multiple business units or divisions operating across functional and/or geographic areas).

Tenderers must submit **examples of facilitated leadership development programmes** completed or in progress within the **last five (5) years** (projects initiated from 2021 to present). Examples submitted must cover **all three leadership programmes** and include sufficient detail to demonstrate:

- facilitation methodology applied during programme delivery (virtual, in-person or hybrid),
- examples of facilitation agendas, session plans, or learner journeys,
- examples of reports or outcomes captured from facilitated sessions,
- assessments, tools or instruments used during facilitation,
- duration and timelines of interventions, including completed project plans or delivery schedules,
- methods used to establish and maintain **psychological safety** and effective group dynamics,
- creativity and innovation in facilitation techniques, materials and learner engagement,
- preferred learning formats applied (e.g. case studies, scenarios, experiential learning),
- reports and/or presentations delivered to the client with relevant supporting information,
- scale and complexity of facilitation, including:
 - size of the organisation,
 - number of participants and stakeholders impacted.

Service providers must demonstrate an approach to measuring the **effectiveness of leadership development programme facilitation**, including both immediate and longer-term outcomes. This must include:

- tools to confirm immediate feedback on facilitation and content delivery,
- approaches to measure learning application once new knowledge and behaviours are applied in the work environment,
- a clear distinction between:
 - **content effectiveness** (e.g. relevance, understanding, shifts in thinking), and
 - **return on investment (ROI)** (e.g. behavioural change, leadership practice, organisational impact),
- examples of detailed **close-out reports and/or presentations**, including synthesised findings and recommendations for further action.

Tenderers must demonstrate adequate **facilitation capability and resourcing** to deliver leadership development programmes at scale. This includes:

- demonstrated experience facilitating leadership development programmes across all three leadership levels,
- submission of **Curriculum Vitae (CVs)** for proposed facilitators, clearly indicating:
 - models and methodologies used,

- relevant leadership development facilitation experience,
- examples of previous work completed,
- identification of:
 - senior level / lead facilitators,
 - facilitators, and
 - functional expert facilitators (where applicable)
 - across all three leadership programme levels
- Where psychometric tools are used as part of facilitation, proof of **HPCSA registration** must be provided for the relevant employees.

The service provider may be required to provide **additional related facilitation or support services** from time to time, subject to:

- prior agreement, and
- written confirmation between the City of Cape Town representative and the service provider.

The City requires service providers to complete facilitated sessions that are / have been conducted either virtually or in-person and include but are not limited to the following: **1) Leadership Development Programmes for senior leadership, 2) Management Development Programmes for middle management and 3) Supervisory Development Programmes for first line supervisors.** The submission must contain sound knowledge, expertise and experience in the facilitation of **all three programmes** concluded in large organisations of the same size and complexity as the CCT (3000 employees or more).

Examples of facilitation of all three programmes must be submitted and will be evaluated with due consideration of:

Facilitation Methodology used for conducting the leadership development programme facilitation session **(including online or in-person)**

- i. An example of the report/outcomes captured for the leadership development programme facilitation session
- ii. Examples of any assessments or tools used to facilitate the leadership development programme
- iii. The time period of the interventions including an example of a past completed project plan
- iv. How psychological safety for participants during the facilitated session was established and maintained
- v. Creativity and innovation in the content and material applied and used to obtain the desired outcome
- vi. Preferred format of instilling learning e.g. Case studies and scenarios, practical learning
- vii. Reports and/or presentations delivered with relevant supporting information
- viii. Scale and organisational complexity of recent leadership development programme facilitation engagements (last 5 years: 2021 to present). Examples must clearly indicate:
 - the **size of the organisation** (for example, number of employees); and
 - the **number of participants or stakeholders** involved in the programme.

The service provider must provide details of how the effectiveness of programme delivery will be measured, including the use of appropriate measurement tools to gather **immediate feedback on the relevance, clarity, and usefulness of the content delivered**, as well as **approaches to understanding how learning is applied in the work environment over time.**

The service provider must provide the full range of facilitation support for in person sessions including but not limited to the registration process, securing venues, catering, all materials and learning aids, securing and transporting speakers/delegates, securing support for facilitators within the geographic area of the City of Cape Town. Venues need to be accessible to employees working for the City of Cape Town (within the Municipal Boundary of the City of Cape Town), sufficient audiovisual equipment must be available, **maximum of 25 seats** (Size of venue option 1), **OR minimum 26 and maximum 50 seats** (Size of venue option 2), **OR minimum 51 and maximum 150 seats** (size of venue option 3) **OR minimum 151 and maximum 300 seats** (size of venue option 4) space for breakaway sessions, whiteboards and other materials for projection and presentation (in person sessions), functioning air conditioner, appropriate ventilation and lighting. Venue must include properly functioning and sufficient restrooms / toilet facilities including for people with disabilities. Building access for people with disabilities will be required. Adequate parking arrangements at the venue. **Service provider to align with national cost containment measures and the City's Catering and Beverages policy of R72,71 per person for training in excess of 5 hours.** This value will be adjusted annually by the National Treasury Department. It is expected that the catering includes tea/coffee and lunch and that the menu for lunch ensures consistency in meal offering e.g. similar kind of meals, with variety, and portion size. Meals must be Halaal.

Virtual sessions – all materials must be provided electronically at least 24 hours beforehand. The service provider must have access to various electronic platforms that are aligned to the CCT IS&T infrastructure. Typically, the City use MSTEAMS.

Face to Face and hybrid sessions- all printed material to be provided by vendor at the face-to-face sessions.

Provide any additional related services as required from time to time subject to prior agreement and written confirmation between the CCT Representative and the Service Provider

5.3.3 Part B: Organisational development interventions design and facilitation

The service provider must be able to deliver interventions to ensure that teams within the City operate collaboratively and are capacitated to be responsive to customer needs. Details of the methods, systems and practices that will be used to create behavioural change in teams and enable high performance must be provided.

The service provider will be required to utilise assessment or diagnostic tools or apply existing diagnoses from City Organisational Effectiveness and Innovation (OE&I) professionals, to identify the key areas to address within teams. The service provider must analyse and draw insights from information provided by all branches within OE&I to develop, inter alia, workshops, team enabling interventions and strategic planning and visioning sessions, considering the target audience which may include employees from TASK 2 to TASK 24 (Paterson A–E Upper). This must include consultation with relevant stakeholders to achieve buy in to the proposed approach.

The service provider will be required to conceptualise and design workshops, team enabling interventions and strategic planning sessions with an emphasis on building high performing, solution focused, collaborative and transversal teams. Interventions may include, but are not limited to: conflict resolution within teams; support for leaderless teams who are required to perform and achieve outcomes; building teams for higher performance; applying interventions based on lean management or design led thinking principles; enabling team insights into ways of working better; building resilient teams including designing processes for difficult conversations, open communications and resilience in the face of conflict or disruption; and supporting appreciation of all forms of diversity, including neurodiversity.

The service provider must demonstrate innovative facilitation techniques and methods to enable a broad range of interventions across all levels of employees, including but not limited to appreciative inquiry, dialoguing, storytelling, café style conversations, focus groups, action learning, design led thinking, large group interventions, and the use of gamification or AI enabled technologies. The service provider must determine the objective and interpret the brief provided by the City to ensure the appropriate facilitation and engagement approach is adopted, gather and analyse information using various data sets, draw insights to inform the facilitation design, and consult with relevant stakeholders to obtain buy in and agreement on the recommended approach for workshops, interventions, initiatives, events, projects or strategic planning sessions.

The service provider must compile a facilitation offering to ensure the desired outcomes are met and conduct and facilitate workshops, focus groups, interventions, initiatives, events, projects and strategic planning sessions for a broad spectrum of City officials and political office bearers spanning multiple disciplines and operating at any geographic location within the municipal boundaries of the City of Cape Town. This includes the facilitation of existing leadership development and team enablement programmes. The service provider must utilize and provide all materials, products, tools and mechanisms required to aid the facilitation process across all employee levels, including the development of toolkits such as online learning modules, practical action and outcomes-based learning materials, case studies, role plays and similar.

The service provider must ensure that all facilitators deployed for City interventions possess the requisite facilitation, OD, behavioural insight and organisational development skills, with demonstrated experience and qualifications relevant to complex organisational environments. Facilitators must be OE&I orientated in their approach, capable of interpreting organisational data, applying diagnostic insights, and integrating change management and OD methodologies where these overlap in the delivery of interventions. For each intervention, the service provider must allocate a Lead Facilitator responsible for overall delivery and the achievement of outcomes, supported by one or more Support Facilitators where required to manage participant numbers, breakout activities or specialist content.

The service provider must synthesise information gathered during workshops and interventions into detailed reports, executive summary and presentations tailored to various stakeholder groupings, and present feedback to key stakeholders. The report format and number of presentations will be defined based on the scope of the intervention and agreed between the City and the service provider. The service provider will also be required to develop and provide feedback reports and/or facilitated follow-up sessions for all interventions and workshops and must be able to demonstrate approaches to measuring the effectiveness of interventions, including immediate participant feedback and proposed indicators for the City's interventions effectiveness once new learning is applied in the work environment. The City will be taking steps to ensure that every intervention provides a return on investment.

The service provider must provide the full range of facilitation support for in-person sessions including, but not limited to, the registration process, securing venues, catering, all materials and learning aids, securing and transporting speakers or delegates, and securing support for facilitators within the geographic area of the City of Cape Town. Venues used for interventions must be located within the municipal boundary of the City of Cape Town, be accessible to employees, and comply with the following seating capacity options as required by the City: a maximum of 25 seats (Option 1), or a minimum of 26 and maximum of 50 seats (Option 2), or a minimum of 51 and maximum of 150 seats (Option 3), or a minimum of 151 and maximum of 300 seats (Option 4). Venues must provide sufficient audiovisual equipment, space for breakaway sessions, whiteboards and other materials required for projection and presentation, a functioning air conditioner, appropriate ventilation and lighting, properly functioning and sufficient restrooms including those accessible to people with disabilities, compliant disability access to the building, and adequate parking.

The service provider must align to national cost containment measures and the City's Catering and Beverages Policy of R72,71 per person for training sessions exceeding five hours (subject to annual National Treasury adjustments) and ensure that catering includes tea/coffee and lunch and that menu offerings remain consistent in type, variety and portion size. All meals provided must be Halaal. Printed material required for participants must be provided by the service provider, with the cost fully absorbed in the price schedule.

The service provider must provide for virtual team enablement and OD intervention sessions. All materials must be provided electronically at least 24 hours beforehand. Printed material required for participants must be provided by the service provider at its own cost. The service provider must have access to electronic platforms aligned to CCT IS&T infrastructure. The City typically uses Microsoft Teams (MSTEAMS), and all virtual facilitation offerings must, as a minimum, support this platform.

The service provider must be able to provide either off the shelf solutions or develop bespoke workshops and team enabling interventions across different levels of the organisation. Where psychometric assessments or diagnostic instruments are used, the service provider must ensure that practitioners hold the appropriate professional registration, including registration with the Health Professions Council of South Africa (HPCSA), and provide proof of registration upon request.

The service provider must provide any additional OD or facilitation related services as required from time to time, subject to prior agreement and written confirmation between the City's Representative and the service provider.

5.3.4. Part C Organisational Effectiveness & Innovation Functional Expertise

Under Part C, the City of Cape Town requires suitably qualified service providers to supply **Functional Experts** who deliver **expert-led content, thought leadership, specialist training, strategic insights, and enterprise-wide learning** in support of the City's **Organisational Effectiveness and Innovation (OE&I)** priorities.

Functional Experts appointed under Part C may be engaged to deliver, inter alia:

- keynote presentations and thought leadership talks;
- specialist or functional masterclasses;
- expert-led training sessions;
- large-group learning events and enterprise-wide engagements;
- thematic learning sessions or learning series;
- strategic dialogues and expert-led discussions (non- OD);
- knowledge-sharing sessions aligned to organisational priorities.

Engagements may be delivered to employees or leaders **across all levels of the organisation** and may take place **virtually, in-person, or in hybrid formats**.

The tenderer must demonstrate access to Functional Experts with recognised expertise in one or more **OE&I-related domains**, including but not limited to:

- Leadership practice (content-focused, not programme-based);
- Organisational behaviour and culture concepts;
- Coaching and mentoring (conceptual or skills-based);
- Business improvement tools and methodologies;
- Organisational design (conceptual application);
- Innovation capability and future-thinking practices;
- Diversity, including neurodiversity;
- Customer satisfaction and service excellence;
- Ethics and governance;
- Other specialist areas aligned to the City's strategic priorities.

The tenderer must demonstrate the capability to deliver **expert-led engagements** using methodologies appropriate to **knowledge transfer, insight generation, and learning**, rather than OD intervention.

This includes the ability to:

- interpret and clarify the engagement brief to ensure the expert input is aligned to the required objective;
- simplify complex or technical subject matter into practical, understandable insights;
- deliver expert content through virtual, in-person, and hybrid formats;
- adapt delivery approaches to suit different audience levels and contexts;
- utilise appropriate engagement techniques (e.g. storytelling, interactive discussion, case-based learning, illustrative examples);
- apply innovative content-delivery techniques where appropriate (e.g. digital tools, micro-learning, interactive formats).

Where facilitation techniques are used, these must be **in service of content delivery and knowledge exchange**, and **must not constitute OD facilitation, diagnostics, or intervention work**.

All content delivered under this Part must be **POPIA-aligned**.

The tenderer must demonstrate the ability to **customise expert content** to the organisational context of the City of Cape Town.

This includes:

- contextual research or pre-engagement understanding;
- adaptation of examples, case studies or scenarios to the public-sector environment;
- tailoring of frameworks, language or emphasis to align with the City's strategic and cultural context.

Examples of past engagements where expert content was customised must be provided.

The tenderer must demonstrate an approach to:

- gathering feedback on expert-led sessions;
- assessing perceived relevance, usefulness, or clarity of content delivered;
- capturing insights arising from engagements where relevant.

This may include feedback surveys, reflections, session summaries, or other appropriate mechanisms.

To measure effectiveness of OD session impact evaluation, or behavioural diagnostics are **not required under Part C**.

The tenderer must demonstrate adequate capacity to support expert engagements at scale, including:

- appointment of a **Key Account Manager (KAM)** to coordinate engagements, communication and scheduling;
- administrative and logistical capability to support large-group sessions (including 300+ participants);
- coordination of expert availability and session logistics;
- support for virtual event hosting and hybrid delivery formats.

Where in-person expert engagements are required, the service provider must be able to provide **end-to-end delivery support**, including but not limited to:

- participant registration and coordination;
- venue sourcing within the **municipal boundary of the City of Cape Town**;
- provision of suitable venues with adequate audiovisual equipment;
- seating capacity options, including:
 - up to 50 participants,
 - 51-99 participants,
 - 100-199 participants,
 - 200-300 participants;

- accessibility for persons with disabilities;
- appropriate ventilation, lighting and restroom facilities;
- provision of materials and learning aids;
- coordination of speakers or subject-matter experts.

Where catering is required:

- it must comply with **National Treasury cost containment measures** and the City's **Catering and Beverages Policy** (currently R72.71 per person for engagements exceeding 5 hours, adjusted annually);
- catering must include tea/coffee and lunch;
- lunch menus must be consistent in quality and portion size;
- all meals must be **Halaal**.

For virtual or hybrid expert engagements:

- all materials must be provided electronically at least **24 hours in advance**;
- delivery platforms must align with the City's IS&T infrastructure;
- the City's standard platform is **Microsoft Teams (MS Teams)**.

The service provider may be required to provide **additional expert-led services** from time to time, subject to:

- prior agreement, and
- written confirmation between the City's representative and the service provider.

5.3.5 PART D - Employee and Leadership -360 Degree Feedback

The provision of a 360 Degree feedback /development tool is required to provide insight into individual employee's strengths and development areas as aligned to the City's leadership competency framework and associated behavioural outcomes.

The assessment mechanism should be able to measure inter alia: employee's strengths and development areas as assessed by self, other evaluators, including the direct supervisor, peers and subordinates and must be aligned to the City's leadership behaviours.

The feedback tool should be able to provide statistical analyses of strengths and development gaps with an overall report available to the employee or any other relevant stakeholders at the City identifying areas of development and an action plan to address these.

Any 360-feedback system that is developed must include relevant City role players and it must be compatible with City IT systems and policies. The service provider will be responsible for the maintenance and upgrading of the 360-assessment system as well as skills transfer to City officials to ensure ongoing system support is managed in house for the duration of the tender. This 360-assessment system will remain the property of the City of Cape Town.

The service provider must be able to develop/provide a solution including the following offerings:

- Dimensions for the 360-feedback to be established, including competency and behaviorally based questions
- The ability to construct questions based on specific imperatives within the City
- A mechanism for rater selection
- Monitoring and evaluation of usage via progress reports
- Manage completion and generation of individual reports
- Reports must be user friendly
- Feedback training for City officials within Organisational Development
- Team feedback report where a team has concluded 360 feedback

5.3.6 Part E Change Management, Change Leadership Development and Establishing a Change Network

A service provider is required to work with the internal Organisational Effectiveness and Innovation Change Management professionals to assist with the provision of Change Management, Change Leadership Development and the Establishment of a Change Network within the City.

In relation to Change Management, the service provider must demonstrate the ability to design and implement comprehensive, end-to-end change management programmes across people, process, technology, and operating-model initiatives. This includes applying recognised change management methodologies and models, amongst other industry recognised methodologies but not limited to, e.g. PROSCI change methodology, ADKAR change model, Kotter's 8 Step Model, Dean and Linda Anderson's Change Leader's Roadmap, or equivalent methodologies and delivering structured interventions such as change impact assessments, change readiness assessments, change strategies, integrated change-project plans, stakeholder and communication plans, training plans, resistance management plans, and associated tools (e.g., leadership packs, toolkits, FAQs, cheat sheets, training materials, change playbooks, and reinforcement mechanisms). Providers must show evidence of having implemented such programmes with a clear demonstration of scale, stakeholder diversity, organisational complexity, and measurable outcomes - both quantitative and qualitative relating to adoption, utilisation, and behaviour change.

In relation to Change Leadership Development, the service provider must demonstrate proven capability in designing and facilitating change leadership development programmes that build leadership capability at all organisational levels. This includes creating and delivering developmental experiences for Executive Directors, Senior Managers, and Middle Management that equip leaders to actively sponsor, drive, and sustain change. Submissions should include examples of programme content, learning objectives, change leadership playbooks, sponsor roadmaps, coaching tools and any behavioural-science-based or innovative approaches used to observe and strengthen behaviour change. The service provider must also outline programme duration, delivery methods, cohort structures, and evidence of effectiveness through measurable improvements in leadership engagement and change sponsorship. All examples must reflect experience gained within complex, multi-faceted organisations comparable in scale to the City.

In relation to Change Leadership Development, the service provider must demonstrate experience in establishing, mobilising, and supporting effective change networks at enterprise level. This includes the identification and nomination of change champions and change agents; the creation of clear role profiles; and the onboarding, training, and enablement of all change network members. Providers must present examples of tools and materials used to build capability across the change network such as guides, templates, playbooks, and community of practice structures, including governance mechanisms, reporting processes, and feedback loops used to monitor performance and support consistent change adoption. Evidence must show that such change networks were established within large, complex organisations with diverse stakeholder groups, extensive operational breadth, and multiple lines of business.

For Change Leadership Development, **the service provider must provide the full range of facilitation support for in person sessions** including but not limited to the registration process, securing venues, catering, all materials and learning aids, securing and transporting speakers/delegates, securing support for facilitators within the geographic area of the City of Cape Town. Venues need to be accessible to employees working for the City of Cape Town (within the Municipal Boundary of the City of Cape Town), sufficient audiovisual equipment must be available, **maximum of 25 seats** (Size of venue option 1), **OR minimum 26 and maximum 50 seats** (Size of venue option 2), functioning air conditioner, appropriate ventilation and lighting. Venue must include properly functioning and sufficient restrooms / toilet facilities including for people with disabilities. Building access for people with disabilities will be required. Adequate parking arrangements at the venue. **Service provider to align with national cost containment measures and the City's Catering and Beverages policy of R72,71 per person for training in excess of 5 hours.** This value will be adjusted annually by the National Treasury Department. It is expected that the catering includes tea/coffee and lunch and that the menu for lunch ensures consistency in meal offering e.g. similar kind of meals, with variety, and portion size. Meals must be Halaal.

Virtual sessions – all materials must be provided electronically at least 24 hours beforehand. The service provider must have access to various electronic platforms that are aligned to the CCT IS&T infrastructure. Typically, the City uses MS TEAMS.

Provide any additional related services as required from time to time subject to prior agreement and written confirmation between the CCT Representative and the Service Provider.

5.3.7 Part F - Professional Services for Talent Management and Developmental Assessments

A service provider is required to provide Senior Talent Management Consultants, Talent Management Consultants, qualified Organisational Psychologists, HR Consultant, and Account Manager resources with relevant qualifications in Behavioural Sciences, Human Resource Management, or Organisational Psychology.

The proposed resources must collectively demonstrate proven expertise in Talent Management within complex, large-scale organisations employing more than 1 000 employees. The Senior Talent Management Consultant must have a minimum of four (4) years' experience in Talent Management at a senior leadership level. The Talent Management Consultant must have between five (5) and eight (8) years' experience in the same field.

The Organisational Psychologist must be registered as an Industrial/Organisational Psychologist and have between five (5) and eight (8) years' relevant experience, including demonstrated expertise in developmental assessments, behavioural profiling, and leadership potential analysis.

The Account Manager must have a minimum of five (5) years' experience in client account management, project tracking, and stakeholder communication, ensuring effective coordination, reporting, alignment, and quality assurance across all deliverables.

This includes knowledge of, and experience in:

- Development of Talent Profiles: Designing and implementing Talent Profiles to support the City's Talent Lead in engaging line management during Talent Review and Succession Planning discussions.
- Talent Workshops and Line Manager Enablement: Supporting the City's Talent Lead in the design and facilitation of Talent and Career workshops aimed at building line management capability in chairing Talent Forums, conducting meaningful career conversations, and actively managing talent engagement.
- Developmental Assessment and Profiling: Conducting developmental assessments and profiling of selected high-potential talent and identified successors for key leadership and scarce-skills roles, using validated behavioural and potential assessment tools.
- Competency-Based Measurement: Applying assessment tools that measure potential and future performance in a competency-based manner, aligned to the City's leadership and capability frameworks.
- Succession Profiles and Readiness Reporting: Compiling individual succession profiles and readiness reports that clearly indicate development priorities, leadership potential, readiness timelines, and targeted growth recommendations.
- Talent Forum and Succession Analytics: Preparing consolidated Talent Forum outputs and Succession Readiness reports, including analysis of talent risk, development needs, critical role coverage, and leadership bench strength.
- Digital Talent Enablement: Using Talent Management systems and digital tools to support Talent Profile development, data capture and tracking, reporting, and ongoing online engagement between employees, line managers, and HR Business Partners.
- Developmental Behavioural Assessment: Applying developmental behavioural assessment techniques—explicitly linked to Talent Management and development processes, and not to recruitment or selection—to inform individual, team, and organisational development decisions based on competencies.
- Integration with Workforce and Leadership Initiatives: Integrating Talent Management practices with Workforce Planning, Leadership Development, coaching, mentoring, and broader capability-building initiatives.

Requirement

The City requires the services of experienced Senior Talent Management Consultants, Talent Management Consultants, Organisational Psychologists, and Account Manager to be utilised on an ad hoc basis to support the Organisational Development Branch with the implementation and facilitation of the City's Talent Management processes across approximately 88 departments in 13 directorates, targeting up to 5,000 employees.

Of the total employee population included in Talent Mapping, up to 15% (approximately 750 employees) identified as top talent through the Talent Review process may be selected for developmental assessments as part of the Talent Management process. These assessments will inform individual development priorities, leadership readiness, and succession planning decisions.

Under the direction and guidance of the City's Organisational Development professionals and the City's Talent Management Lead, the Service Provider will be responsible for the following:

- Talent Review and Succession Facilitation: Facilitating structured Talent Review and Succession Planning sessions with the City's Talent Management Lead and HR Business Partners to assess employee potential, readiness, and development priorities.
- Talent Profile Coordination: Coordinating, maintaining, and quality-assuring Talent Profile data to ensure accuracy, completeness, and alignment with Talent Review and succession processes.
- Line Management Enablement: Providing training, guidance, and advisory support to line managers to strengthen effective talent engagement, meaningful career conversations, and the facilitation of Talent and Succession Forums.
- Developmental Assessments: Conducting developmental assessments for selected high-potential employees and identified successors, and compiling individual succession profiles and readiness reports that inform targeted development actions.
- Capability Transfer for Assessments: Providing access to assessment training and knowledge transfer for in-house psychologists and psychometrists to support internal capability building and sustainability.
- Digital Platform Access: Enabling appropriate administrative access to the online Talent Management and assessment platform for in-house professionals to allow report generation, data management, and the provision of feedback in line with governance requirements.
- Project and Account Management: Ensuring effective project coordination, progress tracking, stakeholder communication, and account management to maintain agreed quality standards, timelines, and delivery outcomes.

Service Providers are required to submit a comprehensive company profile that clearly demonstrates proven experience in delivering Talent Management consulting services to large and complex organisations. The profile must include evidence of relevant projects in which the Service Provider has provided strategic guidance and advisory services across Workforce Planning and Talent Strategy, including Succession Planning, Employer Branding, Talent Development, assessment processes, and Career Management initiatives.

Detailed CVs of all proposed resources — including the Senior Talent Management Consultant, Talent Management Consultant, Organisational Psychologist, and Account Manager — must be submitted. Each CV should clearly demonstrate experience and competence aligned to the requirements and activities outlined in the preceding section.

All consultants and project personnel will be exposed to information and data that are confidential in nature. Accordingly, service providers are required to strictly observe all City protocols and comply fully with the provisions of the Protection of Personal Information Act (POPIA). Non-compliance with these requirements will be managed in line with POPIA legislation (clause 36) and through the City's contract performance management processes.

5.3.8 Part G – Integrated People Management, Business Improvement and Organisational Design solutions

People management

The Service Provider is required to provide Senior Human Capital Consultant and Human Capital Consultant resources with relevant postgraduate qualifications, or related qualifications in fields such as Behavioural Sciences. The Senior Human Capital Consultant must have eight (8) years or more experience, while the Human Capital Consultant must have between five (5) and eight (8) years' experience, in the field of people management.

These resources must demonstrate proven experience in talent metrics and research, talent management facilitation and development, and the interpretation and implementation of strategic workforce plans and operational workforce plans, also referred to as people management or talent strategies. Their experience must include demonstrated knowledge of, and practical application in, these areas.

- People management planning, including forecasting of workforce capacity and current and future skills requirements.
- People development aligned to existing and future skills needs and the Workplace Skills Planning (WSP) process.
- Development and implementation of attraction and retention strategies to support workforce sustainability.
- Management and analysis of talent mobility, including advising line management on appropriate workforce and talent interventions.
- Alignment of business strategy, priority projects, and programmes with the skills required to successfully deliver organisational objectives.
- Identification of skills requirements to support future, forecasted business scenarios.
- Reporting on strategic workforce plans and related people management outcomes.

The City requires the services of an experienced Senior Human Capital Consultant and a Human Capital Consultant that will be utilised on an ad hoc basis. The requirement will be to support the Organisational Development branch with the implementation of strategic workforce plans in the City across around 76 departments situated in 12 Directorates. Under the direction and guidance of the Organisational Development professionals project plans will be developed for departments to manage the development or update to strategic workforce plans. This will include the engagement with HR Business Partners and the City's Talent Lead, creating conversations on the content of SWPs, drawing conclusions from the Talent information and SWP information presented, completing draft SWP reports and participating in the process for the extraction of talent information. Service providers are required to submit details of their previous experience in offering this kind of service to organisations (presented in a company profile for submission as part of the tender) as well as the detailed CV's of proposed resources for this tender (Senior HC Consultants and HC Consultants) with clear indication of experience in the bullet points set out above). The SHC and HC Consultants will be exposed to information and data that is deemed confidential. The consultants will be required to observe the City protocol in this regard. Failure to adhere to this requirement will be managed within the prescripts of POPIA legislation as outlined in clause 36 as well as contract performance.

Organisational design

The Service Provider must demonstrate the ability to provide suitably qualified and experienced Senior Organisational Design Consultants and Organisational Design Consultants, specialising in organisational design, target operating model development, workforce architecture, and organisational transformation.

- Senior Organisational Design Consultants must have extensive experience leading large-scale organisational design and organisational transformation initiatives within complex organisations.
- Organisational Design Consultants must demonstrate practical experience in organisational diagnostics, structure design, operating model development, and implementation support.
- Resources must have experience operating in highly regulated, unionised, and service delivery-focused environments.
- Resources must demonstrate the ability to work across multiple functions and directorates simultaneously and to facilitate engagement with executive management, line management, organised labour, and other key stakeholders.

The primary role of the Organisational Design resources will be to ensure that organisational structures, governance arrangements, workforce capability, and operating models are aligned to the City's strategic objectives, service delivery requirements, and future workforce needs.

The specific focus of the proposed resources must include demonstrated experience and practical application in:

- Development and review of Target Operating Models (TOMs) and service delivery models.
- Design, redesign and optimisation of organisational structures, including functions, reporting relationships, governance arrangements, spans of control and management layers.
- Conducting organisational diagnostics and capability assessments to identify structural gaps, duplication, inefficiencies and future capability requirements.
- Development and implementation of job architecture frameworks, including job families, role profiles, levels of work and role design.

- Conducting organisational scenario modelling and affordability assessments to evaluate alternative organisational structures.
- Aligning organisational structures and workforce capabilities with strategic workforce plans and talent strategies.
- Supporting organisational transformation programmes, including transition planning, implementation roadmaps and change impact assessments.
- Applying predictive analytics and organisational design technologies to support organisational modelling, workforce analysis and decision-making.
- Integrating organisational design outputs with broader Human Capital Management, talent management and strategic workforce planning initiatives.

The City requires the services of experienced Senior Organisational Design Consultants and Organisational Design Consultants on an ad hoc basis to support the Organisational Development and Business Improvement and Organisational Design Branches with organisational design, operating model reviews, organisational restructuring initiatives, capability assessments and workforce optimisation projects across approximately 76 departments within 12 Directorates.

Provide evidence of previous relevant experience as a business (number of assignments) in providing resources and capacity for management and completion of **organisational design** interventions in organisations of a similar nature to the CCT requirements (complexity, size (5 000 employees plus) as per the past 10 years (work being done in the past 10 years will be applicable as per the more recent evolution of Business practice in this field) Details of experience to be evident in company profile confirming the extent of the experience.

All consultants and project personnel will be exposed to information and data that are confidential in nature. Accordingly, service providers are required to strictly observe all City protocols and comply fully with the provisions of the Protection of Personal Information Act (POPIA). Non-compliance with these requirements will be managed in line with POPIA legislation (clause 36) and through the City's contract performance management processes.

Business Improvement

The Service Provider must demonstrate the ability to provide suitably qualified and experienced Senior Lean Six Sigma (Black Belt) Specialists and Lean Six Sigma Consultants, specialising in continuous business improvement, business process optimisation, and operational excellence.

- Senior Lean Six Sigma (Black Belt) Specialists must have extensive experience leading large-scale business improvement and operational excellence initiatives using recognised Lean Six Sigma methodologies.
- Lean Six Sigma Consultants must demonstrate practical experience in business process analysis, process redesign, root cause analysis, and implementation of continuous improvement initiatives.
- Resources must have experience operating in highly regulated, unionised, and service delivery-focused environments.
- Resources must demonstrate the ability to work across multiple functions and directorates simultaneously and to facilitate improvement initiatives involving operational, technical and support functions.

The primary role of the Lean Six Sigma resources will be to identify, design, and implement opportunities for continuous business improvement through the optimisation of people, processes, technology and data. The objective of these interventions is to improve service delivery, eliminate waste, optimise resources, enhance customer outcomes, and deliver measurable operational and financial benefits.

The specific focus of the proposed resources must include demonstrated experience and practical application in:

- Identification and prioritisation of business improvement opportunities arising from organisational strategy, operational reviews and service delivery challenges.
- Business process analysis and process mapping, including the development of current-state (AS-IS) and future-state (TO-BE) process models.
- Application of Lean Six Sigma methodologies and tools, including DMAIC, value stream mapping, root cause analysis, waste elimination and statistical analysis techniques.
- Identification and quantification of opportunities for cost savings, revenue enhancement and resource optimisation.
- Design and implementation of business process improvements that integrate people, process and technology solutions.
- Development of business cases, implementation plans and benefits realisation frameworks for

business improvement initiatives.

- Design and implementation of performance measurement systems, including process KPIs, operational dashboards and process control mechanisms.
- Facilitation of cross-functional workshops and stakeholder engagements to validate findings, co-design solutions and embed a culture of continuous improvement.
- Application of data analytics, digital technologies and process optimisation tools to support evidence-based decision-making and the sustainable implementation of business improvement initiatives.

The City requires the services of experienced Lean Six Sigma (Black Belt) Specialists and Lean Six Sigma Consultants on an ad hoc basis to support the Organisational Development and Business Improvement and Organisational Design Branches in undertaking business process reviews, operational diagnostics, continuous improvement initiatives, service delivery optimisation, resource utilisation assessments, and the implementation and monitoring of business improvement programmes across approximately 76 departments within 12 Directorates.

Provide evidence of previous relevant experience as a business (number of assignments) in providing resources and capacity for management and completion of **business improvement** interventions with each delivering a realised benefit of R10M or more in either cost savings, revenue enhancement or an equivalent improvement in operational performance, in organisations of a similar nature to the CCT requirements (complexity, size (5 000 employees plus) as per the past 10 years (work being done in the past 10 years will be applicable as per the more recent evolution of Business practice in this field). Details of experience to be evident in company profile confirming the extent of the experience.

All consultants and project personnel will be exposed to information and data that are confidential in nature. Accordingly, service providers are required to strictly observe all City protocols and comply fully with the provisions of the Protection of Personal Information Act (POPIA). Non-compliance with these requirements will be managed in line with POPIA legislation (clause 36) and through the City's contract performance management processes.

5.3.9 Part H - Innovation Management Services

The City requires the services of a Service Provider with experience in Innovation Management to provide Innovation Management services in driving the City of Cape Town's Innovation outcomes. The service provider should have vast experience in Innovation Management both in local government and the private sector and demonstrate capability in each of the identified service areas for Innovation management:

5.3.9.1 Innovation Strategy

- a. Development of the City's Innovation Strategy with a key focus on the City of Cape Town's IDP and Priority Areas. This will also take into consideration the Departmental strategies and Sector plans.
- b. Development of an Annual Implementation Plan with key objectives to be realised within the timeframe identified.
- c. The development of the Strategy will consider global trends and futures thinking scenarios and use a design thinking approach to formulate options that should be pursued, taking into cognisance the availability of resources.

5.3.9.2 Innovation Capability Index

- a. Undertake the measure of the City of Cape Town's Innovation Capability Index after every 18-month cycle to inform programmes to be implemented for the improvement of the Innovation index in line with Global Innovation best practice.
- b. Understanding and translation of methodologies, scoring systems, and benchmarking in support of the City's Innovation Capability Index development.
- c. Adaptation of International standards to measure the City of Cape Town Innovation Capability and include ISO Innovation Standards implementation and certification.

5.3.9.3 Innovation Process

- a. Define the City's Innovation Process with key levers of Innovation success for each milestone in the processes.
- b. Assessment of ideas from the idea management platforms across the City to develop

- projects/initiatives that can be taken through the innovation funnel for implementation.
- c. Review of the City's innovation governance structures and the roles fulfilled at each stage of the innovation process and future roles.
- d. Development of a matrix for the assessment of the ideas submitted on the idea management platforms.
- e. Development of a process for idea submissions to move from submission through evaluation and implementation.

5.3.9.4 Innovation Case Studies

- a. Development of Innovation Case studies to showcase Innovation Implementation in the various City of Cape Town Departments.
- b. Design & packaging of City of Cape Town's Innovation Case studies.
- c. Identify avenues to showcase in various local and international publications and platforms.

5.3.9.5 Innovation Programmes

- a. Identification and facilitation of key Innovation programmes, including:
 - i. Development of content and facilitation of training in Design Thinking, Six Thinking hats, Lateral Thinking, Future Studies tools and methodologies and other innovation tools to build Innovation Capability in the various Departments of the City of Cape Town for up to 25 participants per training session. The training programmes should be coupled with accreditation.
 - ii. Development of content and facilitation of Innovation workshops with internal and external stakeholders using Innovation tools. These workshops can be held online or in person and will also include Hackathons on identified Innovation challenges that require a technology system solution. This will include the logistics, i.e. catering, venue, for up to 150pax programme outline and report writing per intervention.
 - iii. Innovation Campaigns and showcase that emanate from the Ideas Management Platform or any other identified channels.
 - iv. Idea Pitch days that emanate from Calls for Ideas submitted on the Idea Management Platform.

5.3.9.6 Other requirements

- a. The City will determine the scope of required options to be included for each project/intervention within the financial year for the duration of the tender. These will be outlined in a brief document that will be submitted to the service provider for the required service per project/intervention.
- b. The service provider will be required to provide a Stakeholder Engagement Plan- to include stakeholder engagement, feedback loops, or co-creation processes The service provider will be required to provide interim reporting and attend progress tracking meetings as required
- c. The service provider will be required to provide reports and workshop process write ups (of the outcomes) related to the above- all reports that are submitted should be a minimum of 20 and a maximum of 50 pages and are to be provided within 10 days of hosting workshops or delivery date of each deliverable.
- d. The service provider will be responsible for all the arrangements for innovation programmes and workshops including process design, facilitation, logistics, equipment provision (including own laptop for use to display any visual material), stationery (including workbooks, flipcharts, facilitation aids, post it notes, pens, tools, props and consumables) , catering and the provision of a suitable venue.
- e. The service provider should preferably be made up of a lead facilitator and scribe to capture the process and outcomes.
- f. Any additional information relevant to the City should be included in relation to the tender submission.

5.3.9.7 Deliverables

- Innovation Strategy document with high-level implementation plan with thematic areas and key initiatives.
- PowerPoint presentation on the Innovation Strategy and approach with key focus areas for implementation per financial year.
- Report on the Innovation Capability/Maturity Index outlining key outcomes per City Directorate and Departments including the review of the innovation process and implementation plan going forward.
- PowerPoint presentation for the Innovation Capability/Maturity Index Measure outcomes
- An annual programme implementation plan with key focus on enhancing the City's Innovation Capability/Maturity index and the integration of inputs from the City's idea management platforms
- Final questionnaire for the Innovation Capability/Maturity Index Measure
- Raw data that emanates from the survey
- Innovation Case Studies including the approach and questionnaire design, integrating the innovation process per case study
- Project plan and report for each intervention as required by the City

5.4 TRADE NAMES OR PROPRIETARY PRODUCTS

Tenderers/Suppliers must note that wherever this document refers to any particular trademark, name, patent, design, type, specific origin or producer, such reference shall be deemed to be accompanied by the words "or equivalent".

5.5 EMPLOYMENT OF SECURITY PERSONNEL

All security staff employed by the Supplier on behalf of the CCT or at any CCT property must be registered with Private Security Industry Regulatory Authority (PSiRA). Proof of such registration must be made available to the CCT or its agent, upon request.

5.6 FORMS FOR CONTRACT ADMINISTRATION

The Supplier shall complete, sign and submit with each invoice, the following:

- a) Monthly Project Labour Report (described below)

The Monthly Project Labour Report must include details of all labour (including that of sub-contractors) that are South African citizens earning less than [R] per day, as adjusted from time to time (excluding any benefits), who are employed on a temporary or contract basis on this contract in the month in question.

In addition to the Monthly Project Labour Report the Supplier shall simultaneously furnish the CCT's Agent with copies of the employment contracts entered into with such labour, together with certified copies of identification documents, proof of attendance in the form of attendance register or timesheets as well as evidence of payments to such labour in the form of copies of payslips or payroll runs. If the worker is paid in cash or by cheque, this information must be recorded on the envelope and the worker must acknowledge receipt of payment by signing for it and proof of such acknowledgement shall be furnished to the CCT's Agent.

C.6 SPECIAL CONDITIONS OF CONTRACT

The following Special Conditions of Contract, referring to the National Treasury – Conditions of Contract (revised July 2010), are applicable to this agreement.

1. Definitions

Insert new clause 1.1A with the following:

- 1.1A “Commencement Date” means the date the Supplier confirms receipt from the Purchaser of 1 (one) complete, signed copy of the Contract, the *Schedule of Deviations* (if any).
- 1.1B “Conditions of Contract” means the general conditions of contract and special conditions of contract including all other contract data incorporated by reference.

Delete Clause 1.15 and substitute with the following

- 1.15 The word ‘Goods’ is to be replaced everywhere it occurs in the GCC with the phrase ‘Goods and / or Services’ which means all of the equipment, machinery, materials, services, products, consumables, etc. that the Supplier is required to deliver to the Purchaser under the agreement. This definition shall also be applicable, as the context requires, anywhere where the words “supplies” and “services” occurs in the GCC.

Delete Clause 1.19 and substitute with the following

- 1.19 The word ‘Order’ is to be replaced everywhere it occurs in the GCC with the words ‘Purchase Order’ which means the official purchase order authorised and released on the Purchaser’s SAP System.

Delete Clause 1.21 and substitute with the following:

- 1.21 ‘Purchaser’ means the City of Cape Town. The address of the Purchaser is 12 Hertzog Boulevard, Cape Town, 8001 (chosen domicilium citandi et executandi).

Add the following after Clause 1.25:

- 1.26 ‘Supplier’ means the provider of Goods and / or Services with whom the Contract is concluded also referred to as “contractor” in the GCC.
- 1.27 "Intellectual Property" means any and all intellectual property rights of any nature anywhere in the world whether registered, registerable or otherwise, including patents, trademarks, registered designs and domain names, applications for any of the foregoing, trade or business names, copyright and rights in the nature of copyright, design rights, rights in databases, know-how, trade secrets and any other intellectual property rights which subsist in computer software, computer programs, websites, documents, information, techniques, business methods, drawings, logos, instruction manuals, lists and procedures and particulars of customers, marketing methods and procedures and advertising literature, including the "look and feel" of any websites
- 1.28 “Working Day” means Monday to Friday excluding weekends and Public Holidays (in the Republic of South Africa).

3. General Obligations

Delete Clause 3.2 in its entirety and replace with the following clauses.

- 3.2 The Parties will be liable to each other arising out of or in connection with any breach of the obligations detailed or implied in this contract, subject to clause 28.
- 3.3 If the Supplier is a joint venture, all parties in a joint venture or consortium shall be jointly and severally liable to the Purchaser in terms of the Contract and shall carry individually the minimum levels of insurance stated in the Contract, if any.

- 3.4 The Parties shall comply with all laws, regulations and bylaws of local or other authorities having jurisdiction regarding the Delivery of the Goods and/or Services and give all notices and pay all charges required by such authorities.
- 3.4.1 The Parties agree that this Contract shall also be subject to the CCT's Supply Chain Management Policy ("SCM Policy") that was applicable on the date the bid was advertised as amended from time to time. If the Purchaser adopts a new SCM Policy which contemplates that any clause therein would apply to the Contract emanating from this tender, such clause shall also be applicable to the Contract. Please refer to this document contained on the CCT's website.
- 3.4.2 Abuse of the supply chain management system is not permitted and may result in termination of the Contract, restriction of the Supplier, and/or the exercise by the CCT of any other remedies available to it as described in the SCM Policy or in law.
- 3.5 The Supplier shall:
- 3.5.1 Arrange for the documents listed below to be provided to the Purchaser prior to the issuing of the Purchase Order by the Purchaser and no later than the periods as set out in the Contract:
- a) Proof of Insurance (Refer to Clause 11) or Insurance Broker's Warrantee,
 - b) Letter of good standing from the Compensation Commissioner, or a licensed compensation insurer (Refer to Clause 11),
 - c) Initial delivery programme, and
 - d) Other requirements as detailed in the Contract.
- 3.5.2 Only when notified of the acceptance of the bid on the Date of Commencement of Contract, the Supplier shall commence with and carry out the Delivery of the Goods and/or Services in accordance with the Contract, to the satisfaction, of the Purchaser.
- 3.5.3 Provide all of the necessary materials, labour, plant and equipment required for the delivery of the Goods and/or Services including any temporary services that may be required.
- 3.5.4 Insure his workmen and employees against death or injury arising out of the delivery of the Goods.
- 3.5.5 Be continuously represented during the Delivery of the Goods and/or Services by a competent representative duly authorised to execute instructions.
- 3.5.6 In the event of a loss resulting in a claim against the insurance policies stated in clause 11, pay the first amount (excess) as required by the insurance policy.
- 3.5.7 Comply with all written instructions from the Purchaser subject to clause 18.
- 3.5.8 Complete and Deliver the goods within the period stated in clause 10, or any extensions thereof in terms of clause 21.
- 3.5.9 Make good at his own expense, all incomplete and defective Goods during the warranty period.
- 3.5.10 Pay to the Purchaser any penalty for delay as due on demand by the Purchaser. The Supplier hereby consents to such amounts being deducted from any payment due to the Supplier.
- 3.5.11 Comply with the provisions of the OHAS Act & all relevant regulations.
- 3.5.12 Comply with all laws relating to wages and conditions generally governing the employment of labour in the Cape Town area and any applicable Bargaining Council agreements.
- 3.5.13 Deliver the Goods in accordance with the Contract and with all reasonable care, diligence and skill in accordance with generally accepted professional techniques and standards.
- 3.6 The Purchaser shall:
- 3.6.1 Issue Purchaser Orders for the Goods and/or Services required under this Contract. No liability for payment will ensue for arising out of the Delivery of the Goods and/or Services, unless a Purchase Order has been issued to the Supplier.

- 3.6.2 Make payment to the Supplier for the Goods and/or Services as set out herein.
- 3.6.3 Take possession of the Goods and /or Services upon Delivery by the Supplier.
- 3.6.4 Regularly inspect the Goods to establish that it is being delivered in compliance with the Contract.
- 3.6.5 Give any instructions and/or explanations and/or variations to the Supplier including any relevant advice to assist the Supplier to understand the Contract.
- 3.6.6 Grant or refuse any extension of time requested by the Supplier of the period stated in clause 10.
- 3.6.7 Inspect the Goods and/or Services to determine if, in the opinion of the Purchaser, it has been delivered in compliance with the Contract, alternatively in such a state that it can be properly used for the purpose for which it was intended.
- 3.6.8 Brief the Supplier and issue all documents, information, etc. in accordance with the contract.

5. Use of contract documents and information; inspection, copyright, confidentiality, etc.

Add the following after clause 5.4:

- 5.5 Copyright of all documents prepared by the Supplier in accordance with the relevant provisions of the Copyright Act (Act 98 of 1978) relating to the Contract shall be vested in the Purchaser. Where copyright is vested in the Supplier, the Purchaser shall be entitled to use the documents or copy them only for the purposes for which they are intended in regard to the agreement and need not obtain the Supplier's permission to copy it for such use. Where copyright is vested in the Purchaser, the Supplier shall not be liable in any way for the use of any of the information other than as originally intended in terms of the agreement and the Purchaser hereby indemnifies the Supplier against any claim which may be made against it by any person / entity, arising from the use of such documentation for other purposes.

The ownership of data and factual information collected by the Supplier and paid for by the Purchaser shall, after payment, vest with the Purchaser.

- 5.6 **Publicity and publication**
The Supplier shall not release public or media statements or publish material related to the services or agreement within two (2) years of Delivery of the Goods, without the written approval of the Purchaser, which approval shall not be unreasonably withheld.
- 5.7 **Confidentiality**
Both Parties shall keep all information obtained by them in the context of the agreement, confidential and shall not divulge it without the written approval of the other Party.
- 5.8 **Intellectual Property**
 - 5.8.1 The Supplier acknowledges that it shall not acquire any right, title or interest in or to the Intellectual Property of the Purchaser.
 - 5.8.2 The Supplier hereby assigns to the Purchaser, all Intellectual Property created, developed or otherwise brought into existence by it for the purposes of the agreement, unless the Parties expressly agree otherwise in writing.
 - 5.8.3 The Supplier shall, and warrants that it shall:
 - 5.8.3.1 Not be entitled to use the Purchaser's Intellectual Property for any purpose other than as contemplated in the agreement;
 - 5.8.3.2 not modify, add to, change or alter the Purchaser's Intellectual Property, or any information or data related thereto, nor may the Supplier produce any product as a result of, including and/or arising from any such information, data and Intellectual Property, and in the event that it does produce any such product, the product shall be, and be deemed in law to be, owned by the Purchaser;

- 5.8.3.3 Not apply for or obtain registration of any domain name, trademark or design which is similar to any Intellectual Property of the Purchaser;
- 5.8.3.4 Comply with all reasonable directions or instructions given to it by the Purchaser in relation to the form and manner of use of the CCT Intellectual Property, including without limitation, any brand guidelines which the Purchaser may provide to the Supplier from time to time;
- 5.8.3.5 Ensure that its employees, directors, members and contractors comply strictly with the provisions of this Clause 5.5.8.4 above unless the Purchaser expressly agrees to the contrary, in writing and only after obtaining due internal authority for such agreement.
- 5.8.4 The Supplier represents and warrants to the Purchaser that, in providing Goods and/or Services for the duration of the agreement it will not infringe or make unauthorised use of the Intellectual Property rights of any third party and hereby indemnifies the Purchaser from any claims, liability, loss, damages, costs, and expenses arising from the infringement or unauthorised use by the Supplier of any third party's Intellectual Property rights.
- 5.8.5 Upon expiry of the contract period and in the event that the Contract is terminated, ended or is declared void, any and all of the Purchaser's Intellectual Property, and any and all information and data related thereto, shall be immediately handed over to the Purchaser by the Supplier and no copies thereof shall be retained by the Supplier unless the Purchaser expressly and in writing, after obtaining due internal authority, agrees otherwise.

Add the following after clause 5.8:

5.9 Protection of Personal Information Act of 2013

By submitting a tender to the Purchaser, (and by concluding any ensuing related agreement with the City of Cape Town, if applicable), the Tenderer thereby acknowledges and unconditionally agrees:

- 5.9.1 that the tenderer has been informed of the purpose of the collection and processing of its personal information as defined in the Protection of Personal Information Act of 2013 ("POPIA"), which, for the avoidance of doubt is for, and in relation to, the tender process and the negotiation, conclusion, performance and enforcement of the ensuing agreement, if applicable, as well as for the City of Cape Town's reporting purposes;
- 5.9.2 to the collection and processing of the tenderer's personal information by the City of Cape Town and agrees to make available to the City of Cape Town, all information reasonably required by the City of Cape Town for the above purposes;
- 5.9.3 that the personal information the City of Cape Town collects from the tenderer or about the tenderer may be further processed for other activities and/or purposes which are lawful, reasonable, relevant and not excessive in relation to the purposes set out above, for which it was originally collected;
- 5.9.4 that, the tenderer indemnifies the City of Cape Town and its officials, employees, and directors and undertakes to keep the City of Cape Town and its officials, employees, and directors indemnified in respect of any claim, loss, demands, liability, costs and expenses of whatsoever nature which may be made against the City of Cape Town (including the costs incurred in defending or contesting any such claim) in relation to the tenderer or the tenderer's employees', representatives' and/or sub-Suppliers' non-compliance with POPIA and/or the City of Cape Town's failure to obtain the tenderer's consent or to notify the tenderer of the reason for the processing of the tenderer's personal information;
- 5.9.5 to the disclosure of the tenderer's personal information by the City of Cape Town to any third party, where the City of Cape Town has a legal or contractual obligation to disclose such personal information to the third party (or a legitimate interest exists therein);
- 5.9.6 that, under POPIA, the tenderer may request to access, confirm, request the correction, destruction, or deletion of, or request a description of, personal information held by the City of Cape Town in relation to you, subject to applicable law; and
- 5.9.7 that under POPIA, subject to applicable law, the tenderer also has the right to be notified of a personal information breach and the right to object to, or restrict, the City of Cape Town's processing of its personal

information.

5.10 **PERFORMANCE MONITORING**

- 5.10.1 As required by section 116(2)(b) of the Local Government: Municipal Financial Management Act 56 of 2003, the CCT shall monitor the performance of the Supplier on at least a monthly basis, and the Supplier agrees to provide the CCT with its full cooperation in this regard.

7. **Performance Security**

Not Applicable. Tenderers must disregard the **Pro Forma Performance Security/ Guarantee** and are not required to furnish same.

8. **Inspections, tests and analyses**

Delete Clause 8.2 and substitute with the following:

- 8.2 If it is a bid condition that Goods and/or Services to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or Supplier shall be open, at all reasonable hours, for inspection by a representative of the Purchaser or an organisation acting on behalf of the Purchaser.

10. **Delivery and documents**

Delete clauses 10.1 and 10.2 and replace with the following:

- 10.1 Delivery of the goods shall be made by the Supplier in accordance with the terms specified in the contract. The time for Delivery of the goods shall be the date as stated on the Purchase Order. In the case of agreements for Delivery of goods in terms of framework or panel agreements, Purchase Orders for the supply and delivery of goods may be raised up until the expiry of a framework or panel agreement, provided that the goods can be delivered within 30 (thirty) days of expiry of the framework or panel agreement. In this context, the "goods" does not include services and carries its ordinary meaning. All Purchase Orders other than for the supply and Delivery of goods (i.e. supply of services, professional services or constructions works), must be completed prior to the expiry of the contract period.
- 10.2 The Purchaser shall determine, in its sole discretion, whether the Goods and/or Services have been delivered in compliance with the Contract, alternatively in such a state that it can be properly used for the purpose for which it was intended. When the Purchaser determines that the Goods and/or Services have been satisfactorily delivered, the Purchaser must issue an appropriate certification, or written approval, to that effect. Invoicing may only occur, and must be dated, on or after the date of such written acceptance of the Goods.

11. **Insurance**

Add the following after clause 11.1:

- 11.2 Without limiting the obligations of the Supplier in terms of this Contract, the Supplier shall effect and maintain the following additional insurances:
- 11.2.1 Public liability insurances, in the name of the Supplier, covering the Supplier and the Purchaser against liability for the death of or injury to any person, or loss of or damage to any property, arising out of or in the course of this Contract, in an amount not less than **[R10 million]** for any single claim;
- 11.2.2 Motor Vehicle Liability Insurance, in respect of all vehicles owned and / or leased by the Supplier, comprising (as a minimum) "Balance of Third Party" Risks including Passenger Liability Indemnity;
- 11.2.3 Registration / insurance in terms of the Compensation for Occupational Injuries and Disease Act, Act 130 of 1993. This can either take the form of a certified copy of a valid Letter of Good Standing issued by the Compensation Commissioner, or proof of insurance with a licenced compensation insurer, from either the Supplier's broker or the insurance company itself (see the Pro Forma Insurance Broker's Warranty).
- 11.2.4 In the case of Contracts for delivery of professional services, Professional indemnity insurance providing cover in an amount of not less than **[R5 million]** in respect of each and every claim during the contract

period.

11.2.5 In the event of under insurance or the insurer's repudiation of any claim for whatever reason, the Purchaser will retain its right of recourse against the Supplier.

11.3 The Supplier shall be obliged to furnish the Purchaser with proof of such insurance as the Purchaser may require from time to time for the duration of this Contract. Evidence that the insurances have been effected in terms of this clause, shall be either in the form of an insurance broker's warranty worded precisely as per the pro forma version contained in the Pro forma Insurance Broker's Warranty or copies of the insurance policies.

15. Warranty

Add to Clause 15.2:

15.2 The warranty for this Contract shall remain valid for six (6) months from date of Delivery of the Goods and/or Services.

16. Payment

Delete Clause 16.1 in its entirety and replace with the following:

16.1 Payment of invoices will be made:

16.1.1 Within 30 (thirty) days of receiving the relevant invoice or statement from the Supplier, unless otherwise prescribed for certain categories of expenditure or specific contractual requirements in accordance with any other applicable policies of the Purchaser.

16.1.2 Notwithstanding anything contained above, the Purchaser shall not be liable for payment of any invoice that pre-dates the date of delivery of any Goods and/or Services.

Delete Clause 16.2 in its entirety and replace with the following:

16.2 The Supplier shall furnish the purchaser's Accounts Payable Department with an original tax invoice, clearly showing the amount due in respect of each and every claim for payment.

Add the following after clause 16.4

16.5 Notwithstanding any amount stated on the Purchase Order, the Supplier shall only be entitled to payment for Goods and/or Services actually delivered in terms of the Specification and Drawings, or any variations thereof made in accordance with clause 18. Any contingency sum included shall be for the sole use, and at the discretion, of the Purchaser.

16.6 The Purchaser will only make advanced payments to the Supplier in strict compliance with the terms and conditions as contained in the Pro forma Advanced Payment Guarantee and only once the authenticity of such guarantee has been verified by the Purchaser's Treasury Department.

16.6.1 The Advance Payment Schedule applicable to this Contract is set out below. The items of plant and materials which have been identified by the Purchaser as being suitable for advance payment in terms of this Contract are listed in the table below, and for which the Purchaser is prepared to make advance payment to the Supplier, subject to the conditions below. Should an item or items be added to the list at tender stage by a tenderer, no obligation to advance payment shall be incurred by the Purchaser, for such items added by the tenderer except as provided for herein.

Not applicable

16.6.2 The Supplier can only rely on advance payment being permitted by the Purchaser in respect of the plant and materials listed in the table above. The Purchaser may, however, permit advance payment for other plant and materials in exceptional circumstances and at its sole discretion, during the course of the Contract, and upon reasonable request from the Supplier.

- 16.6.3 Advance payment for the purposes of deposits will only be provided up to a limit of 0% of the value of any one item being claimed.
- 16.6.4 The Supplier shall provide the Purchaser with documentary evidence of the terms and conditions for which a deposit with order is required by a third party manufacturer/supplier, together with the advance payment guarantee.
- 16.6.5 The Supplier will also be permitted to obtain advance payment for the balance of the value of the plant and materials in respect of which he has paid a deposit, for an item which after manufacture is stored by the Supplier. The Supplier shall, in respect of such payment, provide an advance payment guarantee, either for such balance or, if the advance payment guarantee in respect of the deposit is to be returned by the Purchaser upon request, for the whole value of the item.

17. Prices

Add the following after clause 17.1

- 17.2 If as a result of an award of a contract beyond the original tender validity period, the contract execution will be completed beyond a period of twelve (12) months from the expiry of the original tender validity period, then the contract may be subject to contract price adjustment for that period beyond such twelve (12) months. An appropriate contract price adjustment formula will be determined by the Purchaser delegated authority if such was not included in the bid documents.
- 17.3 If as a result of any extension of time granted, the contract execution will be completed beyond a period of twelve (12) months from the expiry of the original tender validity period, then contract price adjustment may apply to that period beyond such twelve (12) months. An appropriate contract price adjustment formula will be determined by the Director: Supply Chain Management if such was not included in the bid documents.
- 17.4 Prices are firm and not subject to adjustment

18. Contract Amendments

Delete the heading of clause 18 and replace with the following:

18. Contract Amendments and Variations

Add the following to clause 18.1:

Variations means changes to the Goods and/or Services, extension of the contract period or increases in the value of the Contract as a result of written instructions issued by the Purchaser to the Supplier. Such changes are subject to prior approval by the Purchaser's delegated authority. Should the Supplier deliver any Goods not described in a written instruction from the Purchaser, the Purchaser's liability for payment shall not arise until such time as the change has been duly approved and such approval communicated to the Purchaser.

20. Subcontracts

Add the following after clause 20.1:

- 20.2 The Supplier shall be liable for the acts, defaults and negligence of any subcontractor, his agents or employees as fully as if they were the acts, defaults or negligence of the Supplier.
- 20.3 Any appointment of a subcontractor shall not amount to a contract between the Purchaser and the subcontractor, or a responsibility or liability on the part of the Purchaser to the subcontractor and shall not relieve the Supplier from any liability or obligation under the Contract.

21. Delays in the supplier's performance

Delete Clause 21.2 in its entirety and replace with the following:

- 21.2 If at any time during the performance of obligations contained in the Contract the Supplier or its subcontractors should encounter conditions beyond their reasonable control which impede the timely

delivery of the Goods and/or Services, the Supplier shall notify the Purchaser in writing, within 7 (seven) days of first having become aware of these conditions, of the facts of the delay, its cause(s) and its probable duration. As soon as practicable after receipt of the Supplier's notice, the Purchaser shall evaluate the situation, and may at his discretion extend the time for Delivery.

Where additional time is granted, the Purchaser shall also determine whether or not the Supplier is entitled to payment for additional costs in respect thereof. The principle to be applied in this regard is that where the Purchaser or any of its agents are responsible for the delay, reasonable costs shall be paid. In respect of delays that were beyond the reasonable control of both the Supplier and the Purchaser, additional time only (no costs) will be granted.

The Purchaser shall notify the Supplier in writing of his decision(s) in the above regard.

- 21.3 No provision in this Contract shall be deemed to prohibit the obtaining of Goods and/or Services from a national department, provincial department, or a local authority.

22. Penalties

Delete clause 22.1 and replace with the following:

- 22.1 Subject to GCC Clause 25, if the Supplier fails to deliver any or all of the Goods and/or Services within the period(s) specified in the Contract, the Purchaser shall, without prejudice to its other remedies under the Contract, deduct from amounts payable, as a penalty, a sum as stated herein for each day of the delay until actual Delivery or performance.

The penalty for this contract shall be **5% on the value of a purchase order**.

- 22.2 The Purchaser shall, without prejudice to its other remedies under the contract, deduct from amounts payable, financial penalties as contained on the Preference Schedule for breaches of the conditions upon which preference points were awarded.

23. Termination for default

Delete the heading of clause 23 and replace with the following:

23. Termination

Add the following to the end of clause 23.1:

If the Supplier fails to remedy the breach in terms of such notice.

Add the following after clause 23.7:

- 23.8 In addition to the grounds for termination due to default by the Supplier, the Contract may also be terminated:
- 23.8.1 Upon the death of the Supplier who was a Sole Proprietor, or a sole member of a Close Corporation, in which case the contract will terminate forthwith.
- 23.8.2 If the Parties, by mutual agreement, terminate the Contract.
- 23.8.3 If a material irregularity vitiates the procurement process leading to the conclusion of the Contract, rendering the procurement process and the conclusion of the resulting Contract unfair, inequitable, non-transparent, uncompetitive or not cost-effective the Contract may be terminated by the Purchaser (upon conclusion of applicable processes by the City Manager as described in the Purchaser's SCM Policy).
- 23.8.4 Reputational risk or harm to the Purchaser

The Purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the Supplier, may terminate the contract if the implementation of the contract may result in reputational risk or harm to the Purchaser as a result of (inter alia):

- a) reports of poor governance and/or unethical behaviour;
- b) association with known notorious individuals and family of notorious individuals;
- c) poor performance issues, known to the Purchaser
- d) negative social media reports;
- e) adverse assurance (e.g. due diligence) report outcomes; or
- f) circumstances where the relevant vendor has employed, or is directed by, anyone who was previously employed in the service of the state (as defined in clause 1.53), where the person is or was negatively implicated in any SCM irregularity.

By or in relation to the Supplier, the Contract may be terminated by the Purchaser after providing notice to the Supplier.

- 23.9 If the Contract is terminated in terms of clause 23.8, all obligations that were due and enforceable prior to the date of the termination, must be performed by the relevant Party.

26. Termination for insolvency

Delete clause 26.1 and replace with the following:

- 26.1 In the event of the Supplier becoming bankrupt or otherwise insolvent the Purchaser may elect to:
- 26.1.1 At any time, terminate the Contract by giving written notice to the Supplier; or
 - 26.1.2 Accept a Supplier's proposal (via the liquidator) to render delivery utilising the appropriate contractual mechanisms or takes steps to ensure its rights are protected and any negative impact on service delivery is mitigated.
- 26.2 In the event of the Purchaser electing to cancel the Contract in accordance with clause 26.1.1 above, the Purchaser shall make payment of all verified and signed off invoices. In the event of there being any dispute in respect of any outstanding invoices such dispute shall be dealt with in accordance with the dispute resolution mechanism in the Contract.

27. Settlement of Disputes

Amend clause 27.1 as follows:

- 27.1 If any dispute or difference of any kind whatsoever, with the exception of termination in terms of clause 23 arises between the Purchaser and the Supplier in connection with or arising out of the Contract, the Parties shall make every effort to resolve such dispute or difference amicably, by mutual consultation.

Delete Clause 27.2 in its entirety and replace with the following:

- 27.2 Should the Parties fail to resolve any dispute by way of mutual consultation, either party shall be entitled to refer the matter for mediation before an independent and impartial person appointed by the City Manager in accordance with Regulation 50(1) of the Local Government: Municipal Finance Management Act, 56 of 2003 – Municipal Supply Chain Management Regulations (Notice 868 of 2005). Such referral shall be done by either party giving written notice to the other of its intention to commence with mediation. No mediation may be commenced unless such notice is given to the other party.

Irrespective whether the mediation resolves the dispute, the Parties shall bear their own costs concerning the mediation and share the costs of the mediator and related costs equally.

The mediator shall agree the procedures, representation and dates for the mediation process with the Parties. The mediator may meet the Parties together or individually to enable a settlement.

Where the Parties reach settlement of the dispute or any part thereof, the mediator shall record such agreement and on signing thereof by the Parties the agreement shall be final and binding.

Save for reference to any portion of any settlement or decision which has been agreed to be final and binding on the Parties, no reference shall be made by or on behalf of either party in any subsequent court proceedings, to any outcome of an amicable settlement by mutual consultation, or the fact that any particular evidence was given, or to any submission, statement or admission made in the course of amicable settlement by mutual consultation or mediation.

28. Limitation of Liability

Delete clause 28.1 (a) and (b) and replace with the following:

- (a) notwithstanding any provision to the contrary contained in this contract, neither the supplier nor any of its officers, directors, employees, agents contractors, consultants or other representatives shall be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect, incidental, special or consequential loss or damage of any kind, including without limitation the loss of use, loss of production, or loss of profits or interest costs, loss of goodwill, lost or damaged data or software, costs of substitute products/services and/or loss of business or business opportunities (whether foreseeable or unforeseeable), provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser;
- (b) the aggregate liability of the Supplier to the Purchaser, whether under the Contract, in tort or otherwise, shall not exceed the sums insured in terms of clause 11 in respect of insurable events, or where no such amounts are stated, to an amount equal to twice the Contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

Add the following after clause 28.1:

28.2 Without detracting from, and in addition to, any of the other indemnities in this Contract, the Supplier shall be solely liable for and hereby indemnifies and holds harmless the Purchaser against all claims, charges, damages, costs, actions, liability, demands and/or proceedings and expense in connection with:

- a) personal injury or loss of life to any individual;
- b) loss of or damage to property;

arising from, out of, or in connection with the performance by the Supplier in terms of this Contract, save to the extent caused by the gross negligence or wilful misconduct of the Purchaser.

28.3 The Supplier and/or its employees, agents, concessionaires, suppliers, sub-contractors or customers shall not have any claim of any nature against the purchaser for any loss, damage, injury or death which any of them may directly or indirectly suffer, whether or not such loss, damages, injury or death is caused through negligence of the Purchaser or its agents or employees.

28.4 Notwithstanding anything to the contrary contained in this Contract, under no circumstances whatsoever, including as a result of its negligent (including grossly negligent) acts or omissions or those of its servants, agents or contractors or other persons for whom in law it may be liable, shall any party or its servants (in whose favour this constitutes a *stipulatio alteri*) be liable for any indirect, extrinsic, special, penal, punitive, exemplary or consequential loss or damage of any kind whatsoever, whether or not the loss was actually foreseen or reasonably foreseeable), sustained by the other party, its directors and/or servants, including but not limited to any loss of profits, loss of operation time, corruption or loss of information and/or loss of contracts.

28.5 Each party agrees to waive all claims against the other insofar as the aggregate of compensation which might otherwise be payable exceeds the aforesaid maximum amounts payable.

31. Notices

Delete clauses 31.1 and 31.2 and replace with the following:

31.1 Any notice, request, consent, approvals or other communications made between the Parties pursuant to the Contract shall be in writing and forwarded to the addresses specified in the Contract and may be given as set out hereunder and shall be deemed to have been received when:

- a) hand delivered – on the day delivery of delivery or the next Working Day,
- b) sent by registered mail – five (5) Working Days after mailing,
- c) sent by email or telefax – one (1) Working Day after transmission.

32. Taxes and Duties

Delete the final sentence of 32.3 and replace with the following:

- . In this regard, it is the responsibility of the Tenderer to submit evidence in the form of a valid Tax Compliance Status PIN issued by SARS to the CCT at the Supplier Management Unit located within the Supplier Management / Registration Office, 2nd Floor (Concourse Level), Civic Centre, 12 Hertzog Boulevard, Cape Town (Tel 021 400 9242/3/4/5), or included with this tender.

Add the following after clause 32.3:

32.4 The VAT registration number of the CCT is 4500193497.

ADDITIONAL CONDITIONS OF CONTRACT

Add the following Clause after Clause 34:

35. Reporting Obligations

35.1 The Supplier shall complete, sign and submit with each delivery note, all the documents as required in the Specifications including Monthly Project Labour Reports (Annexure B). Any failure in this regard may result in a delay in the processing of payments.

C.7 GENERAL CONDITIONS OF CONTRACT

(National Treasury - General Conditions of Contract (revised July 2010))

TABLE OF CLAUSES

1. Definitions
2. Application
3. General
4. Standards
5. Use of contract documents and information; inspection
6. Patent rights
7. Performance security
8. Inspections, tests and analysis
9. Packing
10. Delivery and documents
11. Insurance
12. Transportation
13. Incidental services
14. Spare parts
15. Warranty
16. Payment
17. Prices
18. Contract amendments
19. Assignment
20. Subcontracts
21. Delays in the supplier's performance
22. Penalties
23. Termination for default
24. Dumping and countervailing duties
25. Force majeure
26. Termination for insolvency
27. Settlement of disputes
28. Limitation of liability
29. Governing language
30. Applicable law
31. Notices
32. Taxes and duties
33. National Industrial Participation Programme (NIPP)
34. Prohibition of restrictive practices

1. Definitions

1. The following terms shall be interpreted as indicated:

1.1 'Closing time' means the date and hour specified in the bidding documents for the receipt of bids.

1.2 'Contract' means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the Parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

1.3 'Contract price' means the price payable to the supplier under the contract for the full and proper performance of his or her contractual obligations.

1.4 'Corrupt practice' means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in contract execution.

1.5 'Countervailing duties' are imposed in cases in which an enterprise abroad is subsidised by its government and encouraged to market its products internationally.

- 1.6 'Country of origin' means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognised new product results that is substantially different in basic characteristics or in purpose or utility from its components.
- 1.7 'Day' means calendar day.
- 1.8 'Delivery' means delivery in compliance with the conditions of the contract or order.
- 1.9 'Delivery ex stock' means immediate delivery directly from stock actually on hand.
- 1.10 'Delivery into consignee's store or to his site' means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
- 1.11 'Dumping' occurs when a private enterprise abroad markets its goods on its own initiative in the RSA at lower prices than that of the country of origin, and which action has the potential to harm the local industries in the RSA.
- 1.12 'Force majeure' means an event beyond the control of the supplier, not involving the supplier's fault or negligence, and not foreseeable. Such events may include, but are not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.
- 1.13 'Fraudulent practice' means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial, non-competitive levels and to deprive the bidder of the benefits of free and open competition.
- 1.14 'GCC' means the General Conditions of Contract.
- 1.15 'Goods' means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.
- 1.16 'Imported content' means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.
- 1.17 'Local content' means that portion of the bidding price which is not included in the imported content, provided that local manufacture does take place.
- 1.18 'Manufacture' means the production of products in a factory using labour, materials, components and machinery, and includes other, related value-adding activities.
- 1.19 'Order' means an official written order issued for the supply of goods or works or the rendering of a service.
- 1.20 'Project site', where applicable, means the place indicated in bidding documents.
- 1.21 'Purchaser' means the organisation purchasing the goods.
- 1.22 'Republic' means the Republic of South Africa.
- 1.23 'SCC' means the Special Conditions of Contract.

1.24 'Services' means those functional services ancillary to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance, and other such obligations of the supplier covered under the contract.

1.25 'Written' or 'in writing' means handwritten in ink or any form of electronic or mechanical writing.

2. Application

2.1 These general conditions are applicable to all bids, contracts and orders, including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.

2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.

2.3 Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

3. General

3.1 Unless otherwise indicated in the bidding documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable, a non-refundable fee for documents may be charged.

3.2 With certain exceptions, invitations to bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from www.treasury.gov.za.

4. Standards

4.1 The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.

5. Use of contract documents and information; inspection.

5.1 The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only as far as may be necessary for the purposes of such performance.

5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1, except for purposes of performing the contract.

5.3 Any document, other than the contract itself, mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so required by the purchaser.

5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

6. Patent rights

6.1 The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from the use of the goods or any part thereof by the purchaser.

7. Performance Security

7.1 Within 30 (thirty) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in the SCC.

- 7.2 The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contract.
- 1.3 The performance security shall be denominated in the currency of the contract or in a freely convertible currency acceptable to the purchaser, and shall be in one of the following forms:
- a) a bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or
 - b) A cashier's or certified cheque.
- 7.4 The performance security will be discharged by the purchaser and returned to the supplier not later than 30 (thirty) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified in the SCC.

8. Inspections, tests and analyses

- 8.1 All pre-bidding testing will be for the account of the bidder.
- 8.2 If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organisation acting on behalf of the Department.
- 8.3 If there are no inspection requirements indicated in the bidding documents and no mention of such is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.
- 8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.
- 8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.
- 8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.
- 8.7 Any contract supplies may on or after delivery be inspected, tested or analysed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier, who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with supplies which do comply with the requirements of the contract. Failing such removal, the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.
- 8.8 The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 23 of the GCC.

9. Packing

- 9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

- 9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in the SCC, and in any subsequent instructions ordered by the purchaser.

10. Delivery and documents

- 10.1 Delivery of the goods shall be made by the supplier in accordance with the terms specified in the contract. The details of shipping and/or other documents to be furnished by the supplier are specified in the SCC.
- 10.2 Documents to be submitted by the supplier are specified in the SCC.

11. Insurance

- 11.1 The goods supplied under the contract shall be fully insured, in a freely convertible currency, against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified in the SCC.

12. Transportation

- 12.1 Should a price other than an all-inclusive delivered price be required, this shall be specified in the SCC.

13. Incidental Services

- 13.1 The supplier may be required to provide any or all of the following services, including additional services (if any) specified in the SCC:
- (a) performance or supervision of on-site assembly, and/or commissioning of the supplied goods;
 - (b) furnishing of tools required for the assembly and/or maintenance of the supplied goods;
 - (c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
 - (d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the Parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and
 - (e) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.
- 13.2 Prices charged by the supplier for incidental services, if not included in the contract price for the goods, shall be agreed upon in advance by the Parties and shall not exceed the prevailing rates charged to other Parties by the supplier for similar services.

14. Spare parts

- 14.1 As specified in the SCC, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:
- (a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and
 - (b) in the event of termination of production of the spare parts:
 - (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
 - (ii) following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

15. Warranty

- 15.1 The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications), or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.

15.2 This warranty shall remain valid for 12 (twelve) months after the goods, or any portion thereof, as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for 18 (eighteen) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in the SCC.

15.3 The purchaser shall notify the supplier promptly, in writing, of any claims arising under this warranty.

15.4 Upon receipt of such notice, the supplier shall, within the period specified in the SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the purchaser.

15.5 If the supplier, having been notified, fails to remedy the defect(s) within the period specified in the SCC, the purchaser may proceed to take such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

16. Payment

16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in the SCC.

16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfilment of any other obligations stipulated in the contract.

16.3 Payments shall be made promptly by the purchaser, but in no case later than 30 (thirty) days after submission of an invoice or claim by the supplier.

16.4 Payment will be made in Rand unless otherwise stipulated in the SCC.

17. Prices

17.1 Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices tendered by the supplier in his bid, with the exception of any price adjustments authorized in the SCC or in the purchaser's request for bid validity extension, as the case may be.

18. Contract Amendments

18.1 No variation in or modification of the terms of the contract shall be made except by written amendment signed by the Parties concerned.

19. Assignment

19.1 The supplier shall not assign, in whole or in part, its obligations to perform under the contract, except with the purchaser's prior written consent.

20. Subcontracts

20.1 The supplier shall notify the purchaser in writing of all subcontracts awarded under this contract if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.

21. Delays in the supplier's performance

21.1 Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.

21.2 If at any time during the performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his or her discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the Parties by amendment of contract.

- 21.3 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.
- 21.4 The right is reserved to procure, outside of the contract, small quantities of supplies; or to have minor essential services executed if an emergency arises, or the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.
- 21.5 Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.
- 21.6 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without cancelling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and, without prejudice to his other rights, be entitled to claim damages from the supplier.

22. Penalties

- 22.1 Subject to GCC Clause 25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the contract, the purchaser shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services, using the current prime interest rate, calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the contract pursuant to GCC Clause 23.

23. Termination for default

- 23.1 The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:
- (a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
 - (b) if the supplier fails to perform any other obligation(s) under the contract; or
 - (c) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.
- 23.2 In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.
- 23.3 Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.
- 23.4 If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than 14 (fourteen) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated 14 (fourteen) days the purchaser may regard the intended penalty as not objected against and may impose it on the supplier.
- 23.5 Any restriction imposed on any person by the Accounting Officer/Authority will, at the discretion of the Accounting Officer/Authority, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person is or was, in the opinion of the Accounting Officer/Authority, actively associated.

23.6 If a restriction is imposed, the purchaser must, within 5 (five) working days of such imposition, furnish the National Treasury with the following information:

- (i) the name and address of the supplier and/or person restricted by the purchaser;
- (ii) the date of commencement of the restriction;
- (iii) the period of restriction; and
- (iv) the reasons for the restriction.

These details will be loaded in the National Treasury's central database of suppliers or persons prohibited from doing business with the public sector.

23.7 If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, Act 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period of not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction, and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.

24. Anti-dumping and countervailing duties and rights

24.1 When, after the date of bid, provisional payments are required, or anti-dumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidised import, the State is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable difference shall, on demand, be paid forthwith by the contractor to the State, or the State may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he or she delivered or rendered, or is to deliver or render in terms of the contract or any other contract or any other amount which may be due to him or her.

25. Force majeure

25.1 Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if, and to the extent that, his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

25.2 If a force majeure situation arises, the supplier shall notify the purchaser promptly, in writing, of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

26. Termination for insolvency

26.1 The purchaser may at any time terminate the contract by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the purchaser.

27. Settlement of Disputes

27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the Parties shall make every effort to resolve such dispute or difference amicably, by mutual consultation.

27.2 If, after 30 (thirty) days, the Parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.

27.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.

27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.

27.5 Notwithstanding any reference to mediation and/or court proceedings herein,

- (a) the Parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
- (b) the purchaser shall pay the supplier any monies due to the supplier.

28. Limitation of Liability

28.1 Except in cases of criminal negligence or wilful misconduct, and in the case of infringement pursuant to Clause 6:

- (a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and
- (b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

29. Governing language

29.1 The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the Parties shall also be written in English.

30. Applicable Law

30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in the SCC.

31. Notices

31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail, and any other notice to him shall be posted by ordinary mail, to the address furnished in his bid or to the address notified later by him in writing; and such posting shall be deemed to be proper service of such notice.

31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

32. Taxes and Duties

32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, licence fees, and other such levies imposed outside the purchaser's country.

32.2 A local supplier shall be entirely responsible for all taxes, duties, licence fees, etc., incurred until delivery of the contracted goods to the purchaser.

32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.

33. National Industrial Participation (NIP) Programme

33.1 The NIP Programme administered by the Department of Trade and Industry shall be applicable to all contracts that are subject to the NIP obligation.

34 Prohibition of Restrictive practices

34.1 In terms of section 4 (1) (b) (iii) of the Competition Act, Act 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 collusive bidding (or bid rigging).

- 34.2 If a bidder(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has/have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act, Act 89 of 1998.
- 34.3 If a bidder(s) or contractor(s) has/have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered, and/or terminate the contract in whole or part, and/or restrict the bidder(s) or contractor(s) from conducting business with the public sector for a period not exceeding 10 (ten) years and/or claim damages from the bidder(s) or contractor(s) concerned.

C.8 ANNEXURES

Annexure A – Pro Forma Insurance Broker’s Warranty

Broker Logo

Letterhead of supplier’s Insurance Broker

Date _____

CCT
City Manager
Civic Centre
12 Hertzog Boulevard
Cape Town
8000

Dear Sir

TENDER NO.: 51C/2026/27

TENDER DESCRIPTION: The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services.

NAME OF SUPPLIER: _____

I, the undersigned, do hereby confirm and warrant that all the insurances required in terms of the abovementioned contract have been issued and/or in the case of blanket/umbrella policies, have been endorsed to reflect the interests of the CCT with regard to the abovementioned contract, and that all the insurances and endorsements, etc., are all in accordance with the requirements of the contract.

I furthermore confirm that all premiums in the above regard have been paid.

Yours faithfully

Signed: _____

For: _____ (Supplier’s Insurance Broker)

Annexure B – Monthly Project Labour Report

ANNEX 1

CITY OF CAPE TOWN MONTHLY PROJECT LABOUR REPORT



CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

Instructions for completing and submitting forms

General

- The Monthly Project Labour Reports must be completed in full, using typed, proper case characters; alternatively, should a computer not be available, handwritten in black ink.
- Incomplete / incorrect / illegible forms will not be accepted.
- Any conditions relating to targeted labour stipulated in the Contract (in the case of contracted out services or works) shall apply to the completion and submission of these forms.
- This document is available in Microsoft Excel format upon request from the City's EPWP office, tel 021 400 9406, email EPWPLR@capetown.gov.za.

Project Details

- If a field is not applicable insert the letters: NA
- Only the Project Number supplied by the Corporate EPWP Office must be inserted.
The Project Number can be obtained from the Coordinator or Project Manager or from the e-mail address in point 4 above.
- On completion of the contract or works project the anticipated end date must be updated to reflect the actual end date.

Beneficiary Details and Work Information

- Care must be taken to ensure that beneficiary details correspond accurately with the beneficiary's ID document.

- A new beneficiary is one in respect of which a new employment contract is signed in the current month. A certified ID copy must accompany this labour report on submission.
- Was the beneficiary sourced from the City's job seeker database?
- The contract end date as stated in the beneficiary's employment contract.
- Where a beneficiary has not worked in a particular month, the beneficiary's name shall not be reflected on this form at all for the month in question.
- Training will be recorded separately from normal working days and together shall not exceed the maximum of 23 days per month
- Workers earning more than the maximum daily rate (currently R450 excluding any benefits) shall not be reflected on this form at all.

Submission of Forms

- Signed hardcopy forms must be scanned and submitted to the City's project manager in electronic (.pdf) format, together with the completed form in Microsoft Excel format.
- Scanned copies of all applicable supporting documentation must be submitted along with each monthly project labour report. Copies of employment contracts and ID documents are only required in respect of new beneficiaries.
- If a computer is not available hardcopy forms and supporting documentation will be accepted.

PROJECT DETAILS

Numbers in cells below e.g (6) refer to the relevant instruction above for completing and submitting forms

CONTRACT OR WORKS PROJECT NAME: (6)		EPWP SUPPLIED PROJECT NUMBER: (6)	
DIRECTORATE:		DEPARTMENT:	
CONTRACTOR OR VENDOR NAME:		CONTRACTOR OR VENDOR E-MAIL ADDRESS:	
CONTRACTOR OR VENDOR CONTACT PERSON:		CONTRACTOR OR VENDOR TEL. NUMBER:	CELL WORK
PROJECT LABOUR REPORT CURRENT MONTH (mark with "X")			
JAN	FEB	MAR	APR
MAY	JUN	JUL	AUG
SEP	OCT	NOV	DEC
YEAR			

ACTUAL START DATE (yyyy/mm/dd)		ANTICIPATED / ACTUAL END DATE (yyyy/mm/dd) (7)	
TOTAL PROJECT EXPENDITURE / VALUE OF WORK DONE TO-DATE (INCLUDING ALL COSTS, BUT EXCLUDING VAT)			
R			

ANNEX 1 (continued)

MONTHLY PROJECT LABOUR REPORT

BENEFICIARY DETAILS AND WORK INFORMATION



CONTRACT OR WORKS PROJECT NUMBER:		Year		Month		Sheet						
						1 of						
No.	(8) First name	(8) Surname	(8) ID number	(9) New Beneficiary (Y/N)	Gender (M/F)	Disabled (Y/N)	(10) Job seeker database (Y/N)	Contract start date (DDMMYY)	(11) Contract end date (DDMMYY)	(12) No. days worked this month (excl. training)	(13) Training days	(14) Rate of pay per day (R – c)
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												
												0 0 R -
Declared by Contractor or Vendor to be true and correct:		Name		Signature								
		Date										
Received by Employer's Agent / Representative:		Name		Signature								
		Date										

Annexure C - Pro Forma Performance Security/ Guarantee

Not applicable

Annexure D - Pro Forma Advance Payment Guarantee

Not applicable

Approved Financial Institution as at 13 August 2025:

1.1 National Banks

ABSA Bank Limited
Firststrand Bank Limited
Investec Bank Limited
Nedbank Limited
Standard Bank of South Africa Limited

1.2 International Banks (with branches in South Africa)

Barclays Bank PLC
Citibank NA
Credit Agricole Corporate and Investment Bank
HSBC Bank PLC
JPMorgan Chase Bank
Societe Generale
Standard Chartered Bank

1.3 Insurance Companies

American International Group Inc (AIG)
Bryte Insurance Company Limited
Coface SA
Compass Insurance Company Limited
Credit Guarantee Insurance Corporation of Africa Limited
Guardrisk Insurance Company Limited
Hollard Insurance Company Limited
Infiniti Insurance Limited
Lombard Insurance Company Limited
Old Mutual Alternative Risk Transfer Insure Limited (OMART Insure)
New National Assurance Company Limited
PSG Konsult Ltd (previously Absa Insurance)
Regent Insurance Company Limited
Renasa Insurance Company Limited
Santam Limited

Annexure F - Tender Returnable Documents

Schedule F.1: Contract Price Adjustment
--

Not applicable

Schedule F.2: Certificate of Authority for Partnerships/ Joint Ventures/ Consortiums

This schedule is to be completed if the tender is submitted by a partnership/joint venture/ consortium.

1. We, the undersigned, are submitting this tender offer as a partnership/ joint venture/ consortium and hereby authorize Mr/Ms _____, of the authorised entity _____, acting in the capacity of Lead Partner, to sign all documents in connection with the tender offer and any contract resulting from it on the partnership/joint venture/ consortium's behalf.
2. By signing this schedule the partners to the partnership/joint venture/ consortium:
 - 2.1 warrant that the tender submitted is in accordance with the main business and objectives of the partnership/joint venture/ consortium;
 - 2.2 agree that the CCT shall make all payments in terms of this Contract into the following bank account of the Lead Partner:
 Account Holder: _____
 Financial Institution: _____
 Branch Code: _____
 Account No.: _____
 - 2.3 agree that in the event that there is a change in the partnership/ joint venture/ consortium and/or should a dispute arise between the partnership/joint venture/ consortium partners, that the CCT shall continue to make any/all payments due and payable in terms of the Contract into the aforesaid bank account until such time as the CCT is presented with a Court Order or an original agreement (signed by each and every partner of the partnership/joint venture/ consortium) notifying the CCT of the details of the new bank account into which it is required to make payment.
 - 2.4 agree that they shall be jointly and severally liable to the CCT for the due and proper fulfilment by the successful tenderer/supplier of its obligations in terms of the Contract as well as any damages suffered by the CCT as a result of breach by the successful tenderer/supplier. The partnership/joint venture/ consortium partners hereby renounce the benefits of excussion and division.

SIGNED BY THE PARTNERS OF THE PARTNERSHIP/ JOINT VENTURE/ CONSORTIUM		
NAME OF FIRM	ADDRESS	DULY AUTHORISED SIGNATORY
Lead partner		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....
		Signature..... Name..... Designation.....

Note: A copy of the Joint Venture Agreement shall be appended to *List of Other Documents Attached by Tenderer Schedule*.

Schedule F.3: Declaration for Procurement above R10 million

If the value of the transaction is expected to exceed R10 million (VAT included) the tenderer shall complete the following questionnaire, attach the necessary documents and sign this schedule:

1. Are you by law required to prepare annual financial statements for auditing? **(Please mark with X)**

YES		NO	
-----	--	----	--

If YES, submit audited annual financial statements:

- (i) For the past three years, or
(ii) Since the date of establishment of the tenderer (if established during the past three years)

By attaching such audited financial statements to **List of Other Documents Attached by Tenderer Schedule**.

2. Do you have any outstanding undisputed commitments for municipal services towards the CCT or other municipality in respect of which payment is overdue for more than 30 (thirty) days? **(Please mark with X)**

YES		NO	
-----	--	----	--

- 2.1 If NO, this serves to certify that the tenderer has no undisputed commitments for municipal services towards any municipality for more than three (3) (three) months in respect of which payment is overdue for more than 30 (thirty) days.

- 2.2 If YES, provide particulars:

3. Has any contract been awarded to you by an organ of state during the past five (5) years? **(Please mark with X)**

YES		NO	
-----	--	----	--

If YES, insert particulars in the table below including particulars of any material non-compliance or dispute concerning the execution of such contract. Alternatively attach the particulars to **List of Other Documents Attached by Tenderer** schedule in the same format as the table below:

Organ of State	Contract Description	Contract Period	Non-compliance/dispute (if any)

4. Will any portion of the goods or services be sourced from outside the Republic, and if so, what portion and whether any portion of payment from the CCT is expected to be transferred out of the Republic? **(Please mark with X)**

YES		NO	
-----	--	----	--

If YES, furnish particulars below

The tenderer hereby certifies that the information set out in this schedule and/or attached hereto is true and correct, and acknowledges that failure to properly and truthfully complete this schedule may result in steps being taken against the tenderer, the tender being disqualified, and/or (in the event that the tenderer is successful) the cancellation of the contract, restriction of the tenderer or the exercise by the CCT of any other remedies available to it.

Signature
Print name:
On behalf of the tenderer (duly authorised)

Date

Schedule F.4: Preference Points Claim Form In Terms Of the 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

The applicable preference point system for this tender is the 90/10 preference point system.

- 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	10
SPECIFIC GOALS	90
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

The following definitions shall apply to this schedule:

- (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**POINTS AWARDED FOR PRICE****THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

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

90/10

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

NOT APPLICABLE

5. POINTS AWARDED FOR SPECIFIC GOALS

5.1 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:

5.2 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 (SG) – Points Allocated and Claimed

Tenderers must indicate the preference points claimed for each specific goal applicable to them, for the purposes of this tender.

(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.)

The specific goals allocated points in terms of this tender	To be Completed by the Organ of State	To be Completed by the Tenderer
	Number of points Allocated (90/10 system)	Number of points claimed (90/10 system)
Promotion of Micro and Small Enterprises	4	
Enterprise Supplier Development and Socio-Economic Development	3	
Skills Development <u>OR</u> Employee Share Scheme	3	

DECLARATION WITH REGARD TO COMPANY/FIRM

5.3 Name of company/firm.....

5.4 Company registration number:

5.5 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]

5.6 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 4.1 and 4.2, the Supplier 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 Supplier, 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.

<i>Signature of Tenderer</i>	<i>Date</i>	<i>Name and Surname</i>	<i>Address</i>

For official use.		
SIGNATURE OF CCT OFFICIALS AT TENDER OPENING		
1.	2.	3.

Table 2**: Specific Goals – Declaration by the Tenderer**

Tenderers must complete this table to declare the amounts and percentages applicable to the specific goals they are claiming.

NB: In completing Table 2 below, please consult **Notes for Verification** below

The specific goals allocated points in terms of this tender	To be Completed by the Tenderer	
	Refer to “Notes for verification”	Amount Declared (excluding VAT)
<u>SG1</u> Promotion of Micro and Small Enterprises	(i) Total Turnover	
<u>SG2</u> Enterprise Supplier Development and Socio Economic Development	(ii) Total Enterprise Supplier Development Expenditure	
	(iii) Total Socio Economic Development Expenditure	
	(iv) Total Expenditure	
<u>SG3.1</u> Skills Development	(v) Total Skills Development Expenditure	
	(iv) Total Expenditure	
OR <u>SG3.2</u> Employee Share Scheme	(vii) Employee Share Scheme Ownership %	

Tenderer Confirmation:

I confirm that the amounts declared in Table 2 above are accurate and in accordance with the ‘*The Broad-Based Black Economic Empowerment (B-BBEE) Act 53 of 2003, as amended.*’

Signature of Tenderer	Date	Name and	Address

(Authorised to represent the tenderer)		Surname	
--	--	---------	--

Notes for Verification:

All amounts disclosed should be as per the most recent Annual Financial Statements (not older than 12 months) and defined as per the B-BBEE Act

- SG1 – Specific Goal 1
Promotion of Micro and Small Enterprises
 (i) Total Turnover
 Micro enterprises with a turnover of up to R20million and Small enterprises with a turnover up to R80 million, as per National Small Enterprise Act, 1996 (Act No.102 of 1996)
- SG2 – Specific Goal 2
Enterprise Supplier Development and Socio-Economic Development
 (ii) Total Enterprise Supplier Development Expenditure
 Qualifying expenditure as defined in the B-BBEE Act: Statement 400 "THE GENERAL PRINCIPLES FOR MEASURING ENTERPRISE AND SUPPLIER DEVELOPMENT"

 (iii) Total Enterprise Socio Economic Development Expenditure
 Qualifying expenditure as defined in the B-BBEE Act: Statement 500 "THE GENERAL PRINCIPLES FOR MEASURING THE SOCIO - ECONOMIC DEVELOPMENT ELEMENT"

 (iv) Total Expenditure
 Total Expenditure as per the most recent Annual Financial Statements (not older than 12 months)
- SG3.1 – Specific Goal 3
Skills Development
 (v) Total Skills Development Expenditure
 Qualifying expenditure as defined in the B-BBEE Act: Statement 300 "THE GENERAL PRINCIPLES FOR MEASURING SKILLS DEVELOPMENT"

 (iv) Total Expenditure
 Total Expenditure as per the most recent Annual Financial Statements (not older than 12 months)
- SG3.2 – Specific Goal 3
Employee Share Scheme
 (vii) Employee Share Scheme Ownership %
 Total employee ownership as per employee share certificate at the date of tender closing.

The below table (Table 3) must be completed by a B-BBEE Verification Agency (*Note 1) **OR** Commissioner of Oaths

(Refer to *Note 3.2 for the detailed declaration):

Table 3:

Signature and Stamp	Date	Name and Surname	Address

Note 1*1.1 Tendering entity that undergoes B-BBEE verification**

- Where a tendering entity undergoes B-BBEE verification, a B-BBEE certificate valid as at the date of tender closing, must be attached to the bid submission or must be made available upon request within the specified period.
- All amounts disclosed in Table 2, should be amounts used in the B-BBEE verification process undergone by the tendering entity
- The B-BBEE verification agency must complete Table 3 above, to confirm the following amounts disclosed by the bidder in Table 2:
 - (ii) Total Enterprise Supplier Development Expenditure;
 - (iii) Total Socio Economic Development Expenditure;
 - (v) Total Skills Development Expenditure
- Where the tendering entity is a Joint Venture/ Consortium, the amounts in Table 2 must be consolidated, with an accompanying consolidated B-BBEE certificate valid as at the date of tender closing must be attached to the bid submission or must be made available upon request within the specified period.

1.2 If the tendering entity does not undergo B-BBEE verification and qualifies as a B-BBEE Qualifying Small Enterprise (QSE) and Exempted Micro-Enterprises (EME)

- Table 3 must be completed by a Commissioner of Oaths to confirm the following amounts disclosed by the bidder in Table 2:
 - (ii) Total Enterprise Supplier Development Expenditure;
 - (iii) Total Socio Economic Development Expenditure;
 - (v) Total Skills Development Expenditure

Note 2*2.1 The tendering entity must attach with the bid submission or must be made available upon request within the specified period; the most recent (where applicable) audited financial statements to enable validation of the following amounts disclosed by the bidder in Table 2:**

- (i) Total Turnover
- (iv) Total Expenditure

2.2 Companies who are required to be audited by legislation, must submit audited financial statements, not older than 12 months with the bid submission or must be made available upon request within the specified period.

***Note 3**

Sworn affidavit to be deposed by the Commissioner of Oaths to the QSE or EME.

I, the undersigned,

Full Name and Surname (Authorised to represent the tenderer)	
Identity Number	

Hereby declare under oath as follows

3.1 The contents of this statement are to the best of my knowledge a true reflection of facts.

3.2 I am a Member/ Director/ Owner of the following enterprise and am duly authorised to act on its behalf.

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Enterprise Physical Address:	
Type of Entity (CC, Pty (Ltd), Sole Prop etc):	
Nature of Business:	

3.3 I hereby declare under oath that based on the Financial Statements / Management Accounts and information available on the latest financial year end _____

3.3.1 The annual Total Revenue was less than R50 000 000.00 (Fifty Million Rand);

3.3.2 The following amounts disclosed in Table 2 are accurate, complete, consistent with the BBBEE Act (see Notes for Verification) and based on the Financial Statements / Management Accounts and information available on the latest financial year end _____

As per Table 2	Amount Declared (excluding VAT)
(ii) Total Enterprise Supplier Development Expenditure	
(iii) Total Socio Economic Development Expenditure	
(iv) Total Expenditure	

As per Table 2	Amount Declared (excluding VAT)
(v) Total Skills Development Expenditure	
(vi) Employee Share Scheme Ownership %	

3.4 I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent I this matter.

3.5 The sworn affidavit will be valid for a period of 12 months from the date signed by the commissioner.

Commissioner of Oaths

Signature, Date and Stamp

Deponent Signature and Date

3.6 KEY NOTES OF DETERMINING VALIDITY OF SWORN AFFIDAVITS

BBBEE Certificates/ Sworn Affidavits	Returnable for declaration requirement must be attached with the bid submission or must be made available upon request within the specified period - Certified and Valid copy of BBBEE Certificate issued by a SANAS Accredited Verification Agent, or - Certified and Valid copy of Sworn Affidavit for either EME or QSE (see key notes below to determine Validity of a Sworn Affidavit); or - Valid copy of BBBEE Certificate issued by CIPC for EME's only KEY NOTES OF DETERMINING VALIDITY OF SWORN AFFIDAVITS Tenderers submitting Sworn Affidavits must ensure that the affidavits meet the following key pointers to ensure their validity: (a) Name/s of deponent as they appear in the identity document and the identity number. (b) Designation of the deponent as the Director/ Member must be indicated in order to know that person is duly authorised to depose of an affidavit (mark the applicable
---	--

	option). (c) Name of enterprise as per enterprise registration documents issued by CIPC, where applicable, and enterprise business address. (d) Amounts as per Table 2 must be inserted (No blank spaces to be left). (e) Indicate total revenue for the year under review and whether it is based on audited financial statements or management accounts (mark the applicable option). (f) Financial year end as per the enterprise's registration documents, which was used to determine the total revenue (financial year end to be stipulated by day/ month/ year). (g) Date deponent signed and date of Commissioner of Oath must be the same. (The sworn affidavit must be signed in the presence of the Commissioner of Oath. Furthermore the Commissioner must also sign ad stamp). (h) Commissioner of Oath cannot be an employee or ex officio of the enterprise because, a person cannot by law, commission a sworn affidavit in which they have an interest. If the relevant documentation/ information as stipulated in the enquiry is not submitted and/or does not meet the above requirements; tenderers will be disqualified.
--	---

Schedule F.5: Declaration of Interest – State Employees (MBD 4 amended)

1. No bid will be accepted from:
 - 1.1 persons in the service of the state¹, or
 - 1.2 if the person is not a natural person, of which any director, manager or principal shareholder or stakeholder is in the service of the state, or
 - 1.3 from persons, or entities of which any director, manager or principal shareholder or stakeholder, has been in the service of the City of Cape Town (CCT) during the previous twelve (12) months, or
 - 1.4 from an entity who has employed a former CCT employee who was at a level of T14 or higher at the time of leaving the CCT's employ and involved in any of the CCT's bid committees for the bid submitted, if:
 - 1.4.1 the CCT employee left the CCT's employment voluntarily, during the previous twelve (12) months;
 - 1.5 a person who was a CCT employee, or an entity that employs a CCT employee, if
 - 1.5.1 the CCT employee left the CCT's employment whilst under investigation for alleged misconduct, or
 - 1.5.2 was facing disciplinary action or potential disciplinary action by the CCT, or
 - 1.5.3 was involved in a dispute against the CCT during the previous thirty six (36) months.

2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the tenderer or their authorised representative declare their position in relation to the evaluating/adjudicating authority.

3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.
 - 3.1 Full Name of tenderer or his or her representative: _____
 - 3.2 Identity Number: _____
 - 3.3 Position occupied in the Company (director, trustee, shareholder²): _____
 - 3.4 Company or Close Corporation Registration Number: _____
 - 3.5 Tax Reference Number: _____
 - 3.6 VAT Registration Number: _____
 - 3.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.
 - 3.8 Are you presently in the service of the state? **YES / NO**
 - 3.8.1 If yes, furnish particulars: _____
 - 3.9 Have you been in the service of the state for the past twelve months? **YES / NO**
 - 3.9.1 If yes, furnish particulars: _____
 - 3.10 Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**
 - 3.10.1 If yes, furnish particulars: _____
 - 3.11 Are you, aware of any relationship (family, friend, other) between any other tenderer and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? **YES / NO**
 - 3.11.1 If yes, furnish particulars: _____
 - 3.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**
 - 3.12.1 If yes, furnish particulars: _____

3.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

3.13.1 If yes, furnish particulars: _____

3.14 Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract? **YES / NO**

3.14.1 If yes, furnish particulars: _____

3.15 Have you, or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company been in the service of the CCT in the past twelve months? **YES / NO**

3.15.1 If yes, furnish particulars: _____

3.16 Do you have any employees who was in the service of the CCT at a level of T14 or higher at the time they left the employ of the CCT, and who was involved in any of the CCT's bid committees for this bid? **YES / NO**

3.16.1 If yes, furnish particulars: _____

4. Full details of directors / trustees / members / shareholders

Full Name	Identity Number	State Employee Number

If the above table does not sufficient to provide the details of all directors / trustees / shareholders, please append full details to the tender submission.

The tenderer hereby certifies that the information set out in this schedule and/or attached hereto is true and correct, and acknowledges that failure to properly and truthfully complete this schedule may result in steps being taken against the tenderer, the tender being disqualified, and/or (in the event that the tenderer is successful) the cancellation of the contract, restriction of the tenderer or the exercise by the CCT of any other remedies available to it.

Signature

Print name:

Date

On behalf of the tenderer (duly authorised)

'MSCM Regulations: "in the service of the state" means to be –

(a) a member of –

- (i) any municipal council;**
- (ii) any provincial legislature; or**
- (iii) the national Assembly or the national Council of provinces;**

(b) a member of the board of directors of any municipal entity;

(c) an official of any municipality or municipal entity;

(d) an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999);

(e) an executive member of the accounting authority of any national or provincial public entity; or

(f) an employee of Parliament or a provincial legislature.

² **Shareholder" means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.**

Schedule F.6: Conflict of Interest Declaration

1. The tenderer shall declare whether it has any conflict of interest in the transaction for which the tender is submitted. **(Please mark with X)**

YES		NO	
-----	--	----	--

1.1 If yes, the tenderer is required to set out the particulars in the table below:

2. The tenderer shall declare whether it has directly or through a representative or intermediary promised, offered or granted:

2.1 Any inducement or reward to the CCT for or in connection with the award of this contract; or

2.2 Any reward, gift, favour or hospitality to any official or any other role player involved in the implementation of the supply chain management policy. **(Please mark with X)**

YES		NO	
-----	--	----	--

If yes, the tenderer is required to set out the particulars in the table below:

Should the tenderer be aware of any corrupt or fraudulent transactions relating to the procurement process of the CCT, please contact the following:

The CCT's anti-corruption hotline at 0800 32 31 30 (toll free)

The tenderer hereby certifies that the information set out in this schedule and/or attached hereto is true and correct, and acknowledges that failure to properly and truthfully complete this schedule may result in steps being taken against the tenderer, the tender being disqualified, and/or (in the event that the tenderer is successful) the cancellation of the contract, restriction of the tenderer or the exercise by the CCT of any other remedies available to it.

Signature
Print name:
On behalf of the tenderer (duly authorised)

Date

Schedule F.7: Declaration of Tenderer's Past Supply Chain Management Practices (MBD 8)

Where the entity tendering is a partnership/joint venture/consortium, each party to the partnership/joint venture/consortium must sign a declaration in terms of the Municipal Finance Management Act, Act 56 of 2003, and attach it to this schedule.

- 1 The tender offer of any tenderer may be rejected if that tenderer or any of its directors/members have:
 - a) abused the municipality's / municipal entity's supply chain management system or committed any fraudulent conduct in relation to such system;
 - b) been convicted for fraud or corruption during the past five years;
 - c) willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d) been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004) or Database of Restricted Suppliers.
- 2 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
2.1	Is the tenderer or any of its directors/members listed on the National Treasury's Database of Restricted Suppliers as companies or persons 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 Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
2.1.1	If so, furnish particulars:		
2.2	Is the tenderer or any of its directors/members 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) or Database of Restricted Suppliers? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
2.2.1	If so, furnish particulars:		
2.3	Was the tenderer or any of its directors/members 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 ☐	No ☐
2.3.1	If so, furnish particulars:		

Item	Question	Yes	No
2.4	Does the tenderer or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes ☐	No ☐
2.4.1	If so, furnish particulars:		
2.5	Was any contract between the tenderer and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
2.5.1	If so, furnish particulars:		

The tenderer hereby certifies that the information set out in this schedule and/or attached hereto is true and correct, and acknowledges that failure to properly and truthfully complete this schedule may result in steps being taken against the tenderer, the tender being disqualified, and/or (in the event that the tenderer is successful) the cancellation of the contract,, restriction of the tenderer or the exercise by the CCT of any other remedies available to it.

 Signature
 Print name:
 On behalf of the tenderer (duly authorised)

 Date

Schedule F.8: Authorisation for the Deduction of Outstanding Amounts Owed to the CCT

To: THE CITY MANAGER, City of Cape Town

From: _____
(Name of tenderer)

RE: AUTHORISATION FOR THE DEDUCTION OF OUTSTANDING AMOUNTS OWED TO THE CCT

The tenderer:

- a) hereby acknowledges that according to SCM Regulation 38(1)(d)(i) the City Manager may reject the tender of the tenderer if any municipal rates and taxes or municipal service charges owed by the tenderer (or any of its directors/members/partners) to the CCT, or to any other municipality or municipal entity, are in arrears for more than 3 (three) months; and
- b) therefore hereby agrees and authorises the CCT to deduct the full amount outstanding by the Tenderer or any of its directors/members/partners from any payment due to the tenderer; and
- c) confirms the information as set out in the tables below for the purpose of giving effect to b) above;

Physical Business address(es) of the tenderer	Municipal Account number(s)	Inside the CCT municipal boundary (Yes/No)

If there is not enough space for all the names, please attach the information to **List of other documents attached by tenderer** schedule in the same format:

Name of Director / Member / Partner	Identity Number	Physical residential address of Director / Member / Partner	Municipal Account number(s)	Inside the CCT municipal boundary (Yes/No)

The tenderer hereby certifies that the information set out in this schedule and/or attached hereto is true and correct, and acknowledges that failure to properly and truthfully complete this schedule may result in steps being taken against the tenderer, the tender being disqualified, and/or (in the event that the tenderer is successful) the cancellation of the contract, restriction of the tenderer or the exercise by the CCT of any other remedies available to it.

Signature
Print name:
On behalf of the tenderer (duly authorised)

Date

Schedule F.9: Certificate of Independent Tender Determination

I, the undersigned, in submitting this tender number **51C/2026/27** and tender description: **The Provision of People, Management, Leadership Development, Organisational Design and Innovation professional services** in response to the tender invitation made by THE CCT, do hereby make the following statements, which I certify to be true and complete in every respect:

I certify, on behalf of: _____ (Name of tenderer) that:

1. I have read and I understand the contents of this Certificate;
2. I understand that this tender will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorised by the tenderer to sign this Certificate, and to submit this tender, on behalf of the tenderer;
4. Each person whose signature appears on this tender has been authorised by the tenderer to determine the terms of, and to sign, the tender on behalf of the tenderer;
5. For the purposes of this Certificate and this tender, I understand that the word 'competitor' shall include any individual or organisation other than the tenderer, whether or not affiliated with the tenderer, who:
 - (a) has been requested to submit a tender in response to this tender invitation;
 - (b) could potentially submit a tender in response to this tender invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the tenderer and/or is in the same line of business as the tenderer.
6. The tenderer has arrived at this tender independently from and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium¹ will not be construed as collusive price quoting.
7. In particular, without limiting the generality of paragraphs 5 and 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation);
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit a tender;
 - (e) the submission of a tender which does not meet the specifications and conditions of the tender; or
 - (f) tendering with the intention not to win the contract.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this tender invitation relates.
9. The terms of this tender have not been and will not be disclosed by the tenderer, directly or indirectly, to any competitor, prior to the date and time of the official tender opening or of the awarding of the contract.
10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to tenders and contracts, tenders 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, Act 89 of 1998, and/o/r 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 10 (ten) years in terms of the Prevention and Combating of Corrupt Activities Act, Act 12 of 2004, or any other applicable legislation.

Signature

Print name:

On behalf of the tenderer (duly authorised)

Date

(¹ Consortium: 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.)

Schedule F.10: Proposed Deviations And Qualifications By Tenderer

The Tenderer should record any **proposed** deviations or qualifications they may wish to make to the tender documents in this Returnable Schedule. Alternatively, a tenderer may state such proposed deviations and qualifications in a covering letter attached to his tender and reference such letter in this schedule. Any proposed deviations or qualifications contained in a covering letter which is not referenced in this schedule will not be considered.

The Tenderer's attention is drawn to clause 2.3.7.2 of the Standard Conditions of Tender referenced in the Tender Data regarding the CCT's handling of material deviations and qualifications.

If no deviations or qualifications are proposed, the schedule hereunder is to be marked NIL and signed by the Tenderer.

PAGE	CLAUSE OR ITEM	PROPOSED DEVIATION OR QUALIFICATION

List relevant documentation attached in Schedule F.10 below.

 Signature
 Print name:
 On behalf of the tenderer (duly authorised)

 Date

Schedule F.11: List of Other Documents Attached By Tenderer
--

The tenderer has attached to this schedule, the following additional documentation:

	Date of Document	Title of Document or Description (refer to clauses / schedules of this tender document where applicable)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		

Attach additional pages if more space is required.

 Signature
 Print name:
 On behalf of the tenderer (duly authorised)

 Date

Schedule F.12: Record of Addenda to Tender Documents

We confirm that the following communications received from the CCT before the submission of this tender offer, amending the tender documents, have been taken into account in this tender offer:

	Date	Title or Details
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
Attach additional pages if more space is required.		

 Signature
 Print name:
 On behalf of the tenderer (duly authorised)

 Date

Schedule F.13: Information to be provided with the Tender
--

The following information shall be provided with the Tender (to be read in conjunction with the explanation of evaluation criteria per part as per minimum score for functionality in 2.2.1.1.5.2 in this tender:

Part A: Design, development and delivery of Leadership Development Programmes

Nr	Item	Confirmed - Please ✓
1	Experience - Projects completed in the last 5 years Experience in the design of content for leadership development programmes across four levels of leadership in large, complex organisations in the last 5 years (2021–present) - a) Supervisory / Team level, b) Heads and Management c) Senior Leadership Examples must include organisation size, scope, duration and programme design artefacts (e.g. curriculum structures, module outlines). (Completed schedule F.16)	
2	Experience - Tenderers must indicate the number of comparable organisations (3 000+ employees, similar complexity) for which they have designed leadership development content across all three (3) leadership levels. (Completed schedule F.16)	
3	Experience - The years of experience of the tenderer specifically in developing, creating and designing content/material/products for leadership development programmes and related interventions in large, complex organisations (3 000+ employees; multiple business units or divisions; several functional or geographic areas). (Completed schedule F.16)	
4	Facilitator/s Experience: Facilitator Experience in Large, Complex Organisations - Tenderers must demonstrate experience of facilitators delivering leadership development programmes (virtually and in person) within large, complex organisations (3 000 or more employees). (Completed schedules F.15, F.19 and F.20)	
5	Experience: Programme facilitation - Tenderers must provide examples of leadership development programme facilitation completed or currently in progress facilitation engagements within the last five (5) years (2021–present) (Completed schedule F.16)	
6	Experience: Scale of Comparable Experience - Tenderers must indicate the number of comparable organisations (3 000+ employees) for which leadership development programmes were facilitated across all three leadership levels (Completed schedule F.16)	
7	Technical expertise: Measurement Capability – Programme Effectiveness - Tenderers must describe their capability to support the measurement of leadership programme effectiveness during facilitation (Completed schedule F.16)	
8	Technical expertise: Reporting, Data Access and Close-Out Evidence - Tenderers must provide examples of reporting and close- out outputs relevant to facilitated programmes (Completed schedule F.16)	
9	Expertise - Technical Expertise - assesses the tenderer's proposed methodology and technical capability to design an effectiveness measurement framework for leadership development content for this contract. (Completed schedule F.16)	
10	Resources - The submission must clearly describe the people who will be assigned to City of Cape Town projects, including their roles, availability, and relevant experience in leadership programmes content development for large, complex organisations. (Completed schedules F.15, F.19 and F.20)	

TENDER NO:

11	Resources and delivery capability - Programme Resourcing and Capacity - Availability of employees from the service provider for City of Cape Town leadership development programmes facilitation (Completed schedules F.15, F.19 and F.20)	
12	Resources and delivery capability - Facilitation Logistics and Delivery - Tenderers must demonstrate the ability to support programme delivery logistics (Completed schedules F.15, F.19 and F.20)	

Part B: Organisational Development Interventions Design and Facilitation

Nr	Item	Confirmed - Please ✓
1	Experience- OD interventions designed and/or facilitated in the last five (5) years (projects initiated from 2021 to present) Tenderers must provide examples of OD interventions designed and facilitated within the required timeframe (Completed schedule F.16)	
2	Experience - Scale of Comparable Experience - Tenderers must indicate the number of organisations of comparable size and complexity (3 000+ employees) for which OD interventions were designed and/or facilitated (Completed schedule F.16)	
3	Facilitation Capability - OD Intervention Facilitation - Tenderers must provide Curriculum Vitae (CVs) for facilitators proposed for OD interventions. (Completed schedules F.15, F.19 and F.20)	
4	Expertise - Documentation Synthesis and Reporting of OD Outcomes - Tenderers must demonstrate an approach to capturing, synthesising, and reporting outcomes from OD facilitation interventions. (Completed schedules F.15, F.19 and F.20)	
5	Resources and Capacity - Tenderers must demonstrate sufficient capacity to support OD interventions at scale including key account managers, lead facilitators and facilitators (Completed schedules F.15, F.19 and F.20)	

Part C: Organisational Effectiveness and Innovation Functional Expertise

Nr	Item	Confirmed - Please ✓
1	Experience - delivering expert-led sessions in large organisations.- Tenderers must provide examples from the last five (5) years (2021–present) demonstrating delivery of expert-led engagements (Completed schedule F.16)	
2	Experience – Number of large, complex organisations served - Tenderers must submit a list of organisations to which Functional Expertise services were delivered within the last five (5) years (2021–present). (Completed schedule F.16)	
3	Audience Engagement & Expert Capability - Experience of proposed Functional Expert(s)- Tenderers must submit Curriculum Vitae (CVs) for each proposed Functional Expert using the mandatory CV template (Completed schedules F.15, F.19 and F.20)	
4	Content Relevance to OE&I - Evidence of relevant OE&I specialist domains covered - Tenderers must show that their expert(s) have delivered content in one or more OE&I functional areas. Each domain counts when BOTH are provided (Completed schedule F.16)	

TENDER NO:

5	Clear methodology for delivering expert content - Methodology for delivering expert content (Completed schedule F.16)	
6	Capacity to Support Delivery - Tenderers must name a Key Account Manager responsible for all coordination and communication. CV must show experience with learning/engagement projects. (Completed schedules F.15, F.19 and F.20)	
7	Capacity to Support Delivery - Ability to support large group sessions (e.g., 300+ participants - Tenderers must show they have the administrative and logistical capability to support large-scale sessions (Completed schedules F.15, F.19 and F.20)	

PART D: Employee and Leadership - 360 Degree Feedback tool

Nr	Item	Confirmed - Please ✓
1	Experience - Development based on sound theoretical principles and content of the online 360 feedback survey and report. User Accessibility and user friendliness of the system (Completed schedule F.16)	
2	Expertise: The content of the 360 degree feedback tool (Completed schedule F.16)	
3	Expertise - 360 Feedback Report (Completed schedule F.16)	
4	Expertise - Train the Trainer - The proposal includes feedback training in order for learning to be embedded and ensure effective engagement on outcomes. (Completed schedules F.15, F.19 and F.20)	
5	Expertise - Integration with leadership development programmes as well as mentoring and coaching programmes (Completed schedule F.16)	
6	Resources – Availability and experience of project employees for City of Cape Town 360 degree feedback tool (Completed schedules F.15, F.19 and F.20)	
7	Resources - Years of relevant experience of key employees responsible for train the trainer (Completed schedules F.15, F.19 and F.20)	

Part E: Change Management, Change Leadership Development and Establishing a Change Network

Nr	Item	Confirmed - Please ✓
1	Experience - Change Programmes completed in the last 5 years Examples of change management programmes that have been completed having progressed through the full change cycle including details of such programmes in large organisations of the same size and complexity as the CCT (a multi faceted organisation of 6 000 or more) (Completed schedule F.16)	
2	Experience - Change Leadership Development completed in the last 5 years - The proposal must provide details of demonstrated change leadership development expertise to produce and facilitate change leadership development programmes in large organisations of the same size and complexity as the CCT (a multi-faceted organisation of 6 000 or more) (Completed schedule F.16)	
3	Experience - Change Network established in the last 5 years Examples of Change Networks established including details of this in large organisations of the same size and complexity as the CCT (a multi-faceted organisation of 6 000 or more employees) (Completed schedule F.16)	
4	Expertise - Change Management Programmes completed in the last 5 years - The proposal must provide details of demonstrated expertise in rolling out Change Management programmes. The proposal provides details of the nature, size, scope and complexity of projects for which change management was provided (Completed schedule F.16)	
5	Expertise - Change Leadership Development Programmes completed in the last 5 years - The proposal must provide details of demonstrated expertise in rolling out Change Leadership Development programmes (Completed schedule F.16)	
6	Expertise - Establishment of a Change Network in the last 5 years The proposal must provide details of demonstrated expertise in establishing a Change Network (Completed schedule F.16)	
7	Resources - Availability of Change Management resources Availability of Change Leadership Development and Building Change Network resources (Completed schedules F.15, F.19 and F.20)	

Part F: Professional Services for Talent Management and Developmental Assessments

Nr	Item	Confirmed - Please ✓
1	Experience - Confirmation of experience as a company in providing Talent Management Consultants for facilitation of Talent Reviews, Succession Planning, and Assessment services in large multi-faceted organisations (Completed schedule F.16)	
2	Resources - Availability of Senior Talent Management Consultants, Talent Management Consultants, Organisational Psychologists, Junior Project Manager and Account Managers with relevant experience and capacity to deliver the required services (Completed schedules F.15, F.19 and F.20)	
3	Resources - Individual Senior Talent Management Consultants' relevant years of experience (Must be confirmed in CVs, demonstrating leadership in facilitation, succession planning, and talent strategy implementation) (Completed schedules F.15, F.19 and F.20)	

TENDER NO:

4	Resources - Individual Talent Management Consultants' relevant years of experience (Must be confirmed in CVs, indicating roles, responsibilities, and work completed) (Completed schedules F.15, F.19 and F.20)	
5	Resources - Individual Organisational Psychologist's relevant experience (Must be confirmed in CVs, with evidence of registration with HPCSA and experience in developmental and leadership assessments) (Completed schedules F.15, F.19 and F.20)	
6	Resources - Individual Account Manager Consultants' relevant years of experience (Must be confirmed in CVs, indicating roles, responsibilities, and work completed) (Completed schedules F.15, F.19 and F.20)	
7	Expertise (As per the CVs of the Senior Talent Management consultants/ Talent Management Consultants / Organisational Psychologists proposed for this tender) (Completed schedules F.15, F.19 and F.20)	
8	Digital Enablement - Talent Management Systems and Tools	

Part G: Integrated People Management, Organisational Design solutions and Business Improvement

Nr	Item	Confirmed - Please ✓
1	Experience - Confirmation of experience as a company in providing Human Capital Management (HCM) Consultants for strategic workforce planning / talent strategies (Completed schedule F.16)	
2	Experience - Individual HCM advisory consultants relevant years' experience (Must confirm in CV approach, experience and work completed) (Completed schedules F.15, F.19 and F.20)	
3	Experience - Individual Senior HCM advisory consultants relevant years' experience (Must confirm in CV approach, experience and work completed) (Completed schedules F.15, F.19 and F.20)	
4	Experience - Confirmation of experience as a company in providing Organisational Design Consultants (Completed schedules F.15, F.19 and F.20)	
5	Experience - Individual Organisational design consultants relevant years' experience. (Must confirm in CV approach, experience and work completed) (Completed schedules F.15, F.19 and F.20)	
6	Experience - Individual Senior Org design consultants relevant years' experience (Must confirm in CV approach, experience and work completed) (Completed schedules F.15, F.19 and F.20)	

TENDER NO:

7	Experience - Confirmation of experience as a company in providing Lean Six Sigma (Black Belt) experience (Completed schedules F.15, F.19 and F.20)	
8	Experience - Individual Lean Six Sigma (Black Belt) consultants relevant years' experience (Must confirm in CV approach, experience and work completed) (Completed schedules F.15, F.19 and F.20)	
9	Experience - Individual Lean Six Sigma consultants relevant years' experience (Must confirm in CV approach, experience and work completed) (Completed schedules F.15, F.19 and F.20)	
10	Resources - Availability of Senior HCM and HCM consultants. (Completed schedules F.15, F.19 and F.20)	
11	Resources - Availability of Senior Org Design consultants and Org design consultants. (Completed schedules F.15, F.19 and F.20)	
12	Resources - Number of project employees available with relevant experience to support people management and Org Design consultation processes. (Completed schedules F.15, F.19 and F.20)	
13	Resources - Availability of Lean Six Sigma and Senior Lean Six Sigma (Black Belt) consultants and specialists (Completed schedules F.15, F.19 and F.20)	
14	Expertise - As per the CVs of the HCM consultants proposed for this tender (Completed schedules F.15, F.19 and F.20)	
15	Expertise - As per the CVs of the Org Design consultants proposed for this tender (Completed schedules F.15, F.19 and F.20)	
16	Expertise - As per the CVs of the Lean Six Sigma consultants proposed for this tender (Completed schedules F.15, F.19 and F.20)	
17	Expertise - Leverage organisational design technology platform to process HCM inputs and support the overall process.	

Part H - Innovation Management Services

Nr	Item	Confirmed - Please ✓
1	Expertise of key personnel including allocation (competencies of the individuals involved as a collective team) include qualifications for the project team lead and team members (Completed schedules F.15, F.19 and F.20)	
2	Relevant experience in innovation and Design Thinking (with reference) over the past 5-10 years (Completed schedules F.17 and F.18)	

TENDER NO:

3	Previous projects of similar work in specified context of the tenderer - Development of Innovation strategy and implementation plan, Working in Local Government context in South Africa, Conducting Innovation Capability/Maturity Index Measure in organisations with similar complexity, Development of Innovation Case Studies and Development and facilitation of Innovation Programmes (Completed schedules F.17 and F.18)	
3	Approach & Methodology - Proposed approach for the development of the Innovation Strategy, Proposed approach for the Innovation Capability/Maturity Index measure, Proposed approach for the development of the Innovation Case Studies and Proposals for Innovation Programme development and facilitation (Completed schedules F.17, and F.18)	

 Signature
 Print name:
 On behalf of the tenderer (duly authorised)

 Date

Schedule F.14: Appeal Application
--

OFFICIAL RECEIPT
(Valid only if printed
by official cash
receipting machine)

IRISITI ESESIKWENI
(Isemthethweni kuphela
xa ishicilelwe
ngumatshini wokukhupa
irisiti osesikweni.)

AMPTELIKE KWITANSIE
(Geldig alleenlik indien deur
amptelike kontantvangs
masjien gedruk.)

GL DATA CAPTURE RECEIPT
(CASHIER TO RETAIN A COPY)

RECEIPT NO: _____

DATE: _____

SAP GL:

8	1	0	1	0	0
---	---	---	---	---	---

PROFIT CENTRE:

1	3	0	5	0	0	0	1
---	---	---	---	---	---	---	---

NAME/COMPANY NAME:

AMOUNT:

						R	3	0	0	-	0	0
--	--	--	--	--	--	---	---	---	---	---	---	---

SERVICE DEPARTMENT DETAILS-

DEPARTMENT: LEGAL SERVICES: APPEALS UNIT

EMAIL; MSA.Appeals@capetown.gov.za

CIVIC CENTRE IZIKO LOLUNTU BURGERSENTRUM

12 HERTZOG BOULEVARD CAPE TOWN 8001 P O BOX 298 CAPE TOWN 8000
www.capetown.gov.za

Making progress possible. Together.

Schedule F.15: Summary of Resources

This Schedule must be completed for each of the 8 parts (A – H) as listed in the functionality section of this tender document and with a clear indication of ALL the resources to be allocated by the tenderer (functionality score indicates required numbers). The content of the completed tables will serve as a summary and reference, however a detailed CV for each resource per Part, copies of professional registration (where applicable) and company profile with further elaboration of the resource requirements must also be submitted in the tender response. Please replicate the tables below and submit for each resource category for each of the 8 parts of the tender.

THE CONTENT IN THE TABLE BELOW IS AN EXAMPLE ONLY:

Part A: Content Development for Leadership Development Programmes

Resource	Name & Surname	Relevant Experience	Number of years relevant experience	Organisations experience gained in	HPCSA Professional registration
Strategic and Professional Advisor	Peter Hunter	Leadership programmes for executive leaders content development	10 years	BBM, ZAR, ITSA	Not required

 Signature
 Print name:
 On behalf of the tenderer (duly authorised)

 Date

Schedule F.16: Summary of Tenderer experience

This Schedule must be completed for each of the 8 parts (A – H) as listed in the functionality section of this tender document and with a clear indication of the tenderer's experience (functionality score indicates required years and number of projects). The content of the completed tables will serve as a summary and reference, however a detailed company profile with further elaboration of the tenderer's experience must also be submitted in the tender response. Please replicate the tables below and submit for each the parts from A - G of the tender excluding part H. Part H covered in schedules F.17 and F.18 in this tender document.

THE CONTENT IN THE TABLE BELOW IS AN EXAMPLE ONLY:

Part A: Content Development for Leadership Development Programmes

Relevant experience	Details of Organisations	Size of the team/s	Number of projects	Duration
Content development of the supervisory level development programme, management development programme and leadership programme	ABC	500 for supervisory, 100 for management development and 20 for leadership development	20 for supervisory level, 20 for management development and 10 for leadership development	2020 - 2024

 Signature
 Print name:
 On behalf of the tenderer (duly authorised)

 Date

TENDER NO:

Schedule F17 Part H: Innovation Management - Previous Projects in the last 5-10 years

No.	TYPE OF RELEVANT WORK PREVIOUSLY PERFORMED (e.g. PROJECT NAME)	CLIENT'S DETAILS (Where work was performed, company name & email)	START DATE OF CONTRACT	COMPLETION DATE OF CONTRACT
1				
2				
3				
4				
5				
6				
7				
8				

Note* Points will be allocated only in respect of projects carried out by the supplier that are of a similar nature to the works as described in this tender document.

Note* The tenderer may append additional pages if necessary.

Signature
Print name:
On behalf of the tenderer (duly authorised)

Date

TENDER NO:

Schedule F18: Part H: Innovation Management - Previous Projects in Local Government in the last 5-10 years

No.	TYPE OF RELEVANT WORK PREVIOUSLY PERFORMED IN LOCAL GOVERNMENT (e.g. PROJECT NAME)	CLIENT'S DETAILS <i>(Where work was performed, company name & email)</i>	START DATE OF CONTRACT	COMPLETION DATE OF CONTRACT
1				
2				
3				
4				
5				
6				
7				
8				

Note* Points will be allocated only in respect of projects carried out by the supplier that are of a similar nature to the works as described in this tender document.

Note* The tenderer may append additional pages if necessary.

Signature
Print name:
On behalf of the tenderer (duly authorised)

Date

Schedule F.19: Example of Curriculum Vitae

STANDARD CURRICULUM VITAE (CV) TEMPLATE

All tenderers must submit Curriculum Vitae (CVs using this standard template) for all personnel proposed for all parts of the tender. CVs not submitted in this format, or CVs omitting required information, may result in tenderers not achieving the required functionality score.

1. Personal Details

- Full Name:
- Professional Title / Role:
- Organisation:
- Contact Details (email and telephone):

2. Role(s) Proposed for This Tender

Tick all that apply and indicate the relevant Part(s):

- ☐ Leadership Content Designer
- ☐ Leadership Programme Facilitator
- ☐ Organisational Development (OD) Facilitator / Consultant
- ☐ Strategic / Professional Advisor
- ☐ Key Account Manager / Programme Manager
- ☐ Other, please specify.....

3. Summary of Relevant Professional Experience

Provide a brief summary (maximum five lines) outlining total years of relevant professional experience, primary areas of expertise, and experience most relevant to the City of Cape Town tender.

4. Experience in Large, Complex Organisations

Provide details of experience working in organisations with a large employee complement, multiple business units or divisions, and/or geographic spread. For each engagement specify the organisation name, approximate size, nature of complexity, and your role and responsibilities.

5. Role-Specific Experience

Complete only the sections relevant to the role(s) selected in Section 2 of this template.

Elaborate on the experience criteria as described in the minimum score for functionality criteria as per this tender.

6. Qualifications, Certifications and Professional Registrations

List relevant academic qualifications, certifications, and HPCSA registration details where psychometric tools are used.

7. Number of Years of Relevant Experience

Leadership Content Design: _____ years
 Leadership Programme Facilitation: _____ years
 Organisational Development & Team Interventions: _____ years
 Etc.

8. Availability and Declaration

I hereby declare that the information provided in this Curriculum Vitae is true and correct. I confirm my availability to support City of Cape Town interventions for the duration of the contract period, subject to appointment.

Signature: _____

Name: _____

Date: _____

Schedule F.20: DECLARATION OF RESOURCE AVAILABILITY
--

This declaration must be completed and signed by an authorised representative of the tenderer.

We, the undersigned, hereby declare that the personnel and resources listed in the tender submission are available and will be made available to support the delivery of services to the City of Cape Town, for the relevant part(s) of the tender. Should a resource no longer be available, the resource will be replaced by a person with the same level of experience, expertise and qualifications.

We confirm that the resources proposed possess the qualifications, experience, and role capability as set out in the tender submission and associated Curriculum Vitae, and that no material changes affecting resource availability are anticipated at the time of submission.

We further acknowledge that the City of Cape Town reserves the right to verify the availability of resources during the evaluation process and throughout the contract period.

Signed on behalf of the tenderer:

Tenderer Name: _____

Authorised Signatory (Name): _____

Designation: _____

Signature: _____

Date: _____