



## **INDEPENDENT DEVELOPMENT TRUST**

### **APPOINTMENT OF A SERVICE PROVIDER FOR THE REVIEW AND ANALYSIS OF THE IDT ORGANISATIONAL STRUCTURAL ARCHITECTURE:**

**TENDER NUMBER: IDT/CSU/HR/11/04/2022**

**CLOSING DATE: 05 May 2022 @ 12H00**

**TENDER VALIDITY PERIOD: 90 Days from Date of Closing**

**LATE TENDERS: WILL NOT BE ACCEPTED**

**BRIEFING SESSION: NOT APPLICABLE**

**NAME OF TENDER:** \_\_\_\_\_

**NAME OF DULY AUTHORIZED PERSON:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**TEL/ CELL NUMBER:** \_\_\_\_\_

**E-MAIL:** \_\_\_\_\_

**CSD NUMBER (if applicable):** \_\_\_\_\_

**ISSUED BY: Independent Development Trust**

Glenwood Office Park, cnr. Oberon & Sprite Streets, Faerie Glen, Pretoria

**Tel:** 0128452000 | **E-mail:** @idt.org.za

Contact person: Mr Sam Mathikhi

## PART A

## INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE INDEPENDENT DEVELOPMENT TRUST

BID NUMBER:	IDT/CSU/HR/11/04/2022	CLOSING DATE:	05 May 2022	CLOSING TIME:	12h00
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DESCRIPTION	<b>PROJECT NAME:</b>  <b>APPOINTMENT OF A SERVICE PROVIDER FOR THE REVIEW AND ANALYSIS OF THE IDT ORGANISATIONAL STRUCTURAL ARCHITECTURE.</b>
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BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED

Glenwood Office Park,  
Cnr Oberon & Sprite Streets,  
Faerie Glen  
Pretoria, 0043  
**Tel:** 0128452000

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	SCM: Mr. Sam Makhura	CONTACT PERSON	Mr Sam Mathikhi
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	<a href="mailto:SamM@idt.org.za">SamM@idt.org.za</a>	E-MAIL ADDRESS	Sam.Mathikhi@idt.org.za

## SUPPLIER INFORMATION

NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS	\			
TELEPHONE NUMBER	CODE		NUMBER	
CELLPHONE NUMBER				
FACSIMILE NUMBER	CODE		NUMBER	
E-MAIL ADDRESS				

VAT REGISTRATION NUMBER				
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: <b>MAAA</b>
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT : <b>Not compulsory</b>	[TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) WILL NOT BE COMPULSORY SINCE BIDDERS WILL NOT BE EVALUATED ACCORDING TO THE B-BBEE POINTS SYSTEM.]</b>				
<b>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES ENCLOSE PROOF]		<b>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>				
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?			<input type="checkbox"/> YES <input type="checkbox"/> NO	
<p><b>IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b></p>				

**PART B**

**TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3. THIS BID WILL NOT BE SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017,
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

(Proof of authority must be submitted e.g. company resolution if there is more than one Director/member)

DATE: .....

**BIDDER'S DISCLOSURE****1. PURPOSE OF THE FORM**

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

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

**2. Bidder's declaration**

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise, employed by the state?

YES / NO

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution?

YES / NO

2.2.1 If so, furnish particulars:

.....  
.....

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

2.3.1 If so, furnish particulars:

.....  
.....

### **3 DECLARATION**

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

3.1 I have read, and I understand the contents of this disclosure.

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

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

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

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

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

.....

Signature

Date

.....

Position

Name of bidder

# **IDT TERMS OF REFERENCE FOR THE REVIEW AND ANALYSIS OF THE IDT ORGANISATIONAL STRUCTURAL ARCHITECTURE**

## **1. INTRODUCTION**

### **1.1. THE INDEPENDENT DEVELOPMENT TRUST**

The Independent Development Trust (IDT) is a Schedule 2 Public Entity in terms of the Public Finance Management Act (Act No. 1 of 1999 as amended). It reports to Parliament through the Minister of Public Works and Infrastructure, its Executive Authority and Shareholder representative. It acts as a state implementing agency focusing on social infrastructure programme and project management and works with all spheres of government through client-specific service level agreements. The IDT has regional offices in all of the country's nine provinces with its National Office located in South Africa's administrative capital, Pretoria.

Established in 1990 with an endowment of R2 billion in 1991, the IDT worked with and provided funding to civil society organisations involved in community development initiatives to support education, housing, health services and business development projects. In 1997, through a Cabinet decision, its mandate was changed to that of an entity geared towards supporting government in the implementation of development programmes. In 1999, it was listed as a Schedule 2 public entity in terms of the Public Finance Management Act (PFMA) (Act 1 of 1999)

Since its establishment, the IDT has delivered a combination of social infrastructure such as public schools, clinics, community centres, government offices and social development programmes in predominantly rural communities across the country. In the past ten years the entity has delivered social infrastructure and community development programmes worth over R 45 billion.

### **1.2. BACKGROUND TO THE BID**

In recent years, the IDT has had to contend with a number of challenges which affected the rate and quality of its services to its clients. In response to these challenges, the entity undertook a number of turn around measures, many of which yielded less than desired outcome.

The IDT has recently adopted a new strategic pathway to build a compliant and fit-for-purpose entity whose operations are guided by sound commercial principles. It has embarked on a different strategic direction and trajectory, crafted the Turn-Around Plan and strategy in pursuance of the new strategic focus. To this end, it has become imperative that the organisational structural architecture needs to be examined and re-aligned with the new strategic posture of the organisation.

Following the conclusion of these exercises, the IDT seeks to appoint a service provider to assist the organisation review its new business model, improve and/or design business processes, design the



organisational structure and architecture that is fit for purpose and thus capable of assisting in the execution of the corporate strategy.

Specifically, the IDT needs to establish the right structure that can improve its ability to meet customer needs and create shareholder value. We need an effective organisation design that can help us achieve the following:

- Facilitate business strategy implementation.
- Drive value.
- Improve organisational performance.
- Raise the performance of the workforce; and
- Facilitate business transformation

## **2. PURPOSE AND OBJECTIVES**

The IDT invites service providers with the capability to design organisation structures that are aligned to the Corporate Plan and its mandates by, inter alia, looking at the complex relationships between objectives, tasks, workflow, responsibility and authority, and making sure all these support the objectives of the IDT. Good organisational design that helps communications, productivity and innovation, and creates an environment where people can work effectively.

The project purpose and objectives to be, inter alia, review and align the following:

- Strategic objectives and assess current organisation
- Organisation design drivers and organisation design principles
- Define future core capabilities and build an operating model
- Design organisation - Create High-Level Organization Structure, Complete Detailed Organization Design
- Transition and evolve organisation
- Re-design organisational operating model and align this to organisational goals and outcomes
- Conduct a comprehensive review of the current structural architecture and staff establishment and outline high risk areas therein.
- Identify appropriate roles, responsibilities and competencies needed to support the model
- Develop position descriptions and profiles and identify appropriate staffing levels (full time equivalents) required to support the model
- Grade/Evaluate the positions using Patterson
- Map employees to new roles on the organisation chart in line with relevant legal framework
- To review the current span of control within the organisation and make recommendations

- Identification of duplication and overlapping of functions
- Take into account the impact on the organizational structure government initiative on Insourcing of support services such as, cleaning; gardening and security
- Propose high-level implementation plan for the different Units and indicate clear deliverables and timeframes
- Review and re-alignment of HCM Strategy and Plan to Corporate Strategy and Mandates
- Conduct skills audit
- Draft a plan for the rationalisation and better utilisation of office space
- Develop and implement Change Management & Communications Plan

In order to do this, the service provider must be able to, inter alia, answer the following questions, answers of which should form part of your proposal:

**How fit for purpose is the current organisational structure?**

What improvements could be made to the organisational structure to effectively deliver programmes in accordance with the IDT Strategic Plan?

How could the organisational structure be made more cost effective?

How effective are the existing reporting lines to ensure that there is individual accountability for achieving organisational results?

Are the positions in the organisational structure appropriate for the goals the organisation is trying to reach?

What potential is there for creating efficiencies in the structure?

To what extent do current job descriptions accurately reflect what is expected of the positions?

**Number of Staff**

Does the organisation have the appropriate number of each position to meet organisational goals?

What new positions, if any, need to be created to ensure that the organisation can meet its goals and how feasible are they?

**3. SCOPE OF WORK**

The IDT requires the services of a single service provider who understands the built environment and the semi-government sector and that has the capacity and expertise to review and re-align the organisational structure for submission and approval by the Board of the IDT.

The service provider will be required to conduct the following scope of work:

- i. Study our strategic documents like the Corporate Plan/Turn-Around Plan to correctly place the context. Incorporate comments and prepare final proposal in line with the new strategic posture that the IDT has adopted.
- ii. Review, improve, map or re-engineer and automate business processes
- iv. Develop high-level and detailed organisation structural architecture aligned to corporate objectives
- v. Develop the proposed organisational structure taking into consideration the current staff composition and available financial resources.
- vi. Assess the alignment of the current structural architecture to Mandates, Strategy, Business Model and Business Processes and make recommendations
- vii. Assess the capacity and utilisation of people and make recommendations
- viii. Assess the utilisation of technology and other resources in carrying out Mandates and how these impact on the Structure.
- ix. Assess existing facilities like office space and recommend accordingly
- x. Develop reward and remuneration philosophy and policy
- xi. Develop organisational competency framework
- xii. Conduct Skills Audit
- xiii. Consider the organisational study, job evaluation and job descriptions already undertaken. There may be a need for some realignment and further refinement.
- xiv. Review current human resource policies and align with established mandate
- xv. Engage the Management and Executive Committee on the proposals and undertake at least one set of consultations.
- xvi. Present a clear business case for change - develop a holistic change and transformation strategy - design and implement change initiatives throughout the lifecycle of the project
- xvii. Support the Project Team in its consultations with the Board until the proposal on the review of the organisational structure is approved.
- xx. Review our Performance management system
- xxi. Assess Communication structures
- xxii. Assess physical Infrastructure in line with proposed organisation structure
- xxiii. Incorporate comments and prepare final proposal in line with the new strategic posture of the organisation.

#### **4. DELIVERABLES**

- Project Plan
- Project Charter/SLA
- Project communications plan
- A comparison of peer organization structures in South Africa (similar in size or budget)
- Recommendations for creating efficiencies in the staffing structure, including costings and pros and cons for the different options identified.
- Business Model
- Improved/aligned/re-engineered Business Processes
- Aligned organisation structural architecture to service delivery model and strategy
- Job Profiles
- Job Grading Results
- Remuneration and reward strategy
- HR Strategy and Plan
- Competency Framework
- Skills Audit Report
- Change and Communications Strategy and Plan
- Migration and Placement Implementation Plan and Process: Actual Migration of employees into the new structure and outlined Redeployment Process and Options

#### **5. PROJECT PROPOSAL**

The service provider is required to submit a detailed and costed proposal including timeframes and milestones for the completion of the exercise. Provision should also be made for discussions and/or consultations with internal Divisions/Units, Executive Management, and the Board.

#### **6. DURATION**

This should be completed within four to six months from the commencement of this assignment.

#### **7. SKILLS AND EXPERIENCE REQUIRED**

The skills requirements are inclusive but not limited to the following:

- Business Process Improvement/ Mapping
- Proven experience in organisation design
- Ability to work within tight timeframes

MANDATORY COMPLIANCE CRITERIA	NON- MANDATORY COMPLIANCE CRITERIA
Proof of authority to sign the document must be submitted e.g. company resolution. <b>(Only if company has more than one Director/member)</b>	Valid CSD registration report with supplier number
Duly completed and signed Invitation to BID, Part A and B (SBD 1)	Bidders are encouraged to submit proof of B-BBEE status level of contributor Valid copy of a sworn affidavit. A tenderer failing to submit proof of B-BBEE status level of contribution or is a non-compliant contributor to B-BBEE will not be disqualified, The Minister of Finance has granted IDT an exemption from the provisions of the PPPFA and regulations.  The bidder will not be allocated BBBEE points in terms of section 3(c ) of the PPPFA but will be evaluated according to mandatory, functionality and pricing only.
Tax pin/ TCS certificate	
ID copies of Director/s	
CIPC, Company registration document	
Duly completed Bidder's Declaration (SBD 4 as per NT-SCM Instruction note 3 of 2021/22). All blanks' spaces must be completed. Bidders to indicate items that are not applicable.	
Proof of address (Utility Bill or Municipal Account, Contract for leasing Building or Accommodation, etc)	
No copies of the original tender document to be submitted, no correctional fluids, erasable pen or a lead pencil will be used on any of the submitted forms. Only black ink must be used to complete documents. Any mistakes must be neatly crossed out and countersigned by all relevant parties.	

## 8. EVALUATION CRITERIA

The service providers will be selected in accordance with the following criteria.

Functional evaluation criteria comprise of 100 points and bidders must score 60 % to qualify for further evaluation.

Evaluation Criteria	
<b>A. Functionality (Capacity, Bidders' Relevant Experience in Similar Work done and Methodology)</b>	<b>100</b>
A1 Capacity and team experience operating within the Organisational Design Environment:	<b>40</b>
<p>Outline years of experience and qualifications of the proposed team</p> <ul style="list-style-type: none"> <li>• Senior Organisational Development Consultant /Team Leader = <b>25 points</b> <ul style="list-style-type: none"> <li>- Qualification (Master's Degree) = 10</li> <li>- Experience (10 years of Relevant experience) = 15</li> </ul> </li> <li>• Additional team member with similar Qualification and experience = <b>15 points</b> <ul style="list-style-type: none"> <li>- Qualification = 5</li> <li>- Experience = 10</li> </ul> </li> </ul> <p><b>Requirements:</b> Expertise, skills and experience in offering Organizational Design, Strategy, Change Management, Service delivery model, Reorganization, remodelling and reporting</p> <p><b>Relevant Qualifications</b> Master's Degree in Organisational Development or the Social Sciences.</p>	
A2 Similar Work Experience Reference	<b>25</b>
<p>The bidder must provide details of similar work completed in relation to Organisational Design environment</p> <p>(a) 1 to 3 letter/s of similar work done = <b>10 points</b>  (b) 4 to 10 = <b>15 points</b>  (c) 11 and above = <b>25 points</b></p> <p><b>Requirements:</b> Bidders are expected to attach at least a minimum of 5 copies of reference letters and appointment letters from reputable service providers that they rendered the service in the past five years. The following details must be reflected in the content of the reference letter/s:-</p> <ul style="list-style-type: none"> <li>• Name and short description of project successfully completed/involved in</li> <li>• Role and Responsibilities,</li> <li>• Duration of involvement (in months),</li> <li>• Value of the contract, and</li> <li>• Contactable References. (Letter of references in letterhead of the clients signed by the authorized person)</li> </ul>	
A3 Approach and Methodology	



## **11. ENQUIRIES**

All Supply Chain and Technical enquiries must be sent for the attention of:

Ms. Linda Stoffel or Mr Sam Makhura on the email below.

[Orgquesries@idt.org.za](mailto:Orgquesries@idt.org.za)

## **12. SUBMISSION OF PROPOSALS**

Submissions of proposals and quotations must be submitted in a sealed enveloped clearly marked “Appointment of Consultant to review the organisational structure of the IDT.” and delivered to the address below by 12H00 on Friday 5 May 2022.

### **Note:**

- A compulsory virtual/ physical briefing session will be conducted on:  
  
20 April 2022 at 10H00;
- Address: (Block B, Glen Wood Office Park, Sprite Ave, Faerie Glen, Pretoria, 0043);
- Link will be sent to all those who send their intention to attend using the below email address.  
[Orgquesries@idt.org.za](mailto:Orgquesries@idt.org.za)

**The Tender Box is at the reception at the following address:**

**Block B, Glen Wood Office Park, Sprite Ave, Faerie Glen, Pretoria, 0043**