



SOUTH AFRICAN LOCAL
GOVERNMENT ASSOCIATION

SALGA

Inspiring service delivery

**REQUEST FOR PROPOSALS:
APPOINTMENT OF A SERVICE PROVIDER TO RENDER
SERVICES ON BEHALF OF SALGA FOR THE
DEVELOPMENT & PACKAGING OF SALGA
2021/22 ANNUAL REPORT**

BID NO. SALGA

Closing date and time:

Bid Validity Period:

TENDER BOX ADDRESS:

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Waterkloof Glen

TEL: (012) 369 8000

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1. INTRODUCTION

The South African Local Government Association (SALGA) is a public entity established by the Organised Local Government Act (Act 52 of 1997) to assist in the comprehensive transformation of local government in South Africa. SALGA is managed within the framework of the Public Finance Management Act (Act 1 of 1999) and is listed as a schedule 3A public entity. Its main objectives are to:

- Represent, promote and protect the interests of local government;
- Transform local government to enable it to fulfil its developmental role;
- Enhance the role and status of its members as provincial representatives and consultative bodies of local government;
- Enhance the role and status of municipalities;
- Be recognised by national and provincial governments to be the representative and consultative body in respect of all matters concerning local government and to make representations to both provincial and national governments in respect of any matter concerning local government;
- Ensure the full participation of women in organised local government;
- Be the National Employers' Association representing all municipal members and, by agreement, associate members.

2. SALGA MANDATE

Developmental Local Government is an essential component of the machinery of government. In accordance with its constitutional mandate, SALGA is obliged to transform the local government sector to one that has the required capacity to make a meaningful contribution to poverty alleviation, economic development and all socio-economic opportunities that the state has geared itself to provide for its people. SALGA also serves as the representative voice of all 257 municipalities in the country. For the past 20 years, since its establishment, SALGA has endeavoured to bring focus to its mandate of supporting local government transformation in a complex environment, characterised by a highly diverse and diffuse membership-base of municipalities. In terms of its amended Constitution, SALGA is a unitary body that consists of a national association and nine provincial offices. Its mandate rests on six primary pillars:

- (1) **Representation, Advocacy and Lobbying** refers to representing the interests of members in legislatures and other policy making and oversight structures. It also refers to engaging with various stakeholders, public debates etc. in the interest of Local Government.
- (2) **Employer Body** refers to being an effective employer representative for members. Employer representation is carried out through collective bargaining (in terms of the Labour Relations Act) in various structures including but not limited to those established in the South African Local Government Bargaining Council.
- (3) **Capacity Building** refers to facilitating capacity building initiatives through among others; representing member interests in the Local Government Sector Education Authority (LGSETA). SALGA strives to facilitate a coherent, well-co-ordinated capacity building programme for municipal councillors and officials.

- (4) **Support and Advice** refers to the provision of tools and services that enable municipalities to understand and interpret trends, policies and legislation affecting Local Government and to implement the said policies and plans
- (5) **Strategic Profiling** of Local Government refers to enhancing the profile and image of local government as an important and credible agent for the delivery of services. Profiling focuses within South Africa, the African continent and the rest of the world.
- (6) **Knowledge and Information Sharing** refers to building and sharing a comprehensive hub of Local Government knowledge and intelligence that will enable informed delivery of other SALGA mandates. The knowledge hub is also a useful reference point for all who seek Local Government information.

3. PURPOSE OF THIS REQUEST

The purpose of this document is to call for proposals from suitable service providers to assist the South African Local Government Association (SALGA) with the development, and package the Integrated Annual Report for the year ending 31 March 2021.

4. BACKGROUND AND CONTEXT

An annual report is a comprehensive report on a company's performance throughout the preceding year. Annual report is intended to give relevant stakeholders information about organisation performance and financial performance.

The SALGA Annual report 2021/22 is based on the approved Annual Performance Plan (APP) 2021/22. This 2021/22 APP is the fifty plan of the Strategic Plan 2017-2022. The five-year strategic plan aims to strengthen SALGA role as a protector to defend local democracy and to enforce the rights of the local government sector as well as to constructively disrupt where the existing overall system compromises the ability of local government to deliver on its mandate. The 2021/22 APP is a formal statement of set of key performance indicators to the five-year strategy.

The 2021/22 APP is focused on four outcomes, sixty-two (62) associated outputs/targets.

5. SCOPE OF WORK

SALGA intends to appoint a suitable service provider to assist with the following services:

a) Content Development

- Produce +/-300 pages (4 pages being the covers) SALGA Annual Report inclusive of Annual Financial Statements.
- Produce +/- 80 pages summarised version of the Annual Report
- Using background documents and reports provided by the Operations Cluster, the service provide should be able to develop/write relevant and exciting content for the Annual report and its summary version.
- Ensure that the booklets are pictorial and easy to read

- Proof-read and edit of all the content in the booklet
- Submit draft booklet as per SALGA's inputs
- Submit revised draft to SALGA for sign-off
- Submit abridge version of annual report

b) Design and Layout

- The service provider should be able to design and layout the SALGA Annual Report and the summarised version
- Design and development must fully comply with SALGA's Corporate Style, Guide and Identify.

c) Photography

- SALGA will provide photographs to be included in the publication, however.
- The service provider is also required to quote for 40 pictures in line with the theme of the annual report.

d) Final deliverable (Full Annual Report)

- Provide X 1 high gloss/matt proof to SALGA for sign off
- Provide X 1 online version of the booklet to SALGA
- Provide X 1 print-ready version of the booklet to SALGA

e) Final deliverable (Summarised Annual Report)

- Provide X 1 high gloss/matt proof to SALGA for sign off
- Provide X 1 online version of the booklet to SALGA
- Provide X 1 print-ready version of the booklet to SALGA

5.1 KEY DELIVERABLES

- a) 3 x proof read printed document (in different stages until final report)
- b) A detailed SALGA Annual Report booklet following the National Treasury guidelines.
- c) A summarised version of the SALGA Annual Report
- d) PowerPoint Presentation on Annual Report

5.2. PREFERRED SERVICE PROVIDER COMPETENCIES

SALGA wishes to engage the successful bidder who demonstrated appropriate skills/expertise in the following areas:

5.3. CONTENT OF PROPOSAL

The proposal should include

- 5.3.1. All relevant perceived strengths and weaknesses of the firm bidding for the service, e.g. similar previous experience, in-house skills, etc; providing information which will assist SALGA to assess its capabilities, competitive advantages, etc.;

- 5.3.2. The summary of the bidder's mission statement, the vision statement, values and long-term strategies and objectives as comprehensively as possible;
- 5.3.3. A list of references of previous and current appointments relevant to the required services; examples of such services capabilities and experience and more specifically the number and size of organisations where service rendered in specific sectors in government and areas of expertise.
- 5.3.4. An organogram or list of partners, managers, specialists, together with the *curriculum vitae* of the staff who will be available for the duration of the work; any staff changes regarding staff allocated to SALGA must be done in consultation with the Project Manager representing the organisation. The successful bidder should provide experienced specialists relevant to the required services.
- 5.3.5. A breakdown of the tariff, VAT inclusive, per category as required for services rendered. Expenditure incurred without the prior approval of SALGA will not be reimbursed. An analysis of costs must be given to cover the full amount, and where possible, costs should be linked with specific tasks to be undertaken. All other incidental costs should be included in the budget breakdown.
- 5.3.6. In so far as is possible, a comprehensive budget, showing the service of activities proposed, with charge-out rates and budgeted hours per activity, detailing all assumptions made in arriving at a proposed budget, including all cost factors such a traveling.
- 5.3.7. The rate of remuneration of consultants will be subject to negotiation, not exceeding the applicable rates as contained in the DPSA Guide on Hourly Fee Rates for Consultants.
- 5.3.8. The remuneration framework of consultants shall take the following into consideration:
 - a) The "Guidelines on Fees for Audits done on behalf of the Auditor-General of South Africa (AGSA)" as issued by the South African Institute of Chartered Accountants (SAICA).
 - b) The "Guide on Hourly Fee Rates for Consultants "as issued by the department of Public Service and Administration (DPSA); and/or
 - c) Remuneration guidelines issued by professional service organisation or regulatory bodies, as may be relevant.
- 5.3.9. How the bidder proposes to provide governance assistance to SALGA; and
- 5.3.10. In so far as is possible, provide an overview of the methodology to be applied.
- 5.3.11. How the bidder will ensure that there is transfer of skills to the SALGA team.

5.4 APPOINTMENT, COMMENCEMENT AND DURATION

The appointed service provider is anticipated to commence the work upon appointment for a duration of 4 – 5 months and ensure completion of the work within that timeframe. The following deadlines should be noted:

Description	Service Provider Due date	SALGA compliance submission date
1 st Draft Report for submission to AG for audit	09 May 2022	15 May 2022
1 st Proof Engagement	To be determined	
2 nd Draft Report for submission to AG for approval	10 June 2022	30 June 2022
2 nd Proof Engagement	To be determined	
3 rd Proof Engagement	To be determined	
Final Annual Report for submission to COGTA and National Treasury	15 July 2022	31 July 2022

5.5. DESCRIPTION AND EXTENT OF WORK (PROJECT MANAGEMENT)

5.5.1. Performing of assignments

Assignments are to be performed in accordance with the industry/profession standards as well as the terms of reference. All reports will be reviewed by the relevant Project Manager representing the organisation. All working papers and reports and documents will become the property of SALGA.

The successful bidder shall work with the Operations cluster of SALGA on the planning of various phases of the service activities, and must be prepared to regularly report the progress to the relevant Project Manager.

5.5.2 Timing of assignments

The performance of this assignment shall be in accordance with the approved plan by the Project Committee. The final responsibility of approving the scope and extent of the work resides with the relevant Project Manager.

5.5.3 Quality assurance reviews of the work

The service provider shall ensure that all work conforms to all standards set out by SALGA.

5.5.4 Monitoring progress of assignments

On a mutually agreed basis, the service provider shall meet with the Project Manager to report progress of the work, and at the Project Committee meetings.

5.5.5 Payments

SALGA undertakes to pay out within a reasonable time period all valid claims for work done to its satisfaction upon presentation of a substantiated claim. No payment will be made on outstanding information not submitted by the service provider. The parties shall, upon appointment of the service provider, sign a service level agreement to govern their business relationship. Acceptance of any bid does not mean that work on an uninterrupted basis is guaranteed for the duration of the contract.

5.5.6 Expenditure incurred by the bidder

SALGA will not be held responsible for any costs incurred by the bidder in the preparation and submission of this bid.

6. INSTRUCTION TO BIDDERS

6.1 General Instructions

This document constitutes a Request for Proposal (RFP), which specifies SALGA's requirements for a service provider to perform the Development & Packaging of SALGA's 2021/22 Annual Report. The information contained herein provides a format to facilitate bidder's responses to this RFP. It is important that the format be followed closely to help maintain the decision making timetable. Responses must be presented in the same order as the requirements appear, section by section, and numbered accordingly, with acknowledgement of all clauses. All pricing information should be fully disclosed with all charges clearly defined, i.e. a per unit fee based on activity. Please feel free to address any other potential services not specifically mentioned in this RFP that may be of benefit to the National Executive Committee (NEC) of SALGA which is the organisation's accounting authority.

6.2 Objectives

SALGA's objective in the call for proposals is to select a service provider suitable for the development and packaging of South African Local Government Association 2021/22 Annual Report.

6.3 Terms of Contract

The term of the contract shall be regulated by the Service Level Agreement (SLA) to be concluded with the winning bidder. It is anticipated that the term of the contract shall be for the duration of the assignment and shall expire upon fulfilment of the scope of work. The contract may be extended by mutual agreement. Thirty (30) days written notice must be given if either party wishes to terminate the agreement prior to the contract's expiry date.

6.4 Questions during Proposal Process

Any enquiries regarding this RFP should be directed to Precious Nzuza, SCM at Pnzuz@salga.org.za, located at the SALGA National Office – 012 369 8000. Questions will only be taken up to four days prior the closing date.

Bidders finding apparent discrepancies or omissions in the RFP should notify SCM at Pnzuz@salga.org.za at once. Bidders may during the bidding period, be advised by Addenda, of any additions, clarifications, deletions or alterations to these specifications. All such changes should be covered by the bidder's proposal. Information used in the preparation of a proposal from other than this RFP and any written addenda (considered as the proposal documents) will not be considered as valid or official.

No further addenda will be issued by SALGA after 11:00am, four business days prior to RFP closing without providing an extension of time.

6.4 Contract Award

SALGA reserves the right to accept any proposal submitted or reject all proposals.

Any proposal submitted, that is not in complete compliance with the requirements of the proposal documents may be accepted or disqualified, at the option of SALGA.

Please outline in your proposal the assistance your institution is prepared to provide in order to meet the estimated contract duration period for the full implementation of the scope of work.

6.5 Termination of Contract

SALGA reserves the right to terminate the agreement with 30 days written notice to the winning bidder subject to the following:

- 6.5.1** the winning bidder fails to perform in accordance with the specified service requirements as set out in the RFP;
- 6.5.2** the winning bidder otherwise violates the provisions of the RFP to a substantial degree.

6.6 Liability

SALGA will not be held liable for any actions of the winning bidder and/or its employees.

6.7 Important Dates

Please note that some of the dates are based on estimated project timeframes.

7. CONDITIONS OF BID (FAILURE TO MEET ANY OF THE REQUIREMENTS BELOW MAY RENDER YOUR BID PROPOSAL NON-RESPONSIVE)

- 7.1 The requirement for content of the project proposal section below outlines the information that must be included in bid offers. **Failure to provide all or part of the information may result in your bid being excluded from the evaluation process.**
- 7.2. A contract will be signed with the appointed Service Provider.
- 7.3. **The** Service Provider will be required to sign confidentiality and indemnity agreements with SALGA.
- 7.4. SALGA may at its own discretion vary an instruction to include more work.
- 7.5. Failure to comply with any condition of this request for a proposal will invalidate respective tender proposal
- 7.6. In the event that any conflict of interest is discovered during the assignment, SALGA reserves the right to summarily cancel the agreement and demand that all the information, documents and property of SALGA be returned forthwith.
- 7.7. SALGA reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its project proposal.
- 7.8. Bidders shall not make available or disclose details pertaining to their project proposal with anyone not specifically involved, unless authorized to do so by SALGA.
- 7.9. Bidders shall not issue any press release, social media or other public announcement pertaining to the details of their project without the prior written approval of SALGA.
- 7.10. Bidders are required to declare any conflict of interest they may have in the transaction for which the bid is submitted or any potential conflict of interest. SALGA reserves the right not to consider further any bid where such a conflict of interest exists or where such potential conflict of interest may arise.
- 7.11. The bid offers and proposals should be valid and open for acceptance by SALGA for a period of 120 days from the date of submission.
- 7.12. Bidders are advised that submission of a project proposal gives rise to no contractual obligations on the part of SALGA.
- 7.12. Disputes that may arise between SALGA and a bidder must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- 7.13 In addition to adherence to the specific terms and conditions of proposals, provided in this document, the bidder shall be bound by the provisions of the General Conditions of Contract attached hereto, an originally signed copy of which must be submitted together with all other bid documentation.

7.14. All returnable bid documents must be completed in full and submitted together with the bidder's proposal.

7.15 SALGA will not be liable for costs incurred during the site visits or any other cost related to the submission of the bid.

7.16 Completion of the Standard Bidding Documents stated herein below is **mandatory**, failure to do so **may** render your bid offer invalid.

7.17. Standard Bidding Forms

7.17.1 Preference Points Claim form

Form SBD 6.1 - Bidders must complete this document in full, special attention must be given to section 8 and 9. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink.

7.17.2 Declaration of Interest

Form SBD 4 - Bidders must complete this document in full. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink.

7.17.3. Declaration of past Supply Chain Management Practice

Form SBD 8 - Bidders must complete this document in full. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink.

7.17.4. Certificate of Independent Bid Determination

Form SBD 9 - Bidders must complete this document in full. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink.

8. EVALUATION

The following evaluation method will be used:

- After the closing date of the bid invitation, an appointed evaluation committee of SALGA officials and possibly other external parties will evaluate the proposals of the bidders.
- The committee will individually evaluate each of the bid proposals received against the appointed criteria as provided for in Preferential Procurement Regulations, 2017

All proposals submitted will be evaluated on three categories:

- Functionality (technical content)
- Price
- B-BBEE status level of contribution

Bids will be evaluated in accordance with the Preferential Procurement Regulations, 2017, using the 80/20 split. The 80/20 preference points system applies for acquisition of goods or services for Rand value equal or above R30 000 and up to R50 million.

Firstly, the assessment of functionality will be done in terms of the evaluation criteria and the minimum threshold value of 65 points. A bid will be disqualified if it fails to meet the minimum threshold value for functionality as per the bid invitation.

A Bid Evaluation Committee will review and evaluate the proposals. A maximum of four (4) bidders may be invited to present their proposal for the purpose of providing clarification and answers to questions by the committee. If presentations are necessary, they will be made on the date, time and location to be confirmed.

Thereafter, only the qualifying bids after the presentation will be evaluated in terms of the 80/20 preference points systems, 80 points will be used for price only and the 20 points will be used for B-BBEE Status Level of Contribution. The price points will be calculated in accordance with the formula prescribed in Regulation 6. (1) of the Preferential Procurement Regulations, 2017.

A recommendation for the awarding of the contract will be made at the meeting of the Bid Adjudication Committee to be confirmed, where applicable.

For functionality, the following criteria will be applicable and the maximum value of points breakdown for each criterion using these scale level descriptors:

SCALE LEVEL DESCRIPTIONS	RATING
No relevant response or information given to enable evaluation	0
Very poor response based on expected standard	1
Poor response based on expected standard	2
Average response based on expected standard	3
Good response based on expected standard	4
Excellent response based on expected standard	5

Points Breakdown:

CRITERIA FOR FUNCTIONALITY	WEIGHT
Approach and Methodology (submit Project Plan)	30
Service provider must show experience in developing Annual Report Publications (Provide in your proposal a section that talks about the previous experiences related to the development of annual report)	30
Provide at least 3 reference letter from companies where the service has been rendered. (each letter should be accompanied by a sample annual report)	20

CRITERIA FOR FUNCTIONALITY	WEIGHT
Provider the CV or profile of the writer (the person that will be entrusted with the writing of the whole Annual Report as well as the summarized version)	20
Total for functionality	100
Threshold	75

Bidders who score 75 (average) points and above will be considered in phase 2 of the evaluation. The 80/20 points system will be used when evaluating this Request for Proposal.

The remaining 20 points will be allocated in terms of Regulation 6(2) and 6(3) of the Preferential Procurement Regulations, 2017, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Phase 2 of evaluation will include the sum of the two criterions below:

CRITERIA	WEIGHT
Price	80
B-BBEE status level of contribution	20
TOTAL	100

Bidders must submit proof of their B-BBEE status level of contributor. A bidder failing to submit proof of B-BBEE status level of contribution or is a non-compliant contributor to B-BBEE may not be disqualified but may only score point out of 80 for price, and score 0 points out of 20 for B-BBEE.

9. GENERAL CONDITIONS

The following should be noted by interested parties:

- Intellectual property and ownership of all materials and products developed in the execution of the contract will be vested in SALGA.

- Materials and products may not be made available to any unauthorized person or institution or sold for profit without prior written consent from SALGA.
- On completion or termination of the agreement, all materials and products must be handed over to SALGA.
- No information concerning the tender or award of the tender may be made available by the bidder to other parties without prior consultation and written approval from SALGA.
- SALGA may at its own discretion vary this instruction to include more scope / work or to exclude work/service areas. In the case of the latter, the bidder shall not be entitled to claim for any work not required and may engage SALGA on the pricing of the additional work/ service proposed.
- All copyright and intellectual property rights that may result as a consequence of the work to be performed shall reside with SALGA and the service provider shall be required to sign an agreement of confidentiality.
- SALGA may dictate the framework in which documents (policies, plans, report etc.) shall be submitted; however the service provider should be able to submit a proposal on the lay-out of his/her choice for consideration by SALGA.
- SALGAs (general conditions of bid, contract and order) shall be applicable to this bid.
- The service provider shall be required to conclude and sign a Service Level Agreement (SLA) after the appointment.
- SALGA reserves the right not to award the bid to any bidder at its own discretion.