

TERMS OF REFERENCE



THE PRESIDENCY REPUBLIC OF SOUTH AFRICA SUPPLY CHAIN MANAGEMENT

SCMP 13/05/02R(i): APPOINTMENT OF A SERVICE PROVIDER FOR THE FACILITATION AND DEVELOPMENT OF THE PRESIDENCY ANNUAL PERFORMANCE PLAN (APP) 2026/27

1. THE PURPOSE OF TERMS OF REFERENCE

- 1.1 The purpose of this terms of reference is to invite bidders to submit bid responses/proposals for the facilitation and development of The Presidency Annual Performance Plan 2026/27.

2. BACKGROUND

- 2.1 A major focus of planning at the departmental level is the preparation of the Annual Performance Plans. The requirement for departments to undertake strategic planning is set out in the Public Service Regulations as well as Treasury Regulations. The regulations require departments to produce a five-year strategic plan, ideally from the first planning cycle following an election, linked to the identified outcomes of the institution.

The Annual Performance Plan must be produced, setting out performance indicators and targets for budget programmes, and sub-programmes where relevant, to facilitate the institutions realising its outcomes set out in the Strategic Plan and National Annual Strategic Plan.

The Presidency does not have enough capacity, therefore seeks to appoint a service provider to facilitate the planning process and development of the Annual Performance Plan 2026/27.

3. SCOPE OF WORK

Timelines for Development of the Annual Performance Plan 2026/27

Action	Frequency / Timeframe
Development of the Project Plan and Concept Note for submission to the COO	2 nd week of August
Conduct Branch Planning Session for inputs on the APP for the next financial year	1st Week of September
Conduct 1st Strategic Planning and Review Session	2nd Week of September
Present the Draft APP to Branch Heads	4th Week of September
Submission of the APP to the COO for approval	2nd Week of October
Submission of the Draft APP to DPME and NT	4th Week of October
Develop draft overviews and forewords for the Minister and DG	2nd Week of January
Conduct 2nd Strategic Planning and Review Session	3rd Week of January
Submit the APP to DPME	1 st Week of February
Submit final draft APP to AG	2nd Week of February
Submit final draft APP to the COO for approval.	4th Week of February
Present final draft APP to Branch Heads	4th Week of February
Present the final draft to the DG and Minister	1 st week of March

Timelines for Development of the Branch Operational Plans 2026/27

Action	Frequency / Timeframe
Commence with the Operational Planning Sessions and development of Branch Operational Plans	1st Week of March
Circulate draft Branch Operational Plans to Branches to review and confirm the plans	3rd Week of March
Submission of the Branch Operational Plans to the COO for approval	4th Week of March

Timelines for Development of the Unit Operational Plans 2026/27

Action	Frequency / Timeframe
Commence with the Operational Planning Sessions and development of Unit Operational Plans	1st Week of April
Circulate draft Unit Operational Plans to Units to review and confirm the plans	3rd Week of April
Submission of the Unit Operational Plans to the respective DDG for approval	4th Week of April

PHASE 1

- 3.1 Strategic Planning Unit and the appointed service provider shall have an inception meeting to discuss the project and timeframes before starting the project.
- 3.2 Preparatory workshop between the Strategy Unit and the service provider on the development of the Concept note for the Strategic Planning and Review Session for approval by the COO before the session
- 3.3 The service provider will be required to:
 - 3.3.1 Facilitate the Branch Operational Planning session, provide an agenda and templates and presentations/working documents for all sessions as well as solicit inputs after the session.
 - 3.3.2 Facilitate the first Strategic Planning and Review Session for Senior Management Services (attendance of workshop and actual facilitation) in August 2025.
 - 3.3.3 Develop the Report from the Strategic Planning and Review Sessions.
 - 3.3.4 During the Planning Session, the service provider will record the content of the meeting to develop the draft APP as well as developing the presentation to be tabled at the Branch Heads Forum

PHASE 2

- 3.4 The service provider will:
 - 3.4.1 Gather inputs from Branch Heads Forum, which will then be incorporated on the draft Annual Performance Plan based on workshop conversations for submission to National Treasury (NT) and Department of Planning, Monitoring and Evaluation (DPME) on the last day of October for each year.
 - 3.4.2 Assist to address the recommendations from National Treasury and DPME on the Draft Annual Performance Plan 2026/27.
 - 3.4.3 Use the planning tools for situational analysis to prepare a draft Situational Analysis report, which must provide an analysis of the external and internal environment in which The Presidency operates. This must give a critical review of The Presidency in relation to its performance and organisational environment, and support the framing of critical issues, which influence the content of the organisation's future plans. The situational analysis report will be
 - I. an input report on assessment of the examination of trends,
 - II. the effectiveness of existing programmes,
 - III. key strategic issues facing The Presidency,
 - IV. key dynamics in the environment likely to impact the work of The Presidency,
 - V. stakeholder's expectations for key programmes, and

- VI. organisation's strengths and weaknesses.
- 3.4.4 Facilitate the second Strategic Planning and Review Session for Senior Management Services (attendance of workshop and actual facilitation) after the State of the Nation's Address (SONA) and January Lekgotla.
- 3.4.5 Develop a Report from the Strategic Planning and Review Sessions and development and finalisation of the Annual Performance Plans.

PHASE 3

- 3.5 The Service Provider will have to re-worked the plan based on the pre-audit by the Auditor General (AG) to determine whether they meet the set legislative standard. These also include all the re-iterations required by the Executive Management, Internal Audit, DPME and NT to prepare the Plan to the required quality standard, prior to printing and tabling the plans.
- 3.6 The service provider must assist with conducting Branch and Unit Operational Planning Workshops after the finalisation of the Annual Performance Plan. The service provider will have to develop aligned Branch and Unit Operational Plans for all branches and Units in The Presidency for 2026/27 financial year. The service provider must co- facilitate and produce the write up of all Branch and Unit Plans for 2026/27 financial year.

4. REQUIREMENT FOR THE PROJECT

- 4.1 Project Leader's must have a Bachelor's degree in Social or Public Management or Public Administration (NQF level 7).
- 4.2 The team members must also have a Bachelor's degree in Social or Public Management or Public Administration (NQF level 7).
- 4.3 Project Leader must demonstrate a minimum of 3 years experience in any of the following sectors (must attach CV);
- National or Provincial departments
 - Government components listed respectively in Schedule 1, 2 and 3 of the Public Service Act (1994), as amended by Act 30 of 2007; constitutional institutions listed in Schedule 1 and public entities listed in Parts A and C of Schedule 3 of the PFMA Act No 1 of 1999.
- 4.4 Team member must demonstrate a minimum of 3 years' experience in any of the following sectors (must attach CV);
- National or Provincial departments
 - Government components listed respectively in Schedule 1, 2 and 3 of the Public Service Act (1994), as amended by Act 30 of 2007; constitutional institutions listed in Schedule 1 and public entities listed in Parts A and C of Schedule 3 of the PFMA Act No 1 of 1999.

4.5 Company must demonstrate a minimum of 2 years' experience in facilitating and developing the APP. Company must attach The Presidency returnable project reference form that is signed and with contact person and contact number.

4.5 **Methodology:** The bidder must submit a proposal demonstrating the capability to develop and implement a **project plan** for facilitation and development of the APP, Branch and Unit Operational Plans

5. SPECIAL CONDITIONS OF PROJECT/CONTRACT

- The successful bidder will be required to sign a standard contract with The Presidency that will outline the terms and conditions of the contract.
- The service provider will commence with the services upon signing of the service level agreement by all parties involved.
- In the event of changes in the project, the service must provide the detailed CVs, proof of qualification for the new project team members. The new project team members will be subjected to the security clearance process prior to confirmation of involvement in the project.
- The Presidency undertakes to pay out in full within thirty days (30) after, all valid claims for services rendered to its satisfaction upon presentation of a substantiated claim/invoice, according to the payment schedule agreed upon in the contract.
- Bidder/s are requested to provide clarity on concept document / methodology to approach the project and a detailed project plan

6. SECURITY REQUIREMENTS

6.1 The appointed service provider including their staff assigned to the project will be subjected to a security screening exercise by The Presidency. In the event that the outcome of the security screening exercise is negative, the successful bidder(s) will be disqualified.

7. DURATION OF CONTRACT

7.1 The duration of the project is eight (8) months and specific milestones must be reached within this period.

8. MONITORING AND EVALUATION OF THE PROJECT

8.1 All work is to be carried out in accordance with the time schedule as agreed with the Project Manager and within the agreed deliverable and terms and conditions of the signed contract.

8.2 Monitoring and evaluation of performance and adherence to the project requirement will be done by the Project Manager/owner.

9. LEGISLATIONS APPLICABLE TO THE BID

Bids will be subject to the Supply Chain Management (SCM) conditions as follows:

9.1 The Preferential Procurement Policy Framework Act, Act No. 05 of 2000

- 9.2 Preferential Procurement Regulations, 2022.
- 9.3 The Public Finance Management Act, Act 1 of 1999.
- 9.4 The Presidency Supply Chain Management Policy

10. SPECIAL CONDITIONS AND REQUIREMENTS OF THE BID

- a) Only bidders who score at least 62 points and above for the functionality information will be evaluated further on price and specific goals.
- b) Pricing schedule must be attached.
- c) Contract commencing on date of appointment until finalisation of the Annual Performance Plan for 2026/27 and related plans for the financial year.
- d) The contract may be terminated by The Presidency during its period after thirty (30) days written notice, if the contractor is negligent or does not perform in accordance with the contractual stipulations, Proposal documents, proposals received and service level agreement to be entered into.
- e) Payment will be made within 30 days after receipt of a valid invoice.
- f) Payment upon completion of each Phase of the project and upon submission of a draft report attached to each Phase to the satisfaction and quality criteria of the Presidency.
- g) Final payment will be processed upon completion of the project to the satisfaction as per the criteria and quality for the Presidency.
- h) Ensure that the human resources deployed to this project have the necessary knowledge in government planning, skills, experience in development of the Annual Performance Plan and capacity to successfully undertake the abovementioned deliverables.
- i) The duration of the project is eight (8) months and specific milestones must be reached within this period.
- j) The successful service provider will have to enter into a service level agreement (SLA) or special conditions of contract with The Presidency.
- k) The Presidency reserves the right not to award this contract.
- l) The service provider (Directors, members of close corporation and employees) involved with the contract or having access to information relating to the contract must be prepared to go through the required process of security clearance and background checks prior to appointment.

11. EVALUATION PROCESS

A three (3) phase approach will be followed during the evaluation phase. All proposals received will be evaluated in accordance with the **80/20-point** system as prescribed in the Preferential Procurement Regulation, 2022.

11.1 PHASE 1: DISQUALIFICATION ADMINISTRATION REQUIREMENTS

- ☐ Only bidders who submitted quote according to the below will be considered for phase 2
 - **Quotation validity period must be 90 days if Not possible indicate the period on the quotation. Quote that depends or affect by Rate of Exchange will be processed using the current Rate of Exchange on the award**
 - Quotes must be submitted as per the prescribed closing dates.
 - Supplier must be registered on CSD (Central Supplier Database)
 - Bid/quotations submitted after closing date will not be considered

11.2 PHASE 2: FUNCTIONAL/TECHNICAL EVALUATION

Only proposals that have met the criteria for administrative requirements will qualify for this phase. During the second phase, the ability of the bidder to execute the project will be evaluated in one stage.

Desk-top Evaluation

- Experience and References
- Qualifications
- Methodology of the Project Plan

Each criteria will be allocated points with a total of 100 points. Only proposals that scored at least 62 points or more will proceed to phase 3.

EVALUATION CRITERIA

CRITERIA	SUB-CRITERIA	WEIGHT
Expertise & Capabilities	Qualifications of the project leader (Attach Valid Certified copies of certificates) • No qualification information = 0 Point • Bachelor's degree in Social or Public Management or Public Administration (NQF level 7) = 10 points.	10
	Qualifications of the team member assigned to the project (Attach Valid Certified copies of certificates) • No qualification information = 0 Point • Bachelor's degree in Social or Public Management or Public Administration (NQF level 7) = 5 points	5
	Leader experience in strategic planning in any of the following sectors: • National and Provincial departments • Government components listed respectively in Schedule 1, 2 and 3 of the Public Service Act (1994), as amended by Act 30 of 2007; constitutional institutions listed in Schedule 1 and public entities listed in Parts A and C of Schedule 3 of the PFMA Act No 1 of 1999. • 0-2 years' experience = 0 point • 3-5 years' experience = 25 points • 6-7 years' experience = 30 points • 8 and more years' experience = 40 points	40
	Team member experience in strategic planning in any of the	20

CRITERIA	SUB-CRITERIA	WEIGHT
	following sectors: - National and Provincial departments - Government components listed respectively in Schedule 1, 2 and 3 of the Public Service Act (1994), as amended by Act 30 of 2007; constitutional institutions listed in Schedule 1 and public entities listed in Parts A and C of Schedule 3 of the PFMA Act No 1 of 1999. 0-2 years' experience = 0 point 3-5 years' experience = 10 points 6-7 years' experience = 15 points 8 and more years' experience = 20 points	
	Company Experience The company to demonstrate experience where they were appointed to facilitate and develop the APP: Attach The Presidency returnable project reference form (Annexure A), signed, dated with contact person and contact number. 0-1 years' experience = 0 point 2-5 years' experience = 5 points 6-7 years' experience = 10 points 8 and more years' experience=15 points	15
Strategic Approach & Methodology	The service provider must be able to develop and implement a project plan for facilitation and development of the APP, Branch and Unit Operational Plans. The project plan must outline clear steps on how these Plans will be developed; - No project plan developed or project plan not in line with the revised framework for Strategic Plan and APP = 0 points - Project plan shows understanding of the revised Framework for Strategic Plan and APP = 7 points - Project plan shows understanding of the revised Framework for Strategic Plan and APP with clear steps demonstrating how APP will be developed to implement the Strategy of The Presidency = 10 points	10
TOTAL		100

11.3 PHASE 3 – PRICE AND SPECIFIC GOALS

The bid will be awarded to the bidder who scored the highest points in terms of Price and specific goals

DESCRIPTION	POINTS
PRICE	80
SPECIFIC GOALS	20
TOTAL PONTs FOR PRICE AND SPECIFIC GOALS	100

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(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	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Means of verification
Women ownership		10	CSD report
Youth ownership		7	CSD report
People with Disabilities		3	CSD report

NB: Formula for calculating number of points: Ownership percentage X number of points allocated /100

12. ENQUIRIES

For technical enquiries

Contact person:

- Ms Joy Masemola JoyT@presidency.gov.za



**THE PRESIDENCY
REPUBLIC OF SOUTH AFRICA**

RETURNABLE PROJECT REFERENCE FORM

Project Description:	DESCRIPTION: APPOINTMENT OF A SERVICE PROVIDER FOR THE FACILITATION AND DEVELOPMENT OF THE PRESIDENCY ANNUAL PERFORMANCE PLAN (APP) 2026/27
Ref No:	SCMP 13/05/02R(i)

Note: This returnable document must be completed by the referee to whom services of similar nature, scope, complexity and value was completed successfully by the bidder.

I (Name, Surname & Designation
Preferably contract Manager)

From

.....
(Company Name)

Declare that the company was the recipient (client) of the following professional services (project)
successfully executed by

.....
(Name of bidder)

Project Description:

.....
.....

Project Location:

.....
.....

Commencement Date (DD/MM/YYYY) :.....Completion
Date(DD/MM/YYYY):.....

Contract Value:

.....
.....

.....
Signature (Company Head or Delegated officer)

.....
Name of Signatory

Contact Numbers:.....

.....
Date



**THE PRESIDENCY
REPUBLIC OF SOUTH AFRICA**

Pricing schedule

SCMP 13/05/02R(i) : APPOINTMENT OF A SERVICE PROVIDER FOR THE FACILITATION AND DEVELOPMENT OF THE PRESIDENCY ANNUAL PERFORMANCE PLAN (APP) 2026/27

Services description	Price(exclusive of VAT)	Price(<i>inclusive of VAT</i>)
Phase 1 1. Convene an inception meeting to discuss the project and timeframes before starting the project. 2. Preparatory workshop between the Strategy Unit and the service provider on the development of the Concept note for the Strategic Planning and Review Session for approval by the COO before the session. 3. The service provider will be required to: 3.1 Facilitate the Branch Operational Planning session, provide an agenda and templates and presentations/working documents for all sessions as well as solicit inputs after the session. 3.2 Facilitate the first Strategic Planning and Review Session for Senior Management Service in August each year. 3.3 Develop a report from the Strategic Planning and Review Sessions as well as the development of the Annual Performance Plans. 3.4 Record notes of the meetings to develop the APP, as well as develop the presentation of the draft APP to be tabled at the Branch Heads Forum.	R	R

Services description	Price(exclusive of VAT)	Price(<i>inclusive of</i> VAT)
Phase 2 The service provider will: 4. Gather inputs from Branch Heads Forum, which will then be incorporated on the draft Annual Performance Plans based on workshop conversations for submission to NT and DPME on the last day of October for each year. 5. Assist to address the recommendations from National Treasury and DPME on the Draft Annual Performance Plans, for 2026/27. Use the planning tools for situational analysis to prepare a draft Situational Analysis report, which must provide an analysis of the external and internal environment in which The Presidency operates. This must give a critical review of The Presidency in relation to its performance and organisational environment, and support the framing of critical issues, which influence the content of the organisation's future plans. The situational analysis report will be; i) an input report on assessment of the examination of trends, ii) the effectiveness of existing programmes, iii) key strategic issues facing The Presidency, iv) key dynamics in the environment likely to impact the work of The Presidency, v) stakeholder's expectations for key programmes, and vi) organisation's strengths and weaknesses. 6. Facilitate the second Strategic Planning and Review Session for Senior Management Services (attendance of workshop and actual facilitation) after the State of the Nation's Address (SONA) and January Cabinet Lekgotla. 7. Develop a report from the Strategic Planning and Review Sessions and development and finalisation of the Annual Performance Plans.	R	R

Services description	Price(exclusive of VAT)	Price(<i>inclusive of VAT</i>)
Phase 3 8. The Service Provider will have to re-worked the plan based on the pre-audit by the Auditor General (AG) to determine whether it meet the set legislative standard. These also include all the re-iterations required by the Executive Management, Internal Audit, DPME and NT to prepare the Plan to the required quality standard, prior to printing and tabling the plans. 9. The service provider must assist with conducting Branch and Unit Operational Planning session after the finalisation of the Annual Performance Plan. The service provider will have to develop aligned Branch and Unit Operational Plans for all branches and Units in The Presidency for 2026/27. The service provider must co-facilitate and produce the write up of all Branch and Unit Plans for 2026/27.	R	R
Total price	R	R

All prices must be VAT inclusive

COMPANY NAME:.....

SIGNATURE OF BIDDER:.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE: