

## **Request for Proposals for the Appointment of a Service Provider to Develop a Set of Flagship Legacy Publications to Commemorate the 30-Year Anniversary of SALGA**

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**Closing date and time: 15 July 2026 at 11h00**

**Bid Validity Period: 60 days**

**For Enquiries**

**TEL: (012) 369 8000**

**EMAIL: [scm@salga.org.za](mailto:scm@salga.org.za)**

**WEBSITE: [www.salga.org.za](http://www.salga.org.za)**

**PLEASE NOTE THAT SALGA LAUNCHED A FULLY AUTOMATED SUPPLY CHAIN MANAGEMENT PLATFORM. TO REGISTER AS A SUPPLIER ON THE PORTAL AND SUBMIT THE RESPONSE TO THIS TENDER.**

**PLEASE CLICK THE LINK BELOW:**

**<https://scmportal.salga.org.za/>**

## 1. INTRODUCTION

The South African Local Government Association (SALGA) is established by the Organised Local Government Act (Act 52 of 1997) to assist in the comprehensive transformation of local government in South Africa. 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 29 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** refer 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** refer 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** refer 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) to develop a set of flagship legacy publications that will preserve, document and institutionalise the history, impact, evolution and future direction of organised local government in democratic South Africa. This initiative is aligned to the broader objectives of SALGA @ 30, particularly the pillars relating to Institutional Memory, Leadership Transition, Democratic Reflection and Future Fitness.

### **4. BACKGROUND**

SALGA @ 30 marks three decades of organised local government in South Africa and is positioned as a flagship institutional programme aligned to three defining national milestones: 30 Years of Democracy (April 2026), the 2026 Local Government Elections (November 2026), and the induction of new SALGA leadership in March 2027.

The programme extends beyond celebration to serve as a strategic platform for strengthening democratic participation, reinforcing public trust in municipalities, supporting leadership transition, and building organisational culture.

Anchored in the SALGA Elevate Campaign and integrated with SALGA Connect, SALGA @ 30 is designed as a year-plus national journey delivered through coordinated internal and external activations, engaging multiple stakeholder groups including municipalities, communities, government partners, media, civil society, youth and SALGA employees.

Implementation will be supported by a multi-pronged marketing and communication approach, leveraging owned, earned, shared and experiential platforms including strategic media partnerships, digital channels, community radio, stakeholder engagements, exhibitions and staff activations to ensure broad national reach, consistency of messaging and meaningful participation.

The official SALGA anniversary date of 21 November will be treated as a symbolic anchor moment within the broader programme, deliberately positioned alongside the Local Government Elections to reinforce the message that democracy is built and sustained at local level.

Through integrated storytelling, civic education, employee engagement and legacy-building SALGA @ 30 elevates the role of municipalities while reaffirming SALGA's position as the voice of local government in South Africa's democratic project and preparing the institution for its next chapter under the 7th Local Government Administration.

### **5. ABOUT THE PUBLICATIONS**

It is against this background that SALGA is developing a set of legacy publications to commemorate SALGA @ 30. The publications are intended to serve not only as commemorative assets, but as strategic institutional tools that strengthen governance continuity, leadership transition, organisational identity and democratic memory within local government. They must collectively position SALGA as both the custodian and convener of the local government story over the past 30 years.

This project forms part of a broader democratic memory preservation initiative aimed at ensuring that the evolution of local government in democratic South Africa is formally documented, archived and transferred to future generations of leadership.

This work takes place within a significant national context, coinciding with:

- 30 Years of Democracy in South Africa;

- The 2026 Local Government Elections;
- SALGA's 30th Anniversary in November 2026; and
- The transition into the 7th Local Government Administration in 2027.

The publications must therefore go beyond celebration. They must critically capture the evolution of democratic local government, honour leadership and institutional contributions, document municipal impact, preserve organisational memory, and provide a future-facing reflection on the next chapter of local government in South Africa.

The intention is to produce **two distinct but complementary publication streams**:

1. A **premium Coffee Table Legacy Book** focused on visual storytelling, leadership reflection, democratic milestones, municipal impact and the human story of organised local government; and
2. A **comprehensive institutional reference publication** ("The SALGA Bible/Compendium") that serves as the definitive archival, governance, policy and historical record of SALGA and democratic local government over the past 30 years.

The intention is for preliminary draft outputs to be presented to the NEC and Presidency during November 2026 as part of the SALGA @ 30 milestone reflections and anniversary activities. Final refinement, production and ceremonial handover are envisaged for the SALGA National Conference in February/March 2027 as part of the transition into the 7th Administration.

### **5.1 SALGA @ 30 Coffee Book Table**

The book must:

- Humanise the institution of SALGA and system of local government
- Celebrate democratic progress while remaining honest about challenges
- Showcase municipalities as the frontline of democracy
- Position SALGA as the voice and convenor of organised local government
- Balance political leadership, administration, communities and institutional reform
- Blend history, storytelling, photography, archival imagery and thought leadership
- Voices for the ground - Capture voices from communities, municipal practitioners, workers, youth, traditional leadership and citizens to ensure the publication reflects the lived experience of local democracy beyond institutional leadership.

#### **Tone:**

Reflective. Proud. Nation-building. Human-centred. Future-facing.

#### **Proposed Audience:**

- NEC and Presidency
- Incoming 7th Administration leadership
- Provincial leadership
- Municipal executives and mayors
- National government

- International partners
- Media and academia
- Future generations of SALGA leadership

## **5.2 SALGA Compendium**

The archival research for the coffee book table will feed into the development of the compendium. The purpose of this publication is to develop the definitive institutional, governance and historical reference publication on SALGA and democratic local government in South Africa over the past 30 years.

Unlike the Coffee Table Book, this publication must function as:

- An institutional memory archive
- A governance and policy reference source
- A leadership induction resource
- A historical and academic record
- A strategic handover document to the incoming 7th Administration
- A long-term knowledge repository for future leaders, researchers and policymakers

### **Tone:**

Authoritative. Reflective. Intellectual. Strategic. Nation-building.

### **Strategic Intent:**

The publication must answer:

- How has democratic local government evolved since 1996?
- What role has SALGA played in shaping local governance?
- What institutional lessons have emerged?
- What reforms succeeded or failed?
- What future reforms are required?
- What must the next generation of leadership understand?

## **6. KEY OBJECTIVES OF THE PROJECT**

Together, these publications must:

- Preserve institutional memory;
- Capture oral histories and leadership reflections;
- Strengthen leadership continuity and transition;
- Create a permanent archive of SALGA and local government;
- Support induction of incoming NEC and Provincial Leadership;
- Position SALGA as a thought leader and custodian of local government history; and
- Contribute to South Africa's broader democratic and governance archive.

## 7. ARCHIVAL RESEARCH METHODOLOGY

The archival research methodology for the SALGA @ 30 legacy publications should combine historical document analysis, archival retrieval, oral history collection, visual asset curation and evidence verification to ensure that the final outputs are both credible and institutionally authoritative. The methodology should support the development of a robust democratic memory record that captures the formation, evolution, milestones, leadership transitions and impact of SALGA and organised local government over the past 30 years.

### Archival Scoping and Source-Mapping

Sources will include SALGA internal records, NEC minutes and resolutions, annual reports, strategic plans, provincial office records, municipal records, national archival repositories, media archives, partner institution records and, where appropriate, private collections held by former leaders or officials.

This phase should produce a preliminary source inventory, identify gaps in the evidence base, and clarify access requirements, permissions and responsibilities for collection.

### Structured Collection and Review

Sources will include priority archival materials founding records, governance records, conference declarations, policy and strategy documents, speeches, photographs, audiovisual material, correspondence, milestone publications and documentary records that illuminate key phases in SALGA's institutional journey.

Materials should be selected on the basis of their authenticity, relevance, condition, historical significance and suitability for publication and preservation.

### Triangulation and Verification

Key facts, dates, names, institutional events and milestones should be cross-checked against multiple sources wherever possible. This is especially important for leadership chronologies, constitutional and governance developments, major policy reforms, conference outcomes and commemorative milestones.

Any inconsistencies or contested accounts should be flagged, reviewed and resolved through a documented verification process before inclusion in the final publication outputs.

### Oral History

Oral history interviews should be conducted with former and current SALGA leaders, municipal practitioners, administrators, governance experts and other key actors who have shaped organised local government. Interviewee selection will be guided by thematic relevance, institutional significance and representation across leadership periods, provinces and functional roles. Interviews should be supported by structured interview guides aligned to the research themes, and should be managed through clear consent, recording, transcription and validation protocols to ensure ethical and accurate use of testimony.

### Archival Curation and Preservation

This should take place in parallel to the research process to ensure that collected materials are not only used for the publication but also organised for long-term institutional memory purposes. This will include cataloguing and metadata capture, source referencing, digitisation standards, file naming conventions, version control, rights clearance and storage arrangements. Where visual materials such as photographs or scanned documents are

used, the team should maintain an image and asset register indicating provenance, permissions status, usage restrictions and publication readiness.

Overall, the archival research methodology is intended to ensure that the SALGA @ 30 project is not approached as a commemorative publication exercise alone, but as a structured democratic memory and institutional preservation process. It should therefore balance historical rigour, editorial usability, ethical documentation and future archival value.

## **8. SCOPE OF WORK**

### **8.1 Research, Develop and Archive**

The service provided is requested to:

- Conduct archival research across SALGA, municipalities and national archives
- Gather historic speeches, resolutions, reports and photographs
- Conduct oral history interviews with former leaders and administrators
- Source media archives and documentary material
- Develop province-by-province legacy inputs
- Curate municipal impact stories across various geographies (urban, rural, peri-urban)
- Verify all historical and constitutional references

SALGA will facilitate access to key informants and all archival materials.

### **8.2 SALGA @ Coffee Book Table Publication Design and Layout**

Premium coffee-table quality:

- Strong visual identity
- Full-colour photography
- Archival imagery
- Minimal dense text
- Elegant layouts
- Contemporary African institutional aesthetic
- Designed for display, eReader, gifting and ceremonial handover

### **8.3 SALGA Local Government Compendium Development**

The archival research for the coffee book table will feed into the development of the compendium, although it will be quite a distinct output. The compendium should include a searchable institutional memory database, and serve as a permanent institutional artefact for national archives, libraries, municipalities and stakeholders

The compendium should be developed into four volumes. The volumes below are neither exhaustive nor prescriptive. More volumes or a variation of volumes may be developed based on the research conducted and emerging themes:

### **Volume 1: Origins & Constitutional Foundations**

- Transition to democratic local government
- Constitutional framework
- White Paper evolution
- Intergovernmental relations
- Formation of SALGA

### **Volume 2: Institutional Evolution of SALGA**

- Governance evolution
- Leadership chronology
- Organisational development
- Provincial structures
- Strategic mandates and reforms

### **Volume 3: Local Government in Practice**

- Municipal systems
- Finance and infrastructure
- Service delivery evolution
- Urbanisation and spatial planning
- Disaster management
- Traditional leadership relations
- Community participation

### **Volume 4: Policy, Reform & National Influence**

- Fiscal reform
- Municipal powers and functions
- White Paper review
- Cooperative governance
- Climate and sustainability
- Digital governance and AI
- International relations and diplomacy

## **9. DELIVERABLES AND TIMELINES**

### **Phase 0: Inception and methodology**

1 month

Deliverables:

- Inception report

### **Phase 1: Archival scoping and source acquisition**

2 months

Deliverables:

- Archival scoping report
- Source inventory
- Oral history interview schedule

### **Phase 2: Collection and oral history fieldwork**

1 and ½ months

Deliverables:

- Image log with permissions status

### **Phase 3: Verification and thematic synthesis**

1 month

Deliverables:

- Verified chronology draft
- Fact-verification record and curated source base

### **Phase 4: Drafting of publication outputs**

1 and ½ months

Deliverables:

- Draft chapter framework

### **Phase 5: Executive preview draft**

1 month – due in November 2026

Deliverables:

- Leadership preview edition draft

### **Phase 6: Editorial refinement, design and production prep**

2 months

Deliverables:

- Draft design publication
- Photo library

### **Phase 7: Finalisation and handover**

1 and ½ month – due in February – March 2027.

Deliverables:

- Final SALGA @ 30 Coffee Table Book
- Final SALGA Local Government Compendium
- Digital companion excerpts for SALGA Legacy Hub

## 10. SKILLS REQUIRED AND SERVICE PROVIDER COMPETENCIES

The project should be undertaken by a multidisciplinary consortium or lead service provider with demonstrated expertise in:

- archival and historical research,
- oral history and institutional memory documentation,
- democratic governance and/or local government analysis,
- editorial development and long-form publication writing,
- visual and photographic archive curation,
- digitization, metadata and preservation systems,
- and premium publication design and production.

### Suggested team roles

- Project Director / Principal Investigator
- Senior Archivist or Heritage Research Specialist
- Oral History Lead
- Local Government / Public Governance Researcher(s)
- Managing Editor / Lead Writer
- Visual Archive / Image Research Specialist
- Digitization and Metadata Specialist
- Creative Director / Publication Designer
- Production Coordinator / Project Manager

## 11. CONTENT OF PROPOSAL

The proposal should, at a minimum, include:

- 11.1 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.
- 11.2 Summary of the bidder's mission statement, the vision statement, values and long-term strategies and objectives as comprehensively as possible.
- 11.3 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.
- 11.4 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.

11.5 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.

11.6 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 as a traveling.

11.7 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.

11.8 In so far as is possible, provide an overview of the methodology to be applied.

## **12. DESCRIPTION AND EXTENT OF WORK (PROJECT MANAGEMENT)**

### **12.1 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 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.

### **12.2 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.

### **12.3 Quality assurance reviews of the work**

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

#### **12.4 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.

#### **12.5 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.

#### **12.6 Expenditure incurred by the bidder**

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

### **13. INSTRUCTION TO BIDDERS**

#### **13.1 General Instructions**

This document constitutes a Request for Proposal (RFP), which specifies SALGA's requirements for a service provider to render services on behalf of SALGA **to develop a set of flagship legacy publications that will preserve, document and institutionalise the history, impact, evolution and future direction of organised local government in democratic South Africa.** 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.

#### **13.2 Objectives**

SALGA's objective in the call for proposals is to select a service provider suitable for the undertaking of the task: **to develop a set of flagship legacy publications that will preserve, document and institutionalise the history, impact, evolution and future direction of organised local government in democratic South Africa.**

#### **13.3 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.

#### **13.4 Questions during Proposal Process**

Any enquiries regarding this RFP should be directed to Precious Nzuzi at [pnzuzi@salga.org.za](mailto:pnzuzi@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 [pnzuzi@salga.org.za](mailto:pnzuzi@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.

#### **13.5 Submission of Proposal**

**PLEASE USE THE BELOW LINK TO SUBMIT YOUR PROPOSAL.**

<https://scmportal.salga.org.za/>

Late submissions will not be accepted.

Bidders remain solely responsible for the method of conveyance of their proposal to the receiving point.

SALGA will not be responsible for any costs incurred by the bidders associated with the preparation of responses to the RFP.

#### **13.6 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.

#### **13.7 Termination of Contract**

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

**13.7.1 the winning bidder fails to perform in accordance with the specified service requirements as set out in the RFP.**

**13.7.2 the winning bidder otherwise violates the provisions of the RFP to a substantial degree.**

### **13.8 Liability**

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

### **13.9 Important Dates**

08 July 2026- Last day for questions

15 July 2026 - Proposal submissions due by 11h00

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

14.1 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.**

14.2 A contract will be signed with the appointed Service Provider.

14.3 The Service Provider will be required to sign confidentiality and indemnity agreements with SALGA.

14.4 SALGA may at its own discretion vary an instruction to include more work.

14.5 Failure to comply with any condition of this request for a proposal will invalidate respective tender proposal

14.6 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.

14.7 SALGA reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its project proposal.

14.8 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.

14.9 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.

14.10 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.

14.11 The bid offers and proposals should be valid and open for acceptance by SALGA for a period of 60 days from the date of submission.

14.12 Bidders are advised that submission of a project proposal gives rise to no contractual obligations on the part of SALGA.

14.13 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.

14.14 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.

- 14.15 All returnable bid documents must be completed in full and submitted together with the bidder's proposal.
- 14.16 SALGA will not be liable for costs incurred during the site visits or any other cost related to the submission of the bid.
- 14.17 Completion of the Standard Bidding Documents stated herein below is mandatory, failure to do so may render your bid offer invalid

#### 14.18 **Standard Bidding Forms**

##### 14.18.1 **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.

##### 14.18.2 **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.

## 15. **EVALUATION**

For the purpose of comparison and to ensure a meaningful evaluation, bidders must submit detailed information in substantiation of compliance with the evaluation criteria mentioned below. The bidder/s will be evaluated in three phases as stated below:

- Phase 1 pre-compliance check on Mandatory requirements
- Phase 2 Technical Functionality
- Phase 3 Price and BBBEE Status Level contribution

### **PHASE 1: MANDATORY REQUIREMENTS FOR THE BIDDER**

The prospective bidder must be registered on Central Supplier Database (CSD) before submitting bids.

NB: Failure to adhere to the Mandatory requirements above will automatically disqualify your bid/s and will not proceed to Phase 2.

### **PHASE 2: TECHNICAL FUNCTIONALITY**

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

**POINTS BREAKDOWN:**

CRITERIA FOR FUNCTIONALITY	BREAKDOWN OF POINTS		WEIGHT
<p><b>Approach and methodology:</b> The proposal should clearly describe the approach to following:</p> <ul style="list-style-type: none"> <li>• cataloguing and metadata standards</li> <li>• digitization and file naming conventions</li> <li>• source verification</li> <li>• version control</li> <li>• storage and backup arrangements</li> <li>• long-term preservation format requirements</li> <li>• rights clearance for publication and digital use</li> <li>• The methodology described in the proposal should meet the requirements of the archival research methodology as explained in the request for proposals.</li> </ul>	<b>Rating</b>	<b>Descriptor</b>	<b>30</b>
	0	No methodology or approach described	
	6	Approach and methodology lacking in detail	
	12	Approach and methodology not suitable for the scope of work	
	18	Adequate proposal, covers content and method that meets the minimum requirements	
	24	Proposal exceeds minimum requirements, extensively details approach and methodology	
	30	Exceptional proposal that encompasses an innovative approach to scope of work and methodology	
<p><b>Project Plan</b> Bidders must provide a project plan with a timeframe flowchart indicating start and completion time per proposed activity. The project plan must be informed by the deliverables and scope of work of the project.</p>	<b>Rating</b>	<b>Descriptor</b>	<b>20</b>
	0	No project plan submitted	
	4	Technical proposal without project plan	
	8	Project plan included without clear timelines	
	12	Project plan included with clear timelines	
	16	Project plan included with a timeline flowchart, and clear methods	
	20	Project plan included with timeline flowchart, clear methods, and innovation ideas	
<p><b>Relevant and appropriate project experience:</b> Demonstrated experience and expertise in one or more of the following:</p> <ul style="list-style-type: none"> <li>• archival and historical research,</li> </ul>			<b>25</b>

CRITERIA FOR FUNCTIONALITY	BREAKDOWN OF POINTS		WEIGHT
<ul style="list-style-type: none"> <li>oral history and institutional memory documentation,</li> <li>democratic governance and/or local government analysis,</li> <li>editorial development and long-form publication writing,</li> <li>visual and photographic archive curation,</li> <li>digitization, metadata and preservation systems,</li> <li>and premium publication design and production.</li> <li>The bidder must provide SALGA with proof of similar work undertaken in the form of appointment letter and/or a positive letter of recommendation from various clients on the clients' letterhead.</li> <li>The most recent reference letter should cite work that has been completed within the last 5 years.</li> </ul> <p><b>(N.B. SALGA reserves the right to verify the letters submitted by service providers)</b></p>	<b>Rating</b>	<b>Descriptor</b>	
	0	Bidder with no previous experience – 0 reference letter	
	5	Bidder with 1 similar previous project experience – <b>1 reference letter</b>	
	10	Bidder with 2 similar previous project experience – <b>2 reference letters</b>	
	15	Bidder with 3 similar previous project experience – <b>3 reference letters</b>	
	20	Bidder with 4 similar previous project experience – <b>4 reference letters</b>	
<p><b>Team Qualifications, Knowledge, and Experience:</b></p> <ul style="list-style-type: none"> <li>The personnel performing the service must possess relevant experience and knowledge and qualifications related to archival research, publications design &amp; production, digital cataloguing, and institutional preservation.</li> <li>The project team must have a variety of relevant qualifications to undertake the project.</li> <li>The project team leader must have at least 5-years of relevant experience conducting archival projects of this scale.</li> </ul>	<b>Rating</b>	<b>Descriptor</b>	25
	0	Bidder with no project team CV / Profiles, with no experience and no qualification	
	5	Project team CV/Profiles provided, indicating <b>2-year experience</b> and a relevant <b>graduate qualification</b>	
	10	Project team CV/Profiles provided, indicating <b>3-year experience</b> and a relevant <b>graduate qualification</b>	
	15	Project team CV/Profiles provided, indicating <b>4-year experience</b> and a <b>postgraduate qualification</b>	
	20	Project team CV/Profiles provided, indicating <b>5-year experience</b> and a <b>postgraduate qualification</b>	

CRITERIA FOR FUNCTIONALITY	BREAKDOWN OF POINTS		WEIGHT
	25	Project team CV/Profiles provided, indicating <b>5-years or more experience</b> including a <b>postgraduate qualification</b>	
<b>Total for functionality</b>			<b>100</b>
<b>Minimum threshold score</b>			<b>70</b>

**NB: Only Bidders who score 70 (average) points and above will be considered in phase 3 of the evaluation.**

### PHASE 3: PRICE AND BBEE STATUS LEVEL CONTRIBUTION

The 80/20 points system will be used when evaluating this Request for Proposal. The remaining 20 points will be allocated in terms of specific goals below.

The maximum points for this tender are allocated as follows:

Table 1:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	10
2	9
3	7
4	6
5	4
6	3
7	2
8	1
<b>Specific Goals</b>	
SMME's	4
100% Black Women owned	3
100 % Youth	3
<b>Total Points</b>	<b>20</b>

Phase 3 of evaluation will include the sum of the two criterions below:

CRITERIA	WEIGHT
Price	80
B-BBEE status level of contribution	10
Specific Goals	10
<b>TOTAL</b>	<b>100</b>

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.

## **16. 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.
- SALGA reserves the right not to award the bid to any bidder at its own discretion.