



SOUTH AFRICAN TOURISM

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RFQ-020-OCEO-2022

Dear Bidder

Subject Matter: Request for Quotation (RFQ) – External capacity for mid-term assessment of five-year strategic plan 2020 – 2025.

South African Tourism Board (SA Tourism) was established by section 2 of the Tourism Act, 1993 (Act No. 72 of 1993) and continues to exist in terms of section 9 of the Tourism Act, 2014 (Act No. 3 of 2014) as amended. SA Tourism is also Schedule 3 Part A public entity in terms of the Public Finance Management Act, 1999 (Act No. 1 of 1999).

SA Tourism is mandated in terms of the Tourism Act to provide for, amongst others, the development and promotion of sustainable tourism for the benefit of the Republic, its residents and its visitors. It is common cause that tourism is a key strategic industry in terms of The National Development Plan and the National Tourism Sector Strategy as it supports governments' objectives to alleviate the triple challenges of unemployment, poverty and inequality.

Section 217 of the Constitution of the Republic of South Africa, 1996, provides that goods and services must be contracted through a system that is fair, equitable, transparent, competitive and cost-effective and confers a constitutional right on every potential supplier to offer goods and services to the public sector when needed.

Having regard for the aforementioned SA Tourism is hereby extending an invitation to your firm, as part of an RFQ process, to submit a cost proposal for **External capacity for mid-term assessment of five-year strategic plan 2020 – 2025.**

Background and Scope of Work

South African Tourism requires professional, short-term, expertise to execute the full production of the Mid-term Assessment Report, which include copywriting, copy editing, design and layout, sourcing of images, quality assurance and printing of the Mid-Term Assessment Report for South African Tourism for the period 1st April 2020 to 30th September 2022, which is based on the entity's Five-Year Strategic Plan for the period 2020 – 2025.

The Mid-Term Assessment Report assesses the first two and a half years of implementation of the Five-Year Strategic Plan, with particular reference, but not limited, to:

- the delivery of outcomes in relation to the priorities of government
- the extent to which South African Tourism has succeeded in achieving each of the strategic outcome oriented goals and objectives set at the beginning of the five-year period

- an analysis of SA Tourism's Five-Year Strategic Plan in relation to the organisation's performance
- all studies and evaluations conducted during the period, including but not limited to:
 - programme / project evaluations
 - corporate brand index
 - brand strength index
 - business events brand score
- all reports prepared by South African Tourism focusing on performance of destination South Africa and performance of the organisation including, but not limited, to:
 - reports assessing performance of the tourism sector locally, regionally and globally;
 - social listening insights reports generated by SA Tourism
 - Annual Reports of SA Tourism
- an analysis of global changes that have implications for the organisation's work for the remainder of the five-year term
- recommendations on changes / amendments to the Five-Year Strategic Plan for the remaining term
- recommendations about performance, budgeting and planning improvement for the Strategic Plan's remaining
- financial years.

Mid-Term Assessment Reports must be finalised by the end of November in the third year of implementation of the Strategic Plan within a particular planning period and must reflect performance during the first two and a half years of the planning cycle. Reported information must be valid at the time of reporting. Having noted this, the Mid-Term Assessment Report must be approved by the Board of South African Tourism no later than 31st October 2022 in order to table with report with the relevant oversight authorities by 30th November 2022.

The Mid-term Assessment Report must be approved by the Executive Authority and submitted to Parliament. The approved Mid-term Assessment Report must be submitted to the DPME within two weeks after approval. The report must be published on the SA Tourism website.

Oversight institutions must use Mid-term Assessment Reports during the assessment of draft APPs for the next financial period. The entities must establish processes to use the Mid-term Assessment Report to inform the development of the APP in the next financial year and the Strategic Plan in the following planning cycle.

The following is required in relation to the publication of the Mid-term Assessment Report:

- 30 printed copies of approved Mid-Term Assessment Report that meet the following technical specifications:
 - Size: 297 x 210mm Portrait.
 - 180pg Text: Printed in 4 process colours throughout of 130gsm
 - 4Pg Cover: Printed in 4 process colours on both sides of 250gsm
 - Hi-Q Matt Art +matt laminate & spot
 - Gloss UV varnish to one side only
 - Trimmed, collated and perfect bound with cover drawn on.

The **key deliverable** for the business requirement is the full production of the Mid-term Assessment Report.

In giving effect to this key deliverable, the **minimum outputs** are:

1. Project plan outlining key milestones, timelines, dependencies and resource allocation that will be approved by Head: SPEPM
2. Establishment of a task team to work with South African Tourism in ensuring the success of this project that will be chaired by the Head: SPEPM
3. Providing secretariat support to the task team referred to in point 2 above as the task team would meet on a regular basis to provide status reports on the project
4. Review of all information, data, reports, studies, etc that inform the key deliverable

5. Interviews and/or meetings with relevant business units, ExCo and Board in the preparation of the key deliverable and its approval
6. Drafting the Mid-term Assessment Report including revisions until the final version is approved
7. Designing and printing and the Mid-term Assessment Report with the CEO's approval of the final design and layout
8. Producing a digital version in line with requirement for publication on SA Tourism's digital platforms.

Important considerations in giving effect to the business requirements are:

The service provider is expected to align the structure and content of the Mid-term Assessment Report to the guidelines that will be published by government as and when it becomes available. The proposal by the service provider must make clear provision for this amendment, should it be required, the extent of which cannot be determined at this stage.

Various engagements with ExCo and the Board may be required for them to consider and approve the Mid-term Assessment Report, the time for which cannot be estimated at this stage. The service provider needs to consider this in their proposal.

The service provider may need to be available on short notice and after normal office hours.

Required Expertise

The selected service provider must demonstrate competence and qualifications for the scope of work in terms of detailed knowledge and experience in public sector monitoring, evaluation and reporting as well as project management. Interested companies must be able to demonstrate measurable success in:

- Public sector policy development and implementation.
- Public sector monitoring, reporting and evaluation.
- Public sector project management.

1. Format of proposal

1.1 Bidders must complete and return all the necessary standard bidding documents (SBD's) attached to this request with technical and financial proposals.

1.2 Bidders are advised that their proposals should be concise, written in plain English and simply presented in the same order as indicted below:

- (a) Cover letter introducing your firm and credentials, capacity, capability and experience for this assignment;
- (b) National Treasury Centralized Supplier Database (CSD) registration summary report with a valid tax status;
- (c) Valid certified copy of B-BBEE certificate;
- (d) Bidders must have specific experience and submit at least three recent references (in a form of written proof(s) on their client's letterhead including relevant contact person(s), office telephone & fax number, website and email address) where similar work were undertaken.
- (e) Overview of the methodology your firm will apply for this assignment;
- (f) Project/assignment approach and plan which outlines the activities to be undertaken during the process;
- (g) Outline of the qualifications and related experience of the proposed resources that will be assigned to the matter;
- (h) Financial proposal to deliver the assignment including any other cost SA Tourism should be aware off for the successful completion of the assignment;

- (i) Declaration of Interest – SBD 4;
- (j) Preference Point Claim Form – SBD 6.1;
- (k) Declaration of Bidder's Past Supply Chain Management Practices – SBD 8; and
- (l) Independent Bid Determination – SBD 9.

2 Cost structure and project plan:

- 2.1 Bidders must submit the total bid price for the assignment based on the skills, resources and time allocated in providing the services.
- 2.2 Bidders should also propose innovation in their technical proposals to keep the cost to a minimum where SA Tourism will still benefit from the best possible qualitative outcome. SA Tourism reserves the right to request additional information or clarity on cost proposals prior to the evaluation thereof.

3 Evaluation Method

- 3.1 The evaluation process of bids will comprise of the following phases:

Phase 1	Phase 2	Phase 3
Administration and Mandatory bid requirements	Functionality	Price and B-BBEE
Compliance with administration and mandatory bid requirements.	Bids will be evaluated in terms of functionality.	(a) The bidders that have successfully progressed through to Phase 2 will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act, 2000 (b) 80 points will be awarded for price while 20 points will be allocated for preference points for BBEE as prescribed in the regulations.

3.2 Points awarded for functionality:

EVALUATION CRITERIA	Rating					Weight
	1	2	3	4	5	
The Bids will be evaluated on a scale of 1 – 5 in accordance with the criteria below. The rating will be as follows: 1 = Very poor, 2 = Poor, 3 = Good, 4 = Very good, 5 = Excellent						
<u>Experience and Knowledge:</u> Bidder's relevant experience and knowledge in public sector policy development; public sector programme monitoring, evaluation and reporting as well as public sector project management. Score of 1 = 5 to 8 years' experience in all fields mentioned above Score of 2 = 8 to 12 years' experience in all fields mentioned above Score of 3 = 12 to 15 years' experience in all fields mentioned above Score of 4 = 15 to 20 years' experience in all fields mentioned above Score of 5 = More than 20 years' experience in all fields mentioned above						25

Approach and ability to meet deliverables: Bidders must provide a detailed description of how they intend executing the services from inception to completion. This must include: 1. Methodology to undertake the scope of work 2. Alignment of proposed methodology to the prevailing regulatory frameworks and guidelines and an articulation of the application of these to the methodology to be deployed 3. Detailed project plan indicating milestones and related timelines	50
Track record: The bidders are required to provide contactable client references where their services can be verified. References should be presented in the form of a written letter on an official letterhead from clients where similar services have been provided and should not be older than four (4) years. No appointment letters from clients will be accepted as reference letters. Score of 1: One contactable reference within last 4 years Score of 2: Two contactable references within last 4 years Score of 3: Three to four contactable references within last 4 years Score of 4: Five contactable references within last 4 years Score of 5: More than five contactable references within last 4 years	25
TOTAL POINTS FOR FUNCTIONALITY	100
A threshold of 70% is applicable.	

“**functionality**” means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, considering, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder.

- I. Bids will be evaluated strictly according to the bid evaluation criteria stipulated in this section.
- II. Bidders must, as part of their bid documents, submit supportive documentation for all functional requirements. The official responsible for scoring the respective bids will evaluate and score all bids based on bid submissions and the information provided.
- III. The score for functionality will be calculated in terms of the 1 - 5 rating scale as shown in the functionality criteria matrix under paragraph 4.2.
- IV. The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These scores will be added and expressed as a fraction of the best possible score for all criteria.
- V. The points for functionality and the points for B-BBEE level of contribution will be added together and the proposal from the bidder which meets the highest score will be deemed the preferred proposal.

4. **Awarding of Points for Price and Broad-Based Black Economic Empowerment**

The bidders that have successfully progressed through to Phase 3 (bidders who meet the minimum threshold for the functionality of **(70%)**) will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations of 2017.

80 points will be awarded for price while 20 points will be allocated for preference points for BBEE as prescribed in the regulations.

Points for B-BBEE level of contribution will be awarded in accordance with the below table: -

B-BBEE Status Level of Contributor	Number of Points
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1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

5. **Adjudication and Final Award of Bid**

The successful bidder will usually be the service provider scoring the highest number of points for comparative price and BBEE level of contribution or it may be a lower scoring bid on justifiable grounds or no award at all.

6. **National Treasury Centralized Supplier Registration and B-BBEE Certificates**

6.1 All bid submissions must include a copy of successful registration on National Treasury's Centralized Supplier Database (CSD) with a valid tax clearance status and an original or certified copy of a B-BBEE verification certificate (if you have been assessed).

6.2 Proposals which do not include these documents will not be considered.

7. **Deadline for submission**

All proposals must be e-mailed, in PDF format, to quotes@southafrica.net no later than **12H00 on Monday, 20 June 2022** and should remain valid for at least 45 days after the closing date.

8. **Confidentiality**

The request for a technical and cost proposal and all related information shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid. All bidders are bound by a confidentiality agreement preventing the unauthorized disclosure of any information regarding SA Tourism or of its activities to any other organization or individual. The bidders may not disclose any information, documentation or products to other clients without written approval of SA Tourism.

9. **Terms of engagement**

Prior to commencing with the assignment, the successful bidder will be required to meet with the SA Tourism's Head of Risk to finalize the statement of work (SOW) and criteria for approval.

10. **Payments**

10.1 No advance payments will be made in respect of this assignment. Payments shall be made in terms of the deliverables as agreed upon and shall be made strictly in accordance with the prescripts of the PFMA (Public Finance Management Act, 1999. Act 1 of 1999).

10.2 The successful bidder shall after completion of the contract, invoice SA Tourism for the services rendered. No payment will be made to the successful bidder unless an invoice complying with section 20 of VAT Act No 89 of 1991 has been submitted to SA Tourism.

10.3 Payment shall be made into the bidder's bank account normally 30 days after receipt of an acceptable, valid Invoice.

11. Non-compliance with delivery terms

The successful bidder must ensure that the work is confined to the scope as defined and agreed to. As soon as it becomes known to the bidder that they will not be able to deliver the services within the delivery period and/or against the quoted price and/or as specified, SA Tourism's Head of Risk Management must be given immediate written notice to this effect.

12. Retention

Upon completion of the assignment and / or termination of the agreement, the successful bidder shall on demand hand over to SA Tourism's Head of Risk Management all documentation, information, etc... relevant to the assignment without the right of retention.

13. Cost

The bidder will bear all the costs associated with the preparation of the response and no costs or expenses incurred by the bidder will be borne by SA Tourism.

14. Cancellation of the request for a technical and cost proposal

SA Tourism may, prior to the award of the bid, have the right to cancel the bid if:

- (a) Due to changed circumstances, there is no longer a need for the service; or
- (b) Funds are no longer available to cover the part and/or total envisaged expenditure; or
- (c) No acceptable bids are received.

SA Tourism reserves the right to withdraw this request for technical and cost proposals, to amend the term or to postpone this work by email notice to all parties who have received this request.

14. Clarification

Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning this request for technical and cost proposals, is to be requested in writing from the Sourcing Specialist

Thanking you and looking forward to your proposal in this regard.

Yours in Tourism