



cooperative governance

Department:
Cooperative Governance
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP TRAINING MATERIAL AND ROLLOUT TRAINING FOR IMPLEMENTATION OF THE LOCAL GOVERNMENT: MUNICIPAL STAFF REGULATIONS AND GUIDELINES FOR A PERIOD OF 36 MONTHS

1. Purpose of assignment

The purpose of these Terms of Reference (ToR) is to invite bids for appointment of a service provider to develop training material and rollout training for implementation of the Local Government: Municipal Staff Regulations and Guidelines for a period of 36 months.

2. Introduction and background

2.1 Local government is charged with the responsibility to provide basic municipal services as contained in Part B of Schedule 4 and Part B of Schedule 5 of the Constitution for the overall social and economic upliftment of local communities in its capacity as a third sphere of government. To realise this imperative, the Constitution obliges municipalities to structure and manage their administration within a framework of policies and procedures consistent with norms and standards set by the Minister, in such a manner as to give priority to the needs of communities and employ personnel with the relevant skills and expertise necessary for the effective performance of their functions.

2.2 The Constitution empowers national and provincial government, by legislative and other measures, to support and strengthen the capacity of municipalities to perform their functions. Chapter 7 of the Municipal Systems Act, 2000 ("the Systems Act") provides a contextual framework for local public administration and human resource management. The Systems Act empowers the Minister responsible for local government to make regulations or issue guidelines setting uniform standards for municipal staff systems and procedures. Since the new transformation agenda was adopted, the system of local public administration has undergone substantial reforms. The Department has to date promulgated the following regulations in fulfilment of the Minister' regulatory authority referred to above:

- (a) Local Government: Municipal Performance Regulations for Municipal Managers and Managers Directly Accountable to Municipal Managers, 2006;
- (b) Local Government: MFMA: Municipal Regulations on Minimum Competency Levels, 2007;
- (c) Local Government: Regulations Regarding the Participation of Municipal Staff Members in Municipal Elections, 2011;
- (d) Local Government: Disciplinary Regulations for Senior Managers, 2011; and
- (e) Local Government: Regulations on appointment and conditions of employment of senior managers, 2014.

2.3 Despite such evidence of progress in the transformation of municipal local public administration and human resources, some municipalities are still beset with service delivery, governance and institutional challenges. In fulfilment of government' commitment to build a capable local government and improve sound governance in municipalities, the Department has finalised the development of the Municipal Staff Regulations aimed at ensuring that persons of high calibre are recruited and have a career path within local government while strengthening national and provincial government' oversight. The design and development of learning material and training on the implementation of the Regulations will be rolled out over a period of 36 months from date of commencement. Training will be provided to the DCoG Project Management Office (PMO), provincial coordinators, municipal HR functionaries, senior managers and

councillors with a view to build ongoing capacity for monitoring and support by national and provincial government and to improve on governance in municipalities.

3. Problem Statement

3.1 The absence of uniform standards for municipal staff systems, especially for staff below management echelon, has encouraged municipalities to adopt disparate, fragmented and incoherent human resource practices inconsistent with the constitutional principles as contained in Chapter 10 of the Constitution. An assessment of the performance of all municipalities by the Department has revealed -

- (a) low human resource and financial capacity in municipalities;
- (b) high incidence of irregular and inappropriate appointments;
- (c) poor skills development programmes;
- (d) ineffective leadership and institutional management;
- (e) ineffective revenue collection strategies resulting in the burgeoning municipal debt,
- (f) weak financial controls and negative audit outcomes;
- (g) lack of effective performance management systems and accountability; and
- (h) huge service delivery backlogs culminating in “service delivery” protests.

3.2 It is against this backdrop that the Department is looking for an experienced and qualified training provider, joint venture or consortium of training providers with the requisite capacity and capability to develop training material and undertake training on the implementation of the Municipal Staff Regulations in fifty-two sites (i.e. 44 district municipalities and 8 metropolitan municipalities).

3.3 Service providers are expected to submit detailed project plans, and methodologies clearly specifying output targets and milestones, required specifications, systems development, including implementation plans.

4. Scope of the assignment

The successful bidder will be required to develop a Project Charter, including a costed and detailed Project Plan, which must be co-signed by the parties before commencement of work on this project.

4.1 *Training material/ manuals for implementation of the Municipal Staff Regulations and Guidelines*

(a) The successful service provider will be required to develop one set each of the 1) face-to-face content delivery and 2) online training delivery. The programme will be delivered as a non-accredited course and certificate of attendance will be issued upon completion of each training content for both 1) online training delivery or face-to-face delivery.

(i) Face-to-face content

- (aa) Conceptualise and design the graphic layout of the training material that is visually attractive, subject to DCoG’ branding and approval;
- (bb) An approved layout and design will be used in the development of the facilitator and trainee’ guides which cover the entire spectrum of the scope of the Regulations;
- (cc) All paper-based content will be Desk Top Published (DTP) in high quality;
- (dd) The content of training must include, but not limited to facilitator/ trainer’ guide, trainee guide and PowerPoint slides to support the facilitated lessons, including where necessary, video footage, photographs and supporting material;
- (ee) Develop appropriate training exercises buttressed by role-plays, case studies, group discussions, etc.
- (ff) Provide editing, proof reading and copywriting services, including overall quality assurance of the final lay version of the training material;
- (gg) Consider appropriate training methods to accommodate varying target groups (i.e. HR managers/ functionaries, municipal executives and councillors);
- (hh) Develop mechanisms to assess trainees’ understanding of the Regulations;

(ii) Online content

- (aa) Develop an online content using full interactive multimedia delivery methods (narrative voice, video animation and text) appreciating appropriate training methods needed to accommodate varying target groups (i.e. HR managers/ functionaries, municipal executives and councillors).
- (bb) A screen layout as agreed with the DCoG to be implemented throughout the content.
- (dd) The content of training must include, but not limited to online:
 - Training lessons.
 - Facilitators/ trainer guide.
 - Trainer' guides for different targeted groups.
 - Photographs, narrated voice, video animation and text.
 - PowerPoint slides to support the facilitated lessons, role-plays, case studies, group discussions, etc.
 - Copywriting protected content.
 - Electronic assessment.

NOTE: Due to Covid-19 pandemic, online content delivery will be the preferred mode unless there is evidence to proof that this delivery mode is impractical due to reasons beyond trainees' control therefore a cost-breakdown on both online and face-to-face training per session should be included in the proposal. Face-to-face training will be conducted in a classroom set-up.

- (b) The specification of the training material/ manuals is as follows:
 - (i) Twenty (20) hard copies of the Local Government: Municipal Staff Regulations and Guidelines for Implementation of the Regulations consisting of ±813 A4 pages compressed to A5 size perfect book binding, including electronic copies on USB and related training material
 - (ii) Finishing – twenty (20) copies of A5 perfect book binding.
 - (iii) Paper stock inside pages - 135 gram per square meter, white;
 - (iv) Printing - Black and white inside pages;
 - (v) Paper stock cover for other booklets/ material - 350 gram per square meter, Matt;
 - (vi) Printing of cover - Full colour cover with DCoG logo/ branding;
 - (vii) Font type - Arial (body)
 - (viii) Font size - 12
 - (ix) Soft copy PDF with hyperlinks and optimised for website adaptable to IT systems of municipalities
 - (x) Soft copy in high resolution PDF Artwork source files;
 - (xi) Generic DL brochures - Printed in full colour both sides;
 - (xii) A corporate video to be produced of 4-6 minutes;
 - (xiii) Filmed footage of DCoG staff, selected trainees and key stakeholders;
 - (xiv) Integration with existing video material and DVD Full colour;
 - (xv) Pictures - sourced by supplier approved by the DCoG;
 - (xvi) Protocols for the exercises (i.e. role plays, case studies, group discussions exercises; and
 - (xvii) Adaptable PowerPoint Presentation for the roll-out of the Regulations.
- (c) Other obligations of bidders
 - (i) Conduct assessment and develop report for each district municipality per province within fourteen (14) days from the date of training; and
 - (j) Develop and submit a consolidated close-out report within 30 days from the last training session.

4.2 *Trainer/ learner management platform requirements*

- (a) An online training / learning management platform comprising, *inter alia*, open plan training platform (synchronisation into different official languages to accommodate different target groups where possible will be a strong recommendation) without carrying additional costs,
- (b) An open-source learning platform that enables trainers to create and serve their own dynamic training that extend learning anytime and anywhere in the Republic.

- (c) Online platform that can be customised to different setups allowing for the extension of functionality using plugins.
- (d) A training platform that allows adaptability (allow trainees to access the platform using MS Teams, Zoom, Google or Microsoft accounts) and support for user account creation and authentication with the option to add any number of user profile fields, including the import of user accounts from commonly used directory systems.
- (e) No license fees/ cost per user for the training platform required.
- (f) An open-source web conferencing platform / virtual training room enabling remote trainees to have a high-quality online training experience, including but not limited to these features:
 - Communication via audio, video, chat, etc
 - Real-time presentation sharing (including whiteboard).
 - Real-time screen sharing.
 - Virtual breakaway rooms.
 - Polling – question and answer capability.
 - Document sharing.
 - Creates multiple activity links to online training sessions.
 - Restrict trainees from joining a session until the trainer joins the session.
 - Creates a custom welcome message that appears at the top of the chat window when joining the training session.
 - Specify join open/ close dates for the session that appears in the calendar.
 - Record sessions.
 - Access and manage recordings.
 - Provides reporting mechanisms.
 - Supports mobile devices.
- (g) Interoperability to Android and Windows to enable trainees to browse the contents of their training programmes, even when offline.
- (h) Ongoing support to training of municipal staff through a dedicated portal, email or telephone.
- (i) Full remote backups and maintenance, when required.

4.3 *Training of trainers (DCoG PMO, Provincial Coordinators and Municipal HR Managers/ municipal executives and councillors*

The successful service provider must:

- (a) Undertake all logistical arrangements for training of municipal HR functionaries, senior managers and councillors in collaboration with the DCoG, including the development of a training programme.
- (b) Provide training to the DCoG Project Management Office (PMO) and Provincial Coordinators with a view to build ongoing capacity for monitoring and support by national and provincial government.
- (c) Provide training to municipal HR functionaries, senior managers and councillors over a three-year period to improve on governance.
- (d) The training costs may vary according to the nature and number of training sessions but may include the venue and catering per district, where applicable (Cost-breakdown should be provided for online and face-to-face training per session. The Department reserves the right to choose which training can be provided based on the budget).
- (e) The training programme will be as follows:

No.	Year	Targeted Audience	Number of Days per Session
1.	2021 – 2022	DCoG PMO and Provincial Coordinators	Bidders to submit proposals for approval by the DCoG
2.	2022 – 2023	Municipal HR Managers/ Functionaries of State of Local Government priority municipalities	Bidders to submit proposals for approval by the DCoG

		Municipal HR Managers/ Functionaries, Municipal Managers/ HoDs: Corporate Services of 18 identified district municipalities and their locals plus 3 metros	Bidders to submit proposals for approval by the DCoG
3.	2023 – 2024	Mayors and other Councillors of 18 identified district municipalities and their locals plus 2 metros	Bidders to submit proposals for approval by the DCoG

4.4 *Training targeted at the following metropolitan and districts municipalities with their locals (prioritisation of municipalities subject to change) for a period of 36 months:*

(a) 2022 – 2022 Financial Year (State of Local Government priority municipalities)

Province	District	Name
Eastern Cape	Sarah Baartman	Dr Beyers Naude Local
	Amathole	Mnquma Local
	Amathole	Amathole District
	Amathole	Amahlathi Local
	Amathole	Great Kei Local
	Amathole	Mbhashe Local
	Amathole	Ngqushwa Local
	Amathole	Raymond Mhlaba Local
	Joe Gqabi	Walter Sisulu Local
	Joe Gqabi	Joe Gqabi District
	Joe Gqabi	Elundini Local
	Joe Gqabi	Senqu Local
	O .R. Tambo	O R Tambo District
	Alfred Nzo	Alfred Nzo District
	Chris Hani	Chris Hani District
Free State	Metro	Mangaung Metropolitan
	Xhariep	Kopanong Local
	Lejweleputswa	Lejweleputswa District
	Lejweleputswa	Masilonyana Local
	Lejweleputswa	Tokologo Local
	Lejweleputswa	Matjhabeng Local
	Lejweleputswa	Nala Local
	Lejweleputswa	Tswelopele Local
	Thabo Mofutsanyana	Maluti-a-Phofung Local
	Thabo Mofutsanyana	Phumelela Local
	Thabo Mofutsanyana	Mantsopa Local
	Fezile Dabi	Ngwathe Local
	Fezile Dabi	Metsimaholo Local
	Fezile Dabi	Fezile Dabi District
Gauteng	Sedibeng	Emfuleni Local
KwaZulu Natal	Ugu	Ugu District
	uMgungundlovu	uMgungundlovu District
	uMgungundlovu	Mpofana Local

Province	District	Name
	Uthukela	Inkosi Langelibalele Local
	Uthukela	Uthukela District
	Umzinyathi	Umzinyathi District
	Amajuba	Amajuba District
	Zululand	Zululand District
	Umkhanyakude	Umkhanyakude District
	King Cetshwayo	King Cetshwayo District
	iLembe	iLembe District
	Harry Gwala	Harry Gwala District
Limpopo	Mopani	Mopani District
	Vhembe	Vhembe District
	Capricorn	Capricorn District
	Waterberg	Waterberg District
	Waterberg	Mogalakwena Local
	Waterberg	Modimolle-Mookgopong Local
	Waterberg	Bela-Bela Local
	Waterberg	Lephalale Local
	Waterberg	Thabazimbi Local
	Sekhukhune	Sekhukhune District
	Sekhukhune	Ephraim Mogale Local
	Sekhukhune	Makhuduthamaga Local
	Sekhukhune	Fetakgomo Tubatse Local
	Sekhukhune	Elias Motsoaledi Local
Mpumalanga	Gert Sibande	Msukaligwa Local
	Gert Sibande	Lekwa Local
	Gert Sibande	Govan Mbeki Local
	Gert Sibande	Mkhondo Local
	Gert Sibande	Chief Albert Luthuli Local
	Gert Sibande	Dipaleseng Local
	Gert Sibande	Dr Pixley Ka Isaka Seme Local
	Nkangala	Emalahleni Local
	Ehlanzeni	Ehlanzeni District
	Ehlanzeni	Nkomazi Local
	Ehlanzeni	Bushbuckridge Local
	Ehlanzeni	Thaba Chweu Local
	Ehlanzeni	City of Mbombela Local
	Northern Cape	Namakwa
Namakwa		Kamiesberg Local
Pixley ka Seme (NC)		Renosterberg Local
Z F Mgcawu		Tsantsabane Local
Frances Baard		Magareng Local
Frances Baard		Phokwane Local
Frances Baard		Frances Baard District
John Taolo Gaetsewe		Joe Morolong Local

Province	District	Name
North West	Bojanala Platinum	Madibeng Local
	Bojanala Platinum	Moses Kotane Local
	Bojanala Platinum	Bojanala Platinum District
	Ngaka Modiri Molema	Mafikeng Local
	Ngaka Modiri Molema	Ditsobotla Local
	Ngaka Modiri Molema	Ngaka Modiri Molema District
	Dr Ruth Segomotsi Mompati	Mamusa Local
	Dr Ruth Segomotsi Mompati	Lekwa-Teemane Local
Western Cape	Cape Winelands	Cape Winelands District
	Garden Route	Garden Route District
	Garden Route	Kannaland Local
	Garden Route	Bitou Local
	Garden Route	George Local
	Garden Route	Hessequa Local
	Garden Route	Knysna Local
	Garden Route	Mossel Bay Local
	Garden Route	Oudtshoorn Local

(b) 2023 – 2024 Financial Year

Province	District/ Metropolitan	Name
Eastern Cape	Nelson Mandela Bay Metropolitan	Nelson Mandela Bay Metropolitan
	OR Tambo	Ingguzu Hill Local
	OR Tambo	King Sabata Dalindyebo Local
	OR Tambo	Mhlontlo Local
	OR Tambo	Nyandeni Local
	OR Tambo	Port St Johns Local
	Alfre Nzo	Matatiele Local
	Alfre Nzo	Winnie Madikizela- Mandela Local
	Alfre Nzo	Ntabankulu Local
	Alfre Nzo	Umzimvubu Local
	Buffalo City	Buffalo City Metropolitan
	Chris Hani	Emalahleni Local
	Chris Hani	Engcobo Local
	Chris Hani	Enoch Mgijima Local
	Chris Hani	Intsika Yethu Local
	Chris Hani	Inxuba Yethemba Local
Chris Hani	Sakhisizwe Local	
Free State	Mangaung Metropolitan	Mangaung Metropolitan
	Thabo Mofutsanyana	Dihlabeng Local
	Thabo Mofutsanyana	Nketoana Local
	Thabo Mofutsanyana	Setsoto Local
	Fezile Dabi	Mafube Local
	Fezile Dabi	Moqhaka Local

	Xhariep	Letsemeng Local
	Xhariep	Mohokare Local
Gauteng	Sedibeng	Sedibeng District
	Sedibeng	Lesedi Local
	Sedibeng	Midvaal Local
	City of Johannesburg Metropolitan	City of Johannesburg Metropolitan
	City of Tshwane Metropolitan	City of Tshwane Metropolitan
KwaZulu Natal	Ethekwini Metropolitan	Ethekwini Metropolitan
	uMgungundlovu	Impendle Local
	uMgungundlovu	Mkhambathini Local
	uMgungundlovu	Msunduzi Local
	uMgungundlovu	Richmond Local
	uMgungundlovu	uMngeni Local
	uMgungundlovu	uMshwathi Local
	iLembe	KwaDukuza Local
	iLembe	Mandeni Local
	iLembe	Maphumulo Local
	iLembe	Ndwedwe Local
	Ugu	Ray Nkonyeni Local
	Ugu	Umdoni Local
	Ugu	Umuziwabantu Local
	Ugu	Umzumbe Local
	Harry Gwala	Dr Nkosazana Dlamini Zuma Local
	Harry Gwala	Greater Kokstad Local
	Harry Gwala	Ubuhlebezwe Local
	Harry Gwala	uMzimkhulu Local
	uThukela	uThukela District
	uThukela	Alfred Duma Local
	uThukela	Okhahlamba Local
	uMzinyathi	Endumeni Local
	uMzinyathi	Nquthu Local
	uMzinyathi	uMsinga Local
	uMzinyathi	Umvoti Local
	Limpopo	Mopani
Mopani		Greater Giyani Local
Mopani		Greater Letaba Local
Mopani		Greater Tzaneen Local
Mopani		Maruleng Local
Vhembe		Collins Chabane Local
Vhembe		Makhado Local
Vhembe		Musina Local
Vhembe		Thulamela Local
Northern Cape	Frances Baard	Dikgatlong Local
	Frances Baard	Sol Plaatje Local
	John Taolo Gaetsewe	John Taolo Gaetsewe District

	John Taolo Gaetsewe	Ga-Segonyana Local
	John Taolo Gaetsewe	Gamagara Local
	John Taolo Gaetsewe	Joe Morolong Local
	Namakwa	Namakwa District
	Namakwa	Hantam Local
	Namakwa	Karoo Hoogland Local
	Namakwa	Khai-Ma Local
	Namakwa	Richtersveld Local
North West	Dr Ruth Segomotsi Mompati	Dr Ruth Segomotsi Mompati District
	Dr Ruth Segomotsi Mompati	Greater Taung Local
	Dr Ruth Segomotsi Mompati	Kagisano-Molopo Local
	Dr Ruth Segomotsi Mompati	Naledi Local
	Ngaka Modiri Molema	Ramotshere Moiloa Local
	Ngaka Modiri Molema	Ratlou Local
	Ngaka Modiri Molema	Tswaing Local
Western Cape	City of Cape Town Metropolitan	City of Cape Town Metropolitan
	Central Karoo	Central Karoo District
	Central Karoo	Beaufort West Local
	Central Karoo	Laingsburg Local
	Central Karoo	Prince Albert Local
	West Coast	West Coast District
	West Coast	Bergrivier Local
	West Coast	Cederberg Local
	West Coast	Matzikama Local
	West Coast	Saldanha Bay Local
	West Coast	Swartland Local

Province	District/Metropolitan	Name
Eastern Cape	Chris Hani	Emalahleni Local
	Chris Hani	Engcobo Local
	Chris Hani	Enoch Mgijima Local
	Chris Hani	Intsika Yethu Local
	Chris Hani	Inxuba Yethemba Local
	Chris Hani	Sakhisizwe Local
	Sarah Baartman	Blue Crane Route Local
	Sarah Baartman	Kouga Local
	Sarah Baartman	Koukamma Local
	Sarah Baartman	Makana Local
	Sarah Baartman	Ndlambe Local
	Sarah Baartman	Sundays River Valley Local
Gauteng	City of Ekurhuleni Metropolitan	City of Ekurhuleni Metropolitan
	West Rand	West Rand District
	West Rand	Merafong City Local
	West Rand	Mogale City Local
	West Rand	Rand West City Local
KwaZulu Natal	Zululand	AbaQulusi Local

Province	District/Metropolitan	Name
	Zululand	eDumbe Local
	Zululand	Nongoma Local
	Zululand	Ulundi Local
	Zululand	uPhongolo Local
	Amajuba	Dannhauser Local
	Amajuba	eMadlangeni Local
	Amajuba	Newcastle Local
	uMkhanyakude	Big 5 Hlabisa Local
	uMkhanyakude	Jozini Local
	uMkhanyakude	Mtubatuba Local
	uMkhanyakude	uMhlabuyalingana Local
	King Cetshwayo	uMhlathuze Local
	King Cetshwayo	Mthonjaneni Local
	King Cetshwayo	Nkandla Local
	King Cetshwayo	uMfolozi Local
	King Cetshwayo	uMlalazi Local
Limpopo	Capricorn	Blouberg Local
	Capricorn	Lepelle-Nkumpi Local
	Capricorn	Molemole Local
	Capricorn	Polokwane Local
	Sekhukhune	Elias Motsoaledi Local
	Sekhukhune	Ephraim Mogale Local
	Sekhukhune	Makhuduthamaga Local
Mpumalanga	Nkangala	Nkangala District
	Nkangala	Dr JS Moroka Local
	Nkangala	Emakhazeni Local
	Nkangala	Steve Tshwete Local
	Nkangala	Thembisile Hani Local
	Nkangala	Victor Khanye Local
Northern Cape	Pixley Ka Seme	Pixley Ka Seme District
	Pixley Ka Seme	Emthanjeni Local
	Pixley Ka Seme	Kareeberg Local
	Pixley Ka Seme	Siyancuma Local
	Pixley Ka Seme	Siyathemba Local
	Pixley Ka Seme	Thembelihle Local
	Pixley Ka Seme	Ubuntu Local
	Pixley Ka Seme	Umsobomvu Local
	ZF Mgcawu	ZF Mgcawu District
	ZF Mgcawu	!Kheis Local
	ZF Mgcawu	Dawid Kruiper Local
	ZF Mgcawu	Kai !Garib Local
	ZF Mgcawu	Kgatelopele Local
	North West	Bojanala Platinum
Bojanala Platinum		Moretele Local

Province	District/Metropolitan	Name
	Bojanala Platinum	Rustenburg Local
	Dr Kenneth Kaunda	Dr Kenneth Kaunda District
	Dr Kenneth Kaunda	City of Matlosana Local
	Dr Kenneth Kaunda	JB Marks Local
	Dr Kenneth Kaunda	Maquassi Hills Local
Western Cape	Overberg	Overberg District
	Overberg	Cape Agulhas Local
	Overberg	Overstrand Local
	Overberg	Swellendam Local
	Overberg	Theewaterskloof Local
	Cape Winelands	Breede Valley Local
	Cape Winelands	Drakenstein Local
	Cape Winelands	Langeberg Local
	Cape Winelands	Stellenbosch Local
	Cape Winelands	Witzenberg Local

- 4.5 This will target national and provincial coordinators, municipal human resource managers, selected councillors (1 Speaker, 1 Mayor and MMC responsible for Corporate Services/ Human Resource Management), senior managers (1 Municipal Manager and 1 Director: Corporate Services/ Human Resource Management) and/ or human resource managers as illustrated below:

Target Group	Target No
CoGTA Coordinators (Provincial & National)	110
HR Managers	676 (2 per district and local municipality and up to 20 per metro)
Senior Managers	514 (2 per municipality consisting of 1 Municipal Manager and 1 Director: Corporate Services/ Human Resource Management)
Councillors	771 (3 per municipality consisting of 1 Speaker, 1 Mayor and MMC responsible for Corporate Services/ Human Resource Management)
Total	2071

NOTE: In the event that virtual training is not at all possible, face-to-face training may be explored and training venues and catering will be provided by the successful service provider, including electronic training material on USB, unless agreed otherwise.

4.6 *Content of training*

The content of training will amongst others, cover the following legislation:

- (a) The Local Government: Municipal Staff Regulations; and
- (b) The Local Government: Guidelines for Implementation of the Regulations; and
- (c) Any other relevant legislative imperatives relevant to the Regulations.

5. **Deliverables**

In light of the above, the deliverables for this project are as follows:

PROJECT PHASE	DELIVERABLES	TIMEFRAME
1.Project Inception	<ul style="list-style-type: none"> Detailed project plan adopted Service Level Agreement finalised and signed Project Governance Charter developed 	1 Months
2.Development of training material/ manuals for implementation of the Municipal Staff Regulations and Guidelines (as provided for in the scope of assignment on sub-paragraph 3.1 and 3.2 above)	<ul style="list-style-type: none"> Graphic layout of the training material for both face-to-face sessions and e-learning platforms; Layout version of the training material/ manuals; Twenty (20) copies of A5 perfect book binding training manuals; Appropriate training exercises buttressed by role plays, case studies, group discussions, etc. Trainer or facilitator's guides; Edited and proof-read training material, participants manuals and facilitator' guide with copywriting protection; Training material for HR managers/ functionaries (train the trainers), municipal executives and councillors; Quality assured training material, manuals and trainee/ facilitator' guide; A soft copy PDF with hyperlinks and optimised for website adaptable to IT systems of municipalities; A soft copy in high resolution PDF Artwork source files; Generic DL brochures printed in full colour both sides; A corporate video to be produced of 4-6 minutes; Filmed footage of DCoG staff, trainees and selected key stakeholders scripting; Integration with existing video material and DVD Full colour; Pictures - sourced by supplier approved by the DCoG; Protocols for the exercises (i.e. role plays, case studies, group discussions exercises); A PowerPoint Presentation for targeted groups for the roll-out of the Regulations and Guidelines Twenty (20) flash discs/ USBs containing electronic resource/ training material and related documents; Trainee assessment guide and evaluation forms per district; A national and provincial coordinators programme for the roll-out of training; and A district/ metro programme. 	6 Months
3.Training of trainers (DCoG PMO, Provincial Coordinators and Municipal HR Managers/ municipal executivesand	Training of DCoG PMO and Provincial Coordinators	2 months
	Training of Municipal HR Managers/ Functionaries of State of Local Government priority municipalities (65)	13 months

PROJECT PHASE	DELIVERABLES	TIMEFRAME
councillors (refer to sub-paragraph 3.3 – 3.5 for the targeted audience and municipalities)	Municipal HR Managers/ Functionaries, Municipal Managers/ HoDs: Corporate Services of 18 identified district municipalities and their locals plus 3 metros	
	Mayors and other Councillors of 18 identified district municipalities and their locals plus 2 metros	12 months
4. Skills transfer	Detailed transfer of skills and capacity building programme and skills transfer based on train the trainer	during the project period
5. Project Handover	Final report, documentation and project handover	3 month

6. Timeframes

- 6.1 The contract with the successful service provider will be for a period of thirty-six (36) months to complete.
- 6.2 The project will commence upon date of signing of the Service Level Agreement (SLA) between the DCoG and the successful bidder/ service provider. Details to be agreed upon between the DCoG and the successful bidder.
- 6.3 The implementation report (per district) must be compiled and submitted to the DCoG within **seven (7) days** of completion of training.
- 6.4 The consolidated close-out report must be submitted within **thirty (30) days** of completion of training.

7. Skills and knowledge requirements

The successful bidder should demonstrate appropriate skills and experience in the following:

- 7.1 A good understanding of the project scope supported by a well-researched methodology;
- 7.2 Proven track record and practical experience in graphic design, layout design, photo and video editing and sourcing, content editing with proven proficiency in English;
- 7.3 A minimum of five years' experience in editing, layout, design and printing voluminous documents;
- 7.4 Proof of services of a professional content and language practitioner specialising in English for the purpose of editing and proof reading;
- 7.5 A capable and experienced project team. Curriculum Vitae (CVs) must be submitted to the DCoG with the bids. The Team Leader must at least have five years' experience supported by team members with a minimum of three years' experience in editing, layout and printing industry);
- 7.6 Demonstrated ability to ensure cost effectiveness in the approach to this project;
- 7.7 Strong project management skills;
- 7.8 A good learner/ trainee management system; and
- 7.9 Registration with or accreditation from the relevant authority as a training provider.

8. Performance measurement/ reporting

To facilitate the performance of the successful service provider and monitor its scope of work, the DCoG will:

- 8.1 Enter into a Service Level Agreement (SLA) that will govern the relationship between DCoG and the service provider.
- 8.2 The SLA will include project assignments that will address each of the project deliverable.
- 8.3 Establish a Project Steering Committee to manage, monitor and oversee the project. This committee will ensure that:
- (a) Services are rendered timeously;
 - (b) Timeframes as far as possible are not extended;
 - (c) Will render a quality assurance function; and

- (d) Will ensure that additional costs are not incurred unnecessarily.
- 8.4 The service provider will be expected to table progress reports for each deliverable contained in the project/ implementation plan as agreed to and as per the SLA.
- 8.5 Monitor the payment schedule that will be attached to the SLA. Payments will therefore only be approved and processed on the basis of the achievement of deliverables as per the project/ implementation plan and related performed project activities.
- 8.6 These deliverables and related payments will be recommended by the Project Manager and approved by the Project Steering Committee.

9. Form of proposal

Bidders are requested to comply with a specific format when submitting their bids. It is suggested that the format specified in the ToR corresponds with the various elements of the bid evaluation system to facilitate the evaluation and scoring of bids, e.g.:

Functionality

- (a) Understanding of the ToR
- (b) Capacity and capability of the Service Provider
- (c) Service Provider' experience
- (d) Learning management platform
- (e) Training and skills transfer

Pricing

- (a) Rates of each team member
 - (b) Estimated number of hours to be spent by each member
 - (c) Admin costs (offices, computers, telecom, travelling, etc.)
 - (d) Any other costs (to be specified by bidder)
 - (e) Value Added Tax
 - (f) Ceiling price (all-inclusive total tender price)
- 9.1 A bidder must include a **detailed project/ implementation plan/ methodology** with the **detailed budget** reflecting all costs as per deliverable in their bid. **Failure to submit the detailed project plan and budget containing cost-breakdown according to the deliverables (as per the proposal) together with the bid will result in the bidder' bid being invalidated and rejected.**

The following information must be included in the project/ implementation plan:

- (a) Project implementation plan that indicates the following:
 - (i) Clearly defined milestones that are 100% aligned to each of the key objectives as well as each of the expected outputs/ deliverables as outlined in the scope of work.
 - (ii) Well defined timelines for each of the activities and deliverables.
 - (iii) Allocation of human resources and cost-breakdown for each of the activities and deliverables.
 - (iv) Pricing schedule.
- (b) Proposed governance arrangements to support project implementation which may include but not limited to:
 - (i) The establishment of a project steering committee.
 - (ii) The establishment of a project management team inclusive of the service provider and the DCoG team.
 - (iii) Provision of secretariat support for the governance structures that will be established.
- (c) Skills Transfer Plan developed in line with the Terms of Reference.

- (d) Previous and current similar contracts awarded to the bidder as well as client references.

Failure to include the above stated information together with the bid document on the closing date and time will invalidate the bid.

10. Bid prices

- 10.1. Bidders must express prices for their services in South African currency (Rand). All prices must be inclusive of Value Added Tax and costs to be incurred that are necessary for the execution and completion of the contract in accordance with the bid document. Prices will remain firm for the duration of the contract.

11. Bid evaluation system

11.1 All bids duly lodged will be evaluated to determine compliance with bid requirements and conditions. Bids with obvious deviations from the bid requirements/ conditions of bid and not acceptable to the evaluation committee will be eliminated from the adjudication process (i.e. will not be shortlisted). All bid proposals submitted will be evaluated in accordance with the 80/20 principle and the evaluation criteria should be as follows:

Stage 1: Compliance with minimum requirements of the bid

All bids duly lodged will be evaluated to determine compliance with requirements and conditions of the bid. All proposals that do not comply with the administrative requirements/conditions of the bid will be disqualified.

All bids that comply with the minimum requirement/conditions of the bid will be evaluated in two stages:

Stage 2: Functionality will be assessed as per Scorecard as indicated below.

Stage 3: The qualifying bidders in the Stage 2 will be evaluated further on price and BEE Contributor Level using 80/20 preference point system as prescribed in Preferential Procurement Policy Framework Act 2000, Preferential Procurement Regulations 2017 and approved CoGTA Supply Chain Management Policy 2017.

The evaluation will be done as follows:

The system comprises the following elements:

(i)	Functionality.....	100
(ii)	Price.....	80
(iii)	B-BBEE Contributor level.....	20

STAGE 2

SCORECARD FOR FUNCTIONALITY:

(a) **The following criteria will be applied for functionality to assess all the bidders who complied with minimum requirements:**

CRITERIA	SUB-CRITERIA	SCALE	WEIGHT	HIGHEST POSSIBLE SCORE
Understanding of the Terms of Reference	A detailed approach, methodology and tools on how the bidder will assist the DCoG to achieve the objectives of these ToR.	<ul style="list-style-type: none"> Restating the scope of the ToR = 1 Restating the scope of the ToR with a vague approach, methodology and plan = 2 Detailed approach, methodology, plan and tools to be used by service provider meet the scope of the work and outcomes as set out in these ToR = 3 A detailed approach, methodology, plan and tools significantly meet the requirements and outcomes as set out in the ToR. = 4 A detailed approach, methodology, plan and tools comprehensively meet the requirements and outcomes as set out in these ToR, with suggested value-add and innovation = 5 	5 x 5	25%
Capacity and capability of bidders	A demonstration of the core team (graphic designers, layout designer, content conceptualisers, content writers, language editors, e-platform setters, facilitators, trainers, IT helpdesk. etc.) and its collective experience in managing large scale projects of this magnitude.	<ul style="list-style-type: none"> Team members with 1 – 2 years' experience = 1 Team members with 3 – 4 years' experience = 2 Team members with 5 – 7 years' experience = 3 Team members with a minimum of 8 – 9 years' experience = 4 Team members with 10 or more years' experience = 5 	5X 5	25%
Bidders experience and client references	Number of years' experience the bidder has been rendering the services as contained in the ToR.	<ul style="list-style-type: none"> 1 project undertaken with 1 contactable reference but no proof of reference attached = 1 2 – 4 projects undertaken with 2 contactable references with 2 proof of references attached = 2 5 – 7 projects undertaken with 3 contactable references and 3 proof of reference attached = 3 8 – 9 projects undertaken with 4 contactable references 	5 x 4	20%

CRITERIA	SUB-CRITERIA	SCALE	WEIGHT	HIGHEST POSSIBLE SCORE
		<p>and 5 proof of references attached = 4</p> <ul style="list-style-type: none"> • 10 or more projects undertaken with 5 or more contactable references and 6 proof of references attached = 5 		
Learning Management platform	Core features of the digital training technology	<ul style="list-style-type: none"> • Trainer/ learner management system capable to integrate with two or less digital services and content platforms as outlined in the ToR = 1. • Trainer/ learner management system capable to integrate with few digital services and content platforms as outlined in the ToR = 2. • Digital learning/ training technology capable to integrate with essential digital services and content platforms as outlined in the ToR via multiple devices, including computers, laptops, phones and tablets = 3 • Digital learning/ training technology capable to integrate with more digital services and content platforms to stimulate and enhance group learning activities such as planning, scheduling, managing and measuring digital and classroom-based learning activities = 4. • Digital learning/ training technology capable to integrate with most digital services and content platforms as specified in the ToR, including ISO certification and GDPR compliant = 5 	5 x 4	20%
Approach on transfer of skills	Detailed transfer of skills and capacity building programme	<ul style="list-style-type: none"> • Commitment to skills transfer programme not submitted = 1 • Less detailed commitment to skills 	5 x 2	10%

CRITERIA	SUB-CRITERIA	SCALE	WEIGHT	HIGHEST POSSIBLE SCORE
		transfer programme submitted = 2 • Detailed approach to transfer of skills programme submitted = 3 • Detailed but exhaustive skills transfer approach submitted = 4 • Comprehensive skills transfer programme submitted = 5		
TOTAL POSSIBLE SCORE				100

Bids will be rated in respect of each criterion on a scale of 1 – 5 where 1 = Poor, 2 = Acceptable, 3 = Good, 4 Very good and 5 = Excellent. The possible score that can be achieved for functionality is 70.

b) The following formula will be utilised to convert the functionality scores:

$$\sqrt{Ps} = So/Ms \times 100 \text{ where:}$$

Ps = percentage scored for functionality by bid/proposal under consideration

S0 = total score of bid/proposal under consideration

Ms = maximum possible

(c) The average score is calculated for each bid by adding the individual scores awarded by the members of the bid evaluation committee and dividing the total by the number of the members. Bids that do not achieve the score of 70 (out of 100) for functionality will not be evaluated further and will not pass to **STAGE 3** of this Bid.

STAGE 3

EVALUATION IN TERMS OF THE 80/20 PREFERENCE POINT SYSTEM

All received bids will be evaluated in terms of the 90/10-point system as stipulated in Preferential Procurement Regulations, 2017. 80 points will be allocated for price and 20 points for attaining the B-BBEE status level of contributor.

Points for price will be calculated only for shortlisted bidder/s as follows:

80/20

$$Ps = 80 \left(1 - \frac{Pt - P \text{ min}}{P \text{ min}} \right)$$

Where

Ps = Points scored for competitive price of bid or offer under consideration

Pt = Competitive price of bid or offer under consideration; and

Pmin = Competitive price of lowest acceptable bid or offer

The maximum possible score that can be achieved for price is 80 points.

NB: Bidders are required to, together with their bids submit original and valid B-BBEE status level verification certificates or certified copies to substantiate their B-BBEE rating claims. A bid will not be disqualified from the bidding process if the bidder does not submit a certificate substantiating the B-BBEE status level of contribution nor is a non-compliant contributor. Such a bidder will score zero out of maximum of 20 points for B-BBEE.

B-BBEE Status Level of Contributor	Number of points (90/10 system)
1	10
2	9
3	8
4	5
5	4
6	3
7	2
Non-compliant contributor	0

Note: No preference will be awarded without submission of a valid B-BBEE certificate.

The total points (out of 100) for the various bidders will be calculated by adding the points for price (out of 80) and the points for BBBEE Contributor Level (out of 20).

12. Awarding of bid

The bid will be awarded to the bidder who scored the highest total number of points as prescribed in the PPPFA, SCM Policy of 2017 and Preferential Procurement Regulations of 2017.

In exceptional cases the bid may, on reasonable and justifiable grounds, be awarded to a bidder that did not score the highest number of points. Reasons for such decision must be approved and recorded for audit purposes and must be justifiable in the court of law (as prescribed on the Preferential Procurement Regulations 2017).

(a) Joint Ventures, Consortiums and Trusts:

A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. DCoG will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

(b) **Sub-contracting:**

Bidders/ tenderers who want to claim Preference points will have to comply fully with regulations 11(8) and 11(9) of the PPPFA Act with regard to sub-contracting.

The following is an extract from the PPPFA Act:

- (i) "A person must not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub- contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract."
- (ii) "A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract."

IN EVALUATING THE TECHNICAL INFORMATION CONTAINED IN THE BID, THE EVALUATION COMMITTEE WILL BE GUIDED BY THE FOLLOWING:

- (a) **Bidder's understanding of the brief** – The bid provides a clear indication that the bidder fully understands the purpose and scope of the work and the bidder's own roles and functions in this regard. (Methodology)
- (b) **Capability and experience** – The bid provides a clear indication that the bidder's team comprises people with the necessary qualifications, experience, skills, knowledge and required to ensure the efficient and effective generation of the required deliverables to the highest standards of quality.
- (c) **Track Record** – The bid provides clear information on previous, relevant projects that confirm that the bidder has the required experience and success track record in the area of general project management and management related projects.

13. Briefing session and presentations by shortlisted bidders

A non-compulsory briefing session will be held as **stated on the cover page of the bid document**. Bids from companies/organisations that did not attend the briefing session may not be disqualified.

14. Enquiries

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| <p>(a) <i>Terms of Reference</i>
Mr JM Maepa
Telephone: 012 334 4915

E-mail: JackeyM@cogta.gov.za</p> | <p>(b) <i>Tender documents</i>
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e-mail: SindisiweM@cogta.gov.za</p> |
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