



INVITATION TO BID

Bid Number	AFESIS032024
Opening time and date	12h00, 14 March 2024
Closing time and date	12h00, 28 March 2024
Description of Service	The review and enhancement of existing training manuals and the rollout of training on local governance with emphasis on strengthening capacity for social accountability
Email (Technical and Financial Quotation)	tenders@afesis.org.za

REQUEST FOR QUOTATION

AFESIS intends to engage suitably qualified and competent service providers to review its local government training manuals, and to roll out a training of trainers, as part of its Kagisano programme. Kagisano is a programme implemented by AFESIS and its partners across 16 sites located in six Provinces in South Africa. The Programme seeks to strengthen the resilience of the sixteen partner communities by supporting efforts aimed at building social cohesion and community-initiated violence prevention.

Afesis invites service providers with experience in local government-specific training and those with demonstrable skill and experience in training material development to respond to this call.

Bids will be selected based on a price-quality criteria explained in detail in the description of the evaluation criteria attached herein.

This Request for Quotation (RFQ) is in two parts. The first section presents instructions to Service Providers (Section I), while the second part (Section II) presents the Terms of Reference (ToR) for this assignment.

Interested parties should submit bids in English to tenders@afesis.org.za on or before **28 March 2024**. A bid comprises of both the Technical Quotation as well as a Financial Quotation.

For clarity-seeking questions only, contact Ms. Nontobeko Gcabashe at nontobeko@afesis.org.za or 043 743 3830. No questions will be entertained once the closing date for submission of Bids passes.

AFESIS reserves the right to accept or reject any quotation and to annul the selection process at any time before contract awarding, without thereby incurring any liability to affected service providers.

SECTION 1: INSTRUCTION TO SERVICE PROVIDERS

1. INTRODUCTION

- 1.1 Eligible Service Providers may submit a Technical Quotation as well as a Financial Quotation in response to this Bid
- 1.2 The Bid number [**AFESIS032024**] must be displayed clearly on the cover page of both the Technical and Financial Quotation
- 1.3 The contact details of the representative(s) of the Service Provider must be clearly displayed on the cover page of both the Technical and Financial Quotation
- 1.4 The Technical Quotation shall be the basis for contract negotiations and ultimately for a signed contract with the successful Service Provider
- 1.5 The Service Providers' costs of preparing the quotation and of negotiating the contract, including visit/s to AFESIS, are not reimbursable as a direct cost of the assignment
- 1.6 Service Providers shall not engage in any other assignment(s) that would be in conflict with their prior or current obligations to other procuring entities, or that may place them in a position of not being able to carry out the assignment in the best interest of the AFESIS
- 1.7 AFESIS is not bound to accept any quotation and reserves the right to annul the selection process at any time prior to contract award, without thereby incurring any liability to the Service Providers.

2. CORRUPT, FRAUDULENT, AND COERCIVE PRACTICES

- 2.1 AFESIS' Policy requires that all AFESIS staff, bidders, manufacturers, suppliers, or distributors, observe the highest standard of ethics during the procurement and execution of all contracts
- 2.2 AFESIS shall reject any quotation put forward by bidders, or where applicable, terminate their contract if it is determined that they have engaged in corrupt, fraudulent, collusive, or coercive practices
- 2.3 For purposes of this bid, AFESIS offers the following working definitions for the prohibited activities mentioned in paragraph 2.2:
 - Corrupt practice means the offering, giving, receiving, or soliciting, directly or indirectly, of anything of value to influence the action of the Procuring/Contracting Entity in the procurement process or contract execution;
 - Fraudulent practice is any act or omission, including a misrepresentation, that knowingly or recklessly misleads, or attempts to mislead, the Procuring/Contracting

Entity in the procurement process or the execution of a contract, to obtain a financial gain or other benefit to avoid an obligation;

- Collusive practice is an undisclosed arrangement between two or more bidders designed to artificially alter the results of the tender procedure to obtain a financial gain or other benefit;
- Coercive practice is impairing or harming, or threatening to impair or harm, directly or indirectly, any participant in the tender process to influence improperly its activities in a procurement process or affect the execution of a contract.

3. CONFLICT OF INTEREST

3.1 All bidders found to have conflicting interests shall be disqualified to participate in the procurement at hand. A bidder may be considered to have conflicting interests under any of the circumstances set forth below:

- A Bidder has controlling shareholders in common with another Bidder;
- A Bidder receives or has received any direct or indirect subsidy from another Bidder;
- A Bidder has the same representative as that of another Bidder for purposes of this bid;
- A Bidder has a relationship, directly or through third parties, that puts them in a position to have access to information about or influence on the Bid of another or influence the decisions of the Mission/Procuring Entity regarding this bidding process;
- A Bidder submits more than one bid in this bidding process;
- A Bidder who participated as a consultant or service provider in the preparation of the design or technical specifications of the Goods and related services that are subject of the bid.

4. CLARIFICATIONS AND AMENDMENTS TO RFQ DOCUMENT

4.1 At any time before the submission of the bids, AFESIS may, for any reason, whether at its own initiative or in response to a clarification question, amend the RFQ.

4.2 Amendments to the RFQ will be done in a manner that will not jeopardise or prejudice any of the interested Service Providers.

4.3 Service Providers may request for clarification(s) on any part of the RFQ. The request must be sent in writing or by standard electronic means to AFESIS through the email address indicated in the invitation to this bid, at least three (3) calendar days before the set deadline for the submission and receipt of bids. AFESIS will respond in writing or by standard electronic means to the said query.

4.4 All correspondence exchanged by the Service Providers and AFESIS, shall be in English.

5. PREPARATION OF THE QUOTATION

5.1 A bid shall comprise of two (2) components:

- a) the Technical Quotation; and
- b) the Financial Quotation.

5.2 Both the Technical Quotation and the Financial Quotation shall be presented in English and clearly.

5.3 AFESIS shall deem the Technical Quotation and the Financial Quotation as one bid.

5.4 Service Providers are expected to submit only one bid in response to this RFQ.

5.5 Service Providers are expected to examine in detail, the instructions contained in this Request for Quotation (RFQ). Failure to provide the information requested or inability to respond adequately to the Terms of Reference may result in the rejection of a bid.

6. THE TECHNICAL QUOTATION

6.1 When preparing the Technical Quotation, Service Providers must give particular attention to the following:

- a) **Innovative approach and value-addition:** the Service Provider must present an approach to material development and training delivery that is innovative, adds value and is responsive to AFESIS' needs and that of its intended beneficiaries. Strengthening social accountability is at the core of what AFESIS seeks to achieve with the local government training; Service Providers must demonstrate understanding and experience in building capacity for social accountability.
- b) **Relevant experience:** the Service Provider must have relevant experience and expertise for the assignment. A Service Provider may obtain a full range of expertise by associating with individuals, consultant(s) and/or other entities in a joint venture or sub-consultancy. The cumulative experience of entities within a joint venture is that which will be evaluated as the overall experience of the Service Provider in evaluating the bid. To demonstrate relevant experience, Service Providers must provide a list of past services, the value of such contracts and contactable references.
- c) **Suitably skilled personnel:** the Service Provider must have skilled persons reviewing the training material. By skilled persons AFESIS is looking for technical expertise in the local government sector but also in the technical design and development of training materials. The Service Provider must also demonstrate that it will have adequate capacity to roll out the training. To demonstrate skill and capacity, the Service Provider must provide CVs of

key personnel that will work on the assignment. Service Providers are to disclose to AFESIS in writing any changes to the key personnel during the tender evaluation and awarding stages. Failure to declare such changes timeously may result in the re-evaluation or the disqualification of the Bid.

- d) **Good standing:** AFESIS seeks to appoint companies who meet the basic statutory requirements for business activities of the nature and services for which this bid is intended. As such, the Service Provider must provide proof of company registration, valid TAX clearance certificates, SETA accreditation, confirmation of a valid B-BBEE status and any other certification as may be relevant to this assignment.
- e) **Diversity and inclusion:** Greater weighting will be given to Service Providers with majority shares held by previously disadvantaged persons. Service providers are to present the makeup of their shareholder and/or management structure in their Technical Quotation. Priority will be given to women, youth, black owned businesses and people living with disability. Service Providers must present their diversity profile and or any other information that may assist AFESIS in its evaluation of the bid.
- f) **Nationality rule:** This bid is open to all persons and/or entities who are nationals of or legal persons in South Africa. To satisfy the nationality rule, Service Providers must submit with the Technical Quotation copies of their identity documents or any other proof of identification of the key personnel that will work on this bid.
- g) A detailed activity plan must be submitted, as an attachment, to the Technical Quotation.
- h) The narrative part of the Technical Quotations may not be longer than 5 pages (excluding the attachments).

7. THE FINANCIAL QUOTATION

- 7.1 In preparing the Financial Quotation, Service Providers are expected to take into account the requirements and conditions outlined in the RFQ as well as the proposed implementation approach presented in the Technical Quotation.
- 7.2 In presenting the cost structure, Service Providers must separate the training material review component of the work from the training roll out component.
- 7.3 The budget must align with the activity plan submitted with the Technical Quotation
- 7.4 The price for the services proposed shall be presented in South African Rand – ZAR.
- 7.5 Service Providers must provide guarantee for the Financial Quotation of at least 30 calendar days. During this period, the Service Provider is expected to keep available the professional staff for the assignment. AFESIS will make its best effort to complete negotiations and determine the award within the validity period.

7.6 The Financial Quotation shall not be longer than 2 pages

8. SUBMISSION, RECEIPT, AND OPENING OF QUOTATIONS

8.1 Service Providers may only submit one bid.

8.2 A bid consists of a Technical Quotation and a Financial Quotation along with all relevant attachments as per the RFQ.

8.3 If a Service Provider submits or participates in more than one bid, all bids for which such a Service Provider is a part, shall be disqualified.

8.4 Bids are to be neatly typed and submitted electronically however, handwritten bids will not be disqualified. Should a service provider submit a handwritten bid, such a bid (both the Technical and Financial Quotations) must be prepared in indelible ink. It shall contain no overwriting, except as necessary to correct errors made by the Service Providers themselves. Any such corrections or overwriting must be initialled by the person(s) who signed the Quotation.

8.5 The Service Provider(s) shall submit one bid via email with the words "**TECHNICAL AND FINANCIAL QUOTATION – AFESIS032024**" in the subject line.

8.6 Both the Technical and Financial Quotation shall be clearly marked on the cover page with the words " TECHNICAL OR FINANCIAL QUOTATION" respectively. Furthermore, the reference code for this Bid shall be clearly displayed on the cover page i.e. **TECHNICAL/FINANCIAL QUOTATION and AFESIS032024**"

8.7 Quotations must be received by AFESIS on or before **12H00 on 28 MARCH 2024**. Any Quotation submitted by the Service Provider after the deadline for receipt of Quotations prescribed by AFESIS shall be declared "Late," and shall not be accepted by the AFESIS.

9. EVALUATION OF QUOTATIONS

9.1 A two-step evaluation process will be utilised in evaluating the bids. The Technical Quotations will be evaluated first against the terms of reference.

9.2 An 80/20 rule will be used in the evaluation of the bids where the Technical Quotation weights 80% and the Financial Quotation weighs 20% of the total bid score (T = the weight given to the Technical Quotation = 0.80; F = the weight given to the Financial Quotation = 0.20)

9.3 THE EVALUATION OF THE TECHNICAL QUOTATION

9.3.1 The Technical Quotations will be evaluated based on the following criteria:

- a) Relevant experience of the Service Providers or key personnel therein [30%]
- b) Adequacy of proposed methodology (including value addition) and realistic work plan [35%]
- c) Capacity to implement (staff competence) the assignment [30%]
- d) Diversity profile of the Service Provider [5%]

9.3.2 The diversity score shall be allocated as follows:

- Youth = 2%
- Women = 1%
- Black owned (majority shares) = 1%
- Disability = 1%

9.3.3 The Overall Technical Qualifying Score (St) of the bids is 100% [9.3.1 (a) + (b) + (c) + (d)]

9.3.4 A Bid shall be rejected at this stage if it does not respond to important aspects of the TOR or if it fails to achieve the minimum Technical Qualifying Score (St) of at least 70%.

9.3.5 All Bids that meet the minimum Technical Qualifying Score (St) of 70% and more shall move to the second step in the evaluation process where the Financial Quotation is evaluated.

9.4 THE EVALUATION OF THE FINANCIAL QUOTATION

9.4.1 The lowest Financial Quotation (FI) amongst those that had achieved St of over 70% is determined.

9.4.2 Using this lowest Financial Quotation (FI), the Financial Score (Sf) of each Bid is determined using the following formulae:

$$Sf = 100 \times FI / F$$

Where:

Sf - is the financial score of the Financial Quotation under consideration,
 FI - is the price of the lowest Financial Quotation, and
 F - is the price of the Financial Quotation under consideration

9.4.3 The Bids shall then be ranked according to their combined technical and financial scores using the weights (T = the weight given to the Technical Quotation = 0.80; F = the weight given to the Financial Quotation = 0.20; T + F = 1)

Sc = Combined score of a bid (combining the technical and financial scores)

St = technical score achieved

Sf = financial score achieved

$$Sc = St \times T\% + Sf \times F\%$$

9.4.4 After the Bids have been submitted and during the evaluation period, Service Providers that have submitted their Bids are prohibited from making any kind of communication with any staff member at AFESIS. Any effort by the Service Providers to influence AFESIS in the examination, evaluation, ranking of Bids, and recommendation for the award of contract may result in the rejection of the Service Provider's Bid.

9.4.5 AFESIS will correct any computational errors. In case of a discrepancy between a partial amount and the total amount, or between words and figures, the former will prevail. In addition, activities and items described in the Technical quotation but not priced shall be assumed to be included in the prices of other activities or items.

9.5 The Service Provider achieving the highest combined technical and financial score will be invited for contract negotiations.

10 AWARD OF CONTRACT

10.4 The contract shall be awarded, through a notice of award, following negotiations and subsequent post-qualification due-diligence processes, to the Service Provider with the **highest combined technical and financial score**.

10.5 AFESIS shall notify other Service Providers on the shortlist of the outcome of their bid only once a contract has been signed with the successful bidder.

10.6 The successful Service Provider is expected to commence the assignment on 5 April 2024.

11 CONFIDENTIALITY

11.4 Information relating to the evaluation of bids and recommendations concerning awards shall not be disclosed to any other Service Provider nor to other persons not officially concerned with the process.

11.5 The undue use by any Service Provider of confidential information related to the process may result in the rejection of its bid and may be subject to the provisions of AFESIS's anti-fraud and corruption policy.

SECTION II: TERMS OF REFERENCE

Title: The review and enhancement of training manuals and the rollout of training on local governance with emphasis on strengthening capacity for social accountability

Location: South Africa

Duration: Six (6) weeks

Start Date: 5 April 2024

End Date: 17 May 2024

Reference: AFESIS032024

Closing Date: 28 March 2024

THE ORGANISATION, BACKGROUND AND CONTEXT

AFESIS is a non-government organisation (NGO) with head offices in East London, South Africa, whose work is aimed at strengthening local governance, participatory democracy, and basic service delivery. AFESIS has been in existence for 40 years and has over that time, contributed significantly to shaping policy and practice on urban development, housing, strengthening agency and local governance.

AFESIS is, amongst other things, implementing a programme aimed at strengthening social cohesion and preventing collective violence across sixteen communities located in six provinces. The sixteen communities are some of those where there had been incidences of collective violence in the past and where social cohesion had been identified to be weak. The sixteen communities where the programme (named Kagisano) is implemented are characterized by high density levels, low-income households, poor service delivery, high inward and outward mobility, high levels of violent crime and a rapidly growing informal economic sector. The Kagisano programme seeks to, amongst other things, strengthen the capacity of citizens and leaders in the sixteen communities to engage local government towards improved service delivery. Kagisano seeks to strengthen social accountability and local governance by mobilizing community members to effectively advocate for and participate in service delivery.

Towards the goal noted above, AFESIS seeks to revise its existing training manuals on local governance and to align them with existing legislative and policy changes, and the realities of political changes and culture shifts that impact decision-making processes in local government. AFESIS is concerned with imparting technical skills for budget analysis, social

auditing, petitioning, etc. whilst also strengthening the oversight architecture in local government.

AFESIS seeks to engage the same service provider to train its facilitators on the revised training manual in a training-of-trainers intervention that should see the facilitators ready to roll out the training in the communities where they are working.

SCOPE OF WORK

AFESIS seeks to appoint a suitably skilled Service Provider to review its existing training manuals on local governance and to roll out local government training. In summary, the scope of work is as follows:

- a. Revise exiting training manuals
- b. Design and deliver Local Governance training to Kagisano facilitators
- c. Support Kagisano facilitators in the roll out of the Local Governance training across the sixteen sites

EXPECTED OUTCOMES

It is expected that the training interventions will achieve the following results:

- Equip community members in the sixteen communities with requisite skills to meaningfully engage local government on service delivery;
- Equip community members in the sixteen communities with skills and capacity to access and analyze technical information such as budgets, project plans, municipal reports, to inform advocacy, strategy and decision-making;
- Empower Kagisano facilitators with skills to confidently roll out the training to others;
- Rally community members together in pursuit of a common agenda; and
- Provide meaningful tools for action

DELIVERABLES

The Service Provider is expected to deliver the following:

- A training manual
- A draft design of a training programme (with presentations and other visual materials as deemed necessary)
- A close out report with participant evaluation of the training intervention

SERVICE PROVIDER EXPERIENCE

The Service Provider must:

- Demonstrated experience and skill in the development of training manuals;
- Demonstrate experience in Local Governance;
- Demonstrated experience in the design of training interventions and training facilitation; and
- Demonstrated experience in mentoring, supporting, and coaching others in the delivery of specific outputs.

THE TENDER PROCESS

Interested Service Providers must submit the following:

1. A Technical Quotation (maximum 5 pages) outlining the approach, theoretical framework and element of innovation. The technical quotation must demonstrate an understanding of the subject matter, experience and competence, as well as an activity plan demonstrating an intent to achieve the desired outputs within set timeframes.
2. Additional information that must be submitted with the Technical Quotation include:
 - a. Details of past relevant experience and references
 - b. CVs of key persons who will work on the assignment
 - c. Proof of identity of key personnel
 - d. A detailed activity plan
 - e. Proof of company registration
 - f. Proof of compliance with SARS
 - g. SETA accreditation as a Training Service Provider
3. A Financial Quotation (maximum 2 pages) presenting the costing structure for the assignment.

Interested parties should submit applications in English to tenders@afesis.org.za on or before **12h00 on 28 March 2024**.

For clarity-seeking questions only, contact Ms. Nontobeko Gcabashe at nontobeko@afesis.org.za or 043 743 3830.