

TERMS OF REFERENCE

FOR THE PROVISION OF TECHNICAL ASSISTANCE SERVICES TO THE LIMPOPO DEPARTMENT OF PUBLIC WORKS, ROADS AND INFRASTRUCTURE (LDPWR&I): INFRASTRUCTURE DELIVERY SUPPORT PROGRAMME

(PN 1046)

1 X INFRASTRUCTURE EXPERT

BACKGROUND INFORMATION

Programme Identification

Name of Client	Department of Public Works, Roads and Infrastructure (LDPWR&I)
Name of Project	Infrastructure Delivery Support to Limpopo Department of Public Works, Roads and Infrastructure (LDPWR&I)
Contracting Authority	Government Technical Advisory Centre (GTAC)
Accountable Officer	Lindiwe Ndlela Acting Head Government Technical Advisory Centre (GTAC)
Budget Manager	Emmanuelle Gille Chief Director: Institutional Development Support (IDS) Government Technical Advisory Centre (GTAC)
Project Purpose	The purpose is to provide LDPWR&I with requisite organisational, management and technical capacity building to perform its role as the custodian of infrastructure and preferred implementing agent according to the adopted Limpopo Infrastructure Delivery Management System (LIDMS).

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1 BACKGROUND INFORMATION

1.1 Introduction

Limpopo Department of Public Works, Roads and Infrastructure (LDPWR&I) is critical to the delivery of infrastructure both at a provincial and local government. In this regard, LDPWR&I is the custodian of provincial infrastructure and the preferred implementing agent according to the adopted Limpopo Infrastructure Delivery Management System (LIDMS). However, there are capacity challenges in LDPWR&I to perform this role.

As part of GTAC programme of support to Limpopo Provincial Treasury, LDPWR&I received support under Limpopo Provincial Treasury Infrastructure Support Programme (LPT ISP) Phase 1 which focused on supporting provincial departments. The support provided to LDPWR&I was in terms of operationalisation of the LDPWR&I Infrastructure Hub with the objectives of aligning provincial initiatives; leveraging and maximising existing resources in the province; and enhancing the performance of the Infrastructure Hub. Additional support was requested for LDPWR&I through the Infrastructure Technical Management Committee (ITMC) which is the provincial governance structure for infrastructure. A rapid diagnostic including engagements between the LPT and LDPWR&I confirmed the following programme outputs of support:

- Output 1: Programme Management and Governance
- Output 2: Service Delivery Model and Strategy
- Output 3: Business Processes Mapping and Institutionalisation
- Output 4: Organisational Development
- Output 5: Change Management
- Output 6: Improved ICT systems
- Output 7: Capacity Building on the Infrastructure Delivery Management System (IDMS), Framework for Infrastructure Delivery and Procurement Management including Programme Management, Project Management and Contract Management
- Output 8: Establishment of the PMU

A technical support team with expertise in the following areas would be required to provide support on all the above outputs:

- Infrastructure Delivery Management Systems, Contract Management, and Programme and Project Management;
- Organization Design and Development;
- Supply Chain Management;
- Public Financial Management;
- Leadership Support and Change Management
- Business Process Mapping and Re-engineering; and
- ICT Systems Operations and Implementation.

However, in the context of Covid19 and associated budget constrained, the department has decided to only appoint experts for the following areas: Organisation Development, Change Management, Infrastructure Delivery and Procurement Management, and Information Technology. The following should be noted:

- These Terms of References (ToR) are specifically for the Infrastructure Expert who are being procured through this open Bid.
- The Information Technology Expert will also be procured through an open bid process, under a separate ToR.
- The Organisation Development and Change Management Experts are being procured using the GTAC Panel.

1.2 Current State of Affairs

GTAC has already initiated the Infrastructure Delivery Support programme with GTAC Long-Term Advisors (LTAs) supporting the following Outputs 1,2, 3, 4, and 7. The programme has been running since April 2020 and progress has been made in the following areas:

- Output 3: All the technical business processes have been mapped and awaiting approval before enhancement and institutionalisation. The business processes for the rest of the organisation are yet to be mapped.
- Output 4: There is a proposed structure currently under consideration and consultations with all the relevant stakeholders.
- Output 7: An Infrastructure Progression Model (IPM) has been used to conduct capacity assessment which has informed the capacity building plan which is currently being implemented.

In addition, GTAC has supported LPT to unblock and accelerate infrastructure delivery; and build capacity both at provincial and local government through programmatic support. Phases 1 of the programme, which is support to Provincial Departments, was successfully closed in December 2019. Phase 2, which is support to local government, is closing end of March 2021. At a high level, the objectives of the overall GTAC programme of support include:

- Improved service delivery in terms of timely, fit for purpose, and accelerated infrastructure delivery and spend;
- Improved provincial and local government capacity to manage and deliver infrastructure regarding appropriate skills, systems, processes and procedures; and
- Economic development and job creation

Both programmes were conceptualised to have the following Outputs:

- Output 1: Programme and project management; and governance
- Output 2: Accelerated infrastructure delivery
- Output 3: Planning and budget alignment
- Output 4: Institutional Arrangements
- Output 5: Public finance management practices
- Output 6: An Integrated provincial-wide system for infrastructure delivery
- Output 7: Organization development and change management
- Output 8: Capacity Building

1.3 Project Beneficiaries

This is a strategic project that will benefit the entire province (both provincial and local government) given the role of LDPWR&I regarding infrastructure delivery.

1.4. Request for assistance

LPT sent a request for assistance from GTAC to help unblock infrastructure delivery at the provincial and local level for selected provincial departments and municipalities; and provincial property/facility rationalisation. Support to LDPWR&I is part of the requested support.

2 OBJECTIVES OF THE SERVICES TO BE PROVIDED

2.1 General Objective

The overall objectives of the services are to provide 1 x Infrastructure Expert to support LDPWR&I with the requisite management and technical capacity building to perform its role as the custodian of infrastructure and preferred implementing agent according to the adopted LIDMS.

Team Member	Role on the Project	Required Involvement	
		Estimated Duration	Level of Effort
1 X Immovable Asset Management Expert – Infrastructure related/perspective	Infrastructure Strategy Development Review and establishment of the Asset Management Function Development a credible Immovable Asset Register Review and establishment of the Infrastructure Procurement Management Function Support the application and implementation of IDMS and FIDPM Capacity Building	20 Months	Approximately 20 days per month

2.2 Specific Objectives

The specific objectives are described below:

- Familiarise and understand the departmental mandate and service delivery model;
- Develop an infrastructure strategy;
- Support the compilation of credible Immovable Asset Register (IAR) and compliance with the requirements of applicable legislation, e.g., Government Immovable Asset Management Act (GIAMA), Public Finance Management Act (PFMA), etc.;
- Enhancement and development of SCM policies for infrastructure, processes and systems in compliance with the IDMS and FIDPM

- Alignment of internal business and service delivery processes with the IDMS and Framework for Infrastructure Delivery and Procurement Management (FIDPM) as implemented by government;
- Familiarise and enhance technical business process maps including development of Standard Operating Procedures (SOPs);
- Institutionalisation of technical business processes;
- Develop a Work Plan for the implementation of the interventions related to the development of a credible IAR, and SCM policies, processes and systems and compliance with the IDMS and FIDPM;
- Review available reports and documents developed for other provincial initiatives including LPT ISP and LIMP to ensure alignment;
- Work with the Departmental Counterpart, GTAC LTAs to ensure alignment and integration of all Outputs; and
- Development of capacity within the Department.

3 Scope of Work

The main tasks to be performed are as follows:

- Provide leadership support and coaching especially around decision making with regarding to infrastructure asset management and SCM;
- Assess the current mandate, service delivery model/s and strategies of the Department to ensure a proper understanding of the delivery context, and more specifically the infrastructure delivery and asset management context;
- Assess the functional performance of immovable assets as per the User Asset Management Plan (U-AMP);
- Review the current IAR, quality of information captured in PROMAN and identify shortcomings;
- Advise the Department on best practice regarding asset life cycle management, enhancement of the IAR and assist in developing the appropriate processes to deliver a credible IAR, inclusive of undertaking condition assessments of the relevant immovable assets in order to improve the quality of the IAR;
- Guide the Departmental officials in asset life cycle management and the process of developing a credible IAR and subscribing to the prescripts of applicable legislation, e.g., the GIAMA, PFMA, etc.;
- Familiarise, understand the technical business processes, support the enhancement of the business processes, and implement and institutionalise them through training and skills transfer;
- Advise and assist the Department on the development and implementation of best practices and approaches regarding SCM policies and process associated with the procurement of infrastructure, IDMS, and FIDPM with special reference to the constitution of respective committees, e.g., Bid Specification, Evaluation, and Adjudication from a technical perspective and institutionalization of such practices;
- Guide the Departmental officials in the development and implementation of SCM policies for infrastructure, processes and compliance measures associated with the procurement of infrastructure as prescribed by the FIDPM;
- Develop a Work Plan to guide the supply chain management activities to be undertaken and report on progress as per the GTAC guidelines;
- Report on progress as per the governance arrangements for the project; and
- Capacitate officials through training, coaching and mentoring.

4 Deliverables and Outcomes

4.1 Deliverables

Outputs will include the following:

- Inception report;
- Infrastructure delivery reports and deliverables according to IDMS and FIDPM including Asset management and maintenance policies and guidelines, and SCM policies and guidelines;
- Credible asset register;
- Enhance technical business processes
- Work Plan;
- Deliverables as per the Work Plan;
- Monthly timesheets and reports; and
- Close-out report

4.2 Outcomes

Outcomes are as follows:

- A credible Immovable Asset Register for immovable assets;
- Improved asset management function including maintenance;
- Supply Chain Management policies and processes in compliance with the mandate and service delivery model/s of the Department, the IDMS and the FIDPM directed at improved infrastructure delivery;
- Improved infrastructure planning;
- Improved capacity to deliver infrastructure in the department; and
- Improved expenditure.

5 Required Expertise

1 x Infrastructure Expert is required with expertise in Asset Management Expert and SCM. The Expert is required to have skills and expertise in the following areas:

- Expertise and experience in asset management in the government/public sector;
- Expert knowledge of infrastructure asset management theory, best practice, strategies, frameworks, approaches, etc. applicable to the government/public sector;
- Expert knowledge of the IDMS and FIDPM;
- Undertaking condition assessments of immovable assets;
- Development of an IAR and alignment with the U-AMP/C-AMP;
- Expert knowledge of applicable legislation, guidelines and prescripts and specifically GIAMA and SCM;
- Expertise and experience in supply chain management in the government/public sector;
- Expert knowledge of supply chain management theory, best practice, strategies, frameworks, approaches, etc. applicable to the government/public sector
- Programme and project planning, implementation and management;
- Business Process Mapping skills;
- Team building experience;
- Good communication and facilitation skills;
- Maturity in interpersonal relationships and the ability to work well within a team;

- Strategic management;
- Stakeholder management;
- Scoping, diagnostic and situationally analysis; and
- Capacity building.

The Infrastructure Expert should have a Degree in the Built Environment (Engineering, Building Science, Property Management or Planning) and at least ten (10) years management experience at senior level in the South African government and/or consulting for the public sector.

6 Selection and Evaluation Criteria

6.1 Evaluation

The evaluation criteria to be utilised will be based on the following:

Technical proposal Criteria:

a) Approach and methodology in managing this project	50
b) Relevant Qualifications	20
c) Relevant experience	20
d) Similar Projects Completed	10
Total Score	100
Total Technical Threshold	70

The technical proposal minimum evaluation score is 70 as indicated above.

The below matrix will be used in scoring the proposals:

The below matrix will be used in scoring the proposals: Description of Quality Criteria and Sub-criteria	Scoring	Weight
Total Functionality	Total Score	100%
A. Approach and methodology in managing this project which should include:		
Interpretation of Terms of Reference to demonstrate the service providers understanding of what is required, Approach and methodology to address the objectives, Workplan including key milestones and timelines, Monitoring and evaluation system for the project.		
5. Excellent understanding of what is required in the terms of reference; innovative and practical approach and methodology; proposed action plan including milestones and timeframes; and a project monitoring and evaluation mechanism	5 = Excellent	50%
4. Good understanding of what is required in the terms of reference; practical approach and methodology; proposed action plan including milestones and timeframes; and a project monitoring and evaluation mechanism	4 = Good	
3. Satisfactory (or repeat of ToRs) understanding of what is required in the terms of reference; generic or text book approach and methodology; proposed action plan including milestones and timeframes; and a project monitoring and evaluation mechanism	3 = Satisfactory	
2. Poor understanding (wrong interpretation) of what is required in the terms of reference and missing one of the of the following critical components: approach and methodology; action plan; and project monitoring and evaluation mechanism	2 = Poor	
1. No Technical Proposal submitted or Technical Proposal submitted without any of the following critical components: approach and	1 = Not Acceptable	

The below matrix will be used in scoring the proposals: Description of Quality Criteria and Sub-criteria	Scoring	Weight
Total Functionality	Total Score	100%
methodology; action plan; and project monitoring and evaluation mechanism		
B. Relevant Qualifications		
Relevant qualifications in the following areas: Architecture, Engineering, Quantity Surveying/Building Science and Planning (Country and Urban Planning):		
NQF Levels 8, 9&10: Honours, Master's Degree & PHD Qualification	5 = Excellent	20%
NQF Levels 7: Degree/BTech	4 = Good	
NQF Level 6: Diploma	3 = Satisfactory	
NQF Level 5: Higher Certificate	2 = Poor	
NSC: Matric	1 = Not Acceptable	
C. Relevant experience		
For professional/s to be involved in the assignment, the following criteria will apply:		20%
<ul style="list-style-type: none"> • Asset management and Maintenance • Programme/project planning, implementation and management • Procurement, contract and financial management • IDMS and FIDPM • Infrastructure delivery management in RSA Public Sector • Knowledge of GIAMA and other applicable legislation • Knowledge on local and provincial government practices and legislation • Capacity building, coaching and facilitation • Strategic management • Stakeholder engagement and management • Scoping, diagnostic and situational analysis • Supply chain management of infrastructure in the government/public sector; • Supply chain management of infrastructure theory, best practice, strategies, frameworks, approaches, etc. applicable to the government/public sector; 		
13 years or more relevant experience	5 = Excellent	
10 to 12 years' relevant experience	4 = Good	
7 to 9 years' relevant experience	3 = Satisfactory	
4 to 6 years' experience	2 = Poor	
1 to 3 year experience	1 = Not Acceptable	
D. Similar Projects Completed		
Number of Completed Similar Projects, please complete attached Template:		10%
5 or More Completed Similar Projects	5 = Excellent	
4 Completed Similar Projects	4 = Good	
3 Completed Similar Projects	3 = Satisfactory	
2 Completed Similar Projects	2 = Poor	
1 Completed Similar Projects	1 = Not Acceptable	

6.2 Minimum score for Technical Evaluation

The proposal must attain the minimum score of 70 outlined above in order for the service provider to be go through to the interview evaluation.

6.3 Interviews Evaluation

All service providers who meet the minimum score for technical evaluation will be invited to attend an hour's interview at their own expenses at GTAC in Pretoria and the venue will be communicated. The interviews will be to verify the following:

a) Knowledge and understanding of critical areas:	20
b) Practical application and problem solving	40
c) Interpretation of Terms of Reference and approach:	40
Total Score	100
Total Technical Threshold	70

The interview must attain the minimum score of 70 as outlined above.

The below matrix will be used in scoring the interviews:

The below matrix will be used in scoring the proposals: Description of Quality Criteria and Sub-criteria	Scoring	Weight
Total Functionality	Total Score	100%
A. Knowledge and understanding of the following critical areas:		
Infrastructure delivery management in RSA Public Sector Knowledge of GIAMA, SCM and other applicable legislation		
Excellent = Knowledge and understanding of the stated critical areas meets and exceeds the required competencies to deliver on the scope of work.	5 = Excellent	20%
Very Good = Above average knowledge and understanding of the stated critical areas	4 = Very Good	
Good = Satisfactory knowledge and understanding of the stated critical areas	3 = Good	
Below Average = Below average knowledge and understanding of the stated critical areas	2 = Below Average	
Poor = Unacceptable level of knowledge and understanding of the stated critical areas	1 = Not Acceptable	
B. Practical application and problem solving in the following critical areas:		

The below matrix will be used in scoring the proposals: Description of Quality Criteria and Sub-criteria	Scoring	Weight
Total Functionality	Total Score	100%
<ul style="list-style-type: none"> • Programme and project planning, implementation and management • Procurement, contract and financial management • IDMS and FIDPM • SCM for infrastructure • Procurement management and associated procurement committees • Condition assessments • IAR, U-AMPS, C-AMPS • Provincial and local government legislation and regulations • Capacity building, coaching and facilitation • Strategic management • Stakeholder engagement and management • Scoping, diagnostic and situational analysis 		
Excellent = Experience meets and exceeds the required practical application and problem solving for the stated critical areas	5 = Excellent	40%
Very Good = Above average experience and competency in the practical application and problem solving for the stated critical areas	4 = Very Good	
Good = Average experience and competency in the practical application and problem solving for the stated critical areas	3 = Good	
Below Average = Below average understanding and competency in practical application and problem solving for the stated critical areas	2 = Below Average	
Poor = Unacceptable level of competence in practical application and problem solving for the stated critical areas	1 = Not Acceptable	
C. Interpretation of Terms of Reference and approach:		
Understanding of what is required, proposed approach and methodology to address the objectives		
5 = Presentation and proposal demonstrates an excellent and thorough understanding of the scope of work and terms of reference	5 = Excellent	40%
4 = Presentation and proposal demonstrates an above average understanding of the scope of work and terms of reference	4 = Very Good	
3 = Presentation and proposal demonstrates an average understanding of the scope of work and terms of reference	3 = Good	
2 = Presentation and proposal demonstrates a below average understanding of the scope of work and terms of reference	2 = Below Average	
1 = Presentation and proposal demonstrates a poor understanding of the scope of work and terms of reference	1 = Not Acceptable	

The service provider must attain a minimum threshold score of 70. Failure to meet a minimum total interview threshold of 70 will result in disqualification of the service provider.

6.4 Minimum score for Quality Evaluation

Service providers that attain a minimum score of 70 in both the technical and interview evaluation will be evaluated for price and BBBEE.

7 ASSUMPTIONS AND RISKS

7.1 Assumptions

The assumptions are as follows:

- LDPWR&I will consult all the relevant partners and stakeholders and get their buy-in for the project;
- Beneficiaries have been identified;
- Beneficiaries will avail themselves and cooperate by supplying the relevant; documents or avail themselves for appointments where required for the purposes of the project;
- Logistical and administrative support to the project will be provided;
- Where challenges are faced, such will be escalated appropriately within the officially established project structures;
- The project team will at all times observe the alignment of their deliverables to the outputs of the programme; and
- The project team will focus on the work required, in so far as it relates to the project and shall not engage in any departmental work to supplement general departmental human resources.

7.2 Risks

The envisaged risks are as follows:

- Time delays due to little or lack of cooperation from the relevant officials as and when requested to do so;
- Non availability of baseline data resulting in the team having to create systems from the start;
- Project team members" lack of integration, due to the incorporation of a team of individuals from different organisations having to work together;
- Inability to integrate the programme with the existing other support programmes in the province; and
- Resistance to accept and implement suggested solutions and improvements by beneficiaries.

8 REPORT/S AND EVALUATION

8.1 Report/s

The Expert will be required to submit the following contractual reports:

- Inception Report and high-level Work Plan to be drafted and agreed with the LDPWR&I Counterpart and GTAC LTA;
- Monthly timesheets and reports to be submitted to GTAC LTA by the second working day of each month;
- Close-out Report to be submitted two (2) months before the end of the contract period.

8.2 Evaluation

The work done by the Expert will be evaluated by the Departmental Counterpart and the GTAC LTA.

9 LOGISTICS AND SCHEDULE OF THE ASSIGNMENT

9.1 Project Management

The Expert will be contracted by GTAC to provide technical assistance under the Infrastructure Support programme to LDPWR&I. The Expert will be managed by Departmental Counterpart and report to the GTAC LTA. The Programme Steering Committee will be responsible for governance and overall deliverables of the programme.

9.2 Location where the services are required

The assignment is based in Polokwane in Limpopo, centrally coordinated at the Limpopo Department of Public Works, Roads and Infrastructure (LDPWR&I) and placed in the relevant unit. The Expert will be based in Limpopo for the duration of the assignment. There may be instances where the Expert could be required to travel to GTAC offices in Pretoria and other locations outside Polokwane.

9.3 Time frame and level of effort

The contract period will be from date of appointment to 31 December 2022. The Expert will be expected to work an average of 20 days a month but not exceeding 230 days per year. The contract period will however be reviewed every six months and may be terminated based on any of the following factors:

- Poor performance;
- Lack of need for the Expert for whatever reason; and
- Lack of funds.

9.4 Logistic Support

The LDPWR&I will provide the following logistical support based on the departmental policy:

- One desk and landline telephone within their offices;
- One workstation for the duration of the programme; and
- Boardroom facilities for meetings.

Travel and accommodation costs for approved travel outside of Polokwane will be reimbursed to the technical assistant on the basis of valid slips under the contract. The Expert will be responsible for the following logistical requirements:

- The provision of any telecommunications and stationery and administrative support as required;
- All mobile communications; and
- Parking for private motor vehicle.

10 BID SUBMISSION REQUIREMENTS

Bidders should ensure that the following submission requirements are included in their bids:

- a) Duly completed and signed Standard Bidding Documents (SBD 1, 4, 6.1, 8 and 9).
- b) Tax compliance status requirements: Central Supplier Database (CSD) number/report.

- c) Bidders must submit all the information required for evaluation purposes including the CVs that reflect the qualifications, skills and experience of the proposed expert; as well as the track record of the service provider in successfully concluding similar assignments.
- d) Service Providers can only submit one resource (CV). The CV must be in the format at **Annexure A** accompanied by copies of the persons' tertiary qualifications, and where required. GTAC reserves the right not to evaluate CVs that are not in the required format.
- e) Non-disclosure of SAQA NQF levels of qualifications in the CV (as per the template at Annexure A) will lead to the lowest score for the qualifications' technical criterion (section A of the evaluation criteria).
- f) Non-submission of qualifications will lead to the lowest score for the qualifications technical criterion.
- g) GTAC reserves the right to request receipt of certified copies of qualifications after the closing date of the bid.
- h) International qualifications must be accompanied by SAQA confirmation of accreditation. Non-submission of SAQA confirmation will lead to the lowest score for the qualifications technical criterion (section A of the evaluation criteria).
- i) GTAC reserves the right to reject/not consider non-compliant CVs and qualifications.
- j) GTAC also reserves the right to conduct reference checking.
- k) Bidders must comply with all South African laws; including the Immigration Act 13 of 2002 (as amended).
- l) Prior to appointment, the recommended bidder may be required to submit additional supporting documentation for verification purposes.
- m) Failure to adhere to the above requirements i.e. misrepresentation and/or non-submission of the required documentation may lead to a disqualification or termination of the contract with the appointed service provider at any stage of the implementation.

11 BID VALIDITY PERIOD

The bid will be valid for a period of 90 (ninety) days.

List projects/programmes (where you have worked as an Infrastructure Expert) relevant to this bid that the proposed Technical Advisor was involved in:

<i>NAME OF PROJECT / PROGRAMME</i>	<i>PURPOSE / OBJECTIVES OF THE PROJECT / PROGRAMME</i>	<i>DURATION ON PROJECT / PROGRAMME EXECUTION</i>	<i>NAME OF CLIENT</i>	<i>CLIENT CONTACT PERSON & CURRENT CONTACT DETAILS</i>