

**APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE  
THE DEVELOPMENT OF THE COUNCIL FOR THE BUILT  
ENVIRONMENT'S STRATEGIC PLAN FOR THE NEXT 5  
YEARS**

## 1. BACKGROUND

The Council of the Built Environment (CBE) is a statutory body established in terms of the Council for Built Environment Act (No. 43 of 2000) and an entity of the Department of Public Works and Infrastructure (DPWI). The CBE is a schedule 3(a) public entity and is subject to compliance with the Public Finance Management Act (PFMA) Act No. 29 of 1999 and Treasury regulations.

Sections 3(c) and (d) of the CBE Act mandate it to promote ongoing human resource development in the built environment, and to facilitate participation by the built environment professions in integrated development in the context of achieving national goals. It is an overarching body that lead, regulate, coordinate, and advise the six Professional Councils namely: Architectural Profession, Landscape Architectural Profession, Engineering Profession, Property Valuers Profession, Project and Construction Management Professions, and Quantity Surveying Profession. The CBE also entered into a working relationship with the following professional bodies as part of the built environment family – South African Council for Planners, Environmental Assessment Practitioners Association of South Africa, and South African Geomatics Council. In the main, the central mandate of the Council for the Built Environment is to:

- Transform the Built Environment Industry
- Create skilled Built Environment professionals
- Expedite the empowerment of women, youth and persons with disabilities

The objects of the CBE are to:

- promote and protect the interests of the public in the built environment;
- promote and maintain a sustainable built environment and natural environment;
- promote ongoing human resource development in the built environment;
- facilitate participation by the built environment professions in integrated development in the context of national goals;
- promote appropriate standards of health, safety and environmental protection within the built environment;

- promote sound governance of the built environment professions;
- promote liaison in the built environment in the field of training, both in the Republic and elsewhere, and to promote the standards of such training in the Republic;
- serve as a forum where the representatives of the built environment professions may discuss the relevant required qualifications; standards of education; training and competence; promotion of professional status; and legislation impacting on the built environment.
- ensure the uniform application of norms and guidelines set by the councils for the professions throughout the built environment.

In order to deliver on our goal of transforming the built environment professions, CBE recognizes the value of developing a strategic plan to assess the strengths and weaknesses of our approach and to consider the internal and external factors that influence the trajectory of our work. CBE plans to develop a five-year strategic plan for 2025-2030, to reconfirm the Organization's vision and to establish a design process and approach for the effective implementation and sustainability of its mandate over the next five years. CBE firmly believes that its staff members, professional bodies, and key stakeholders are at the centre of this strategic planning effort, helping to assess ways in which to strengthen the impact of the organization, providing direct input into consultations.

## **2. MAIN OBJECTIVES OF THIS PROJECT**

The main objective of this project is to lead the preparatory process in facilitating the development of a new CBE strategic plan.

This includes assessing the Theories of Change employed by CBE and examining how they serve to deliver CBE's mission. The consultant will support the definition of a detailed outcomes measurement methodology for CBE. The purpose of this service provider is to implement a strategic methodology and support and lead CBE staff, partners, and board in a participatory planning process, ensuring a sense of ownership, engaging meaningfully with the board /council and key stakeholders. The substantive outcome is a five-year strategic plan for the period 2025-2030.

### 3. SCOPE OF WORK

The CBE will consider proposals from potential service providers who demonstrate/supply the following:

- 3.1 Facilitate a 2-day planning session.
- 3.2 Provide technical, strategic and facilitation support to enable the drafting of CBE's Strategic plan for 2025-2030.
- 3.2 An intimate knowledge of Outcome Based Planning which includes the following competencies/tasks:
  - a) S/he will conduct a thorough but focused assessment of CBE's strengths and weaknesses, as well as external opportunities and threats, with a view to identifying appropriate strategic options for the 2025-2030 operational period.
  - b) Carry out a desktop review of documents relevant to an understanding of the mandate, legal framework and context of CBE.
  - c) Conduct needs assessment of CBE, which shall include a review of the existing structure, financial strategy and sustainability and engagement with a view for the future expansion to be components of the final strategy.
  - d) Guide stakeholder mapping and consultations and understand, obtain, and analyse qualitative and quantitative data relevant to stakeholders and partners.
  - e) Undertake and coordinate outcomes-based planning, monitoring and evaluation in line with national strategic priorities and key outcome areas.
  - f) Facilitate intergovernmental planning, monitoring and evaluation cycle, the development of the delivery agreements/ annual outcomes plans etc.
  - g) Facilitate the development of theories of change/ logic models for key CBE outputs and interventions to achieve set outcomes and impacts.
  - h) Ensure the setting of appropriate indicators and targets for key interventions within key outcome areas, including indicator definitions and standards.
  - i) Policy analysis to facilitate appropriate theories of change, setting of indicators and targets and alignment with outcome.

- j) Review, Assess and Analyse (participatory process of critical reflection, analysis and consultation (SWOT analysis).
- k) The selected service provider will assist in the identification of Outcomes for the council for the Built Environment, develop a Theory of Change on how the Outcomes will be attained and the identification of relevant indicators for the Strategic Plans for the next 5 years.
- l) A summary assessment report (synthesising outcomes of document review and interviews with regards to organizational assessment and strategic plan and outlining alternative strategic direction.  
Develop a Strategic Plan aligned to the framework for strategic and annual performance plan from the Department of Planning, Monitoring and Evaluation (DPME).

Provide written inputs to the development of the strategic document for presentation and endorsement at CBE council for approval. A draft strategic plan for CBE, based on information gathered in phases 1 & 2, which includes concrete goals and objectives, and implementation plan.

#### **4. DELIVERABLES/OUTPUTS**

Based on the above, the service provider shall prepare and complete the five-year strategic plan. This shall entail, among other things the following:

- a) A five-year strategy with clear deliverables, key milestones, and direct guidance on implementation to strengthen CBE's mission and vision.
- b) Develop plans and strategies with clear deliverables, indicators and tools that address the Constraints.
- c) External environment assessment and internal environment assessment of the stakeholders/SWOT analysis.
- d) Establish specific objectives for the communication strategy and implement tools for evaluation of the communication strategy.

- e) Present the draft strategic plan to stakeholders to validate.

## **5. QUALITY ASSURANCE**

- 5.1 The appointed service provider shall enter into an agreement with the CBE on the delivery of quality work, within agreed timelines for each section of this proposal.
- 5.2 The appointed service provider will take the responsibility to ensure that all work conforms to the highest professional standards.

## **6. REQUIRED QUALIFICATION AND EXPERIENCE**

- 6.1 Seven years relevant work experience in strategic planning and strategy development in the public sector.
- 6.2 Possess knowledge in the general social, economic and political environment that influences built environment landscape in South Africa.

## **7. PROJECT TIMEFRAME/DURATION**

The successful service provider is expected to spend time in consultation with the CBE prior to the event and after the Strategic planning event. The assignment is expected to be completed within 3 months at a maximum of 300 hours from the start date of the contract.

## **8. EVALUATION PROCESS**

The following evaluation process shall be followed:

- 8.1 Pre-Qualification Criteria (Bidders must meet the following pre-qualification criteria. Failure to meet the following requirement shall result in the disqualification of your proposal:**

- Potential bidders must be registered on the National Treasury Central Supplier Database (CSD). The CSD registration report must be submitted. Prospective bidders

must be tax compliant. This proposal will not be awarded to any bidder who is not registered on the CSD, or whose tax matters are not in order and/or who is a restricted supplier.

**\*\* The CBE reserves the right to verify the authenticity of the information submitted. The results of the verification will take precedence\*\***

## 8.2 Evaluation Phases:

- Phase 1: Technical Evaluation

The bidders' proposal will be evaluated against the set criteria indicated below. A form will be used which will reflect the name of the bidder, the different criteria, with space provided to record the points awarded and motivation for points awarded. The allocation of points will not be affected on a basis of consensus.

The following scoring matrix will be used:

Unable to evaluate	Does not comply with the requirements	Partial compliance with requirements	Full compliance with requirements	Exceeds requirements	Exceptionally exceeds requirements
0	1	2	3	4	5

The following formula will be used to convert the points scored against the weight:

Ps = Percentage scored for functionality by proposal under consideration

So = Total score of proposal under consideration

Ms = Maximum possible score

Bidders will be expected to achieve a minimum threshold score of 60% in order to proceed to the due diligence process.

A due diligence process will be conducted in respect of all short-listed bidders to determine the capability and ability of short-listed bidders to execute this contract. The CBE reserves the right to utilise any one or more of the below due diligence methods:

- Presentation by bidders with pre-determined questions being posed by the CBE. A set of pre-determined questions based on the submitted proposal will be posed. This will be evaluated based on a grading scheme of either consistent or not consistent with the proposal. Should more than 20% of the responses not be consistent to the bidder's proposal their proposal will be disregarded.
- An investigation by the CBE of the bidder's previous contracts carried out, availability of skills or knowledge, existing workload.
- Confirmation of the authenticity and content of the reference letters submitted. (Bidders must provide a minimum of three signed reference letters of the same or similar work undertaken even if this method is not selected for due diligence). Purchase orders will also be accepted, subject to the CBE verifying the authenticity of the information submitted.

Should negative feedback be obtained from the aforementioned that will render the bidder unsuitable to execute the assignment, their proposal will be disregarded at this point, and they will not proceed for further evaluation.

It must be noted that if a service provider has previously undertaken work for the CBE to which a positive report is on record, such report may be used for the purpose of due diligence in the event that the selected method(s) above is/are unsuccessful.

Should the bidder meet the requirements of due diligence, their proposal will proceed to Phase 2.

- Phase 2: Calculation of points

Please note that the proposals will be evaluated using the 80/20 preference point system.

- 80 Points are allocated for price and 20 points are allocated for the service provider's B-BBEE Level of Contribution.
- An original or originally certified copy (it must be fresh ink and not a copy) of the B-BBEE certificate OR valid original sworn affidavit (whichever is applicable) must be submitted to confirm

your B-BBEE Level. Failure to submit a B-BBEE certificate or sworn affidavit will result in the forfeiture of points. Failure to submit a correct and valid certificate or affidavit will result in the forfeiture of B-BBEE points. Only points for price will be allocated. Any enquiries in respect of B-BBEE Status Level Verification Certificates may be directed to the B-BBEE Commission at 012-649 0918. Potential bidders must note that affidavits must adhere to the requirements set out in The Broad Based Black Economic Empowerment Practice Guide 1 of 2022, Determining the validity of a Broad-based Black Economic Empowerment verification certificate, B-BBEE certificate and affidavit, paragraph 17. (Please ensure that your affidavit complies with the requirements set out under this paragraph. If one or more requirements are not met, it will render the affidavit invalid).

**Special note:** Bidders must please ensure that affidavits indicate the title of the deponent i.e. director or member or owner (please circle/underline the relevant title applicable to you); and the full financial year must be stated i.e. date, month and year (not only the calendar year).

During phase 2, points for price will be calculated for all shortlisted bidders in accordance with the following formula:

Where:

$P_s$  = Points scored for price of proposal under consideration

$P_t$  = Rand value of proposal under consideration

$P_{min}$  = Rand value of lowest acceptable proposal

The final points will be calculated as follows:

Points for price: 80 points

B-BBEE Status Level of Contribution: 20 points

Final points: 100 points

A recommendation for award will then be formulated for approval by the relevant delegated authority.

## 9. EVALUATION CRITERIA

The following criteria and weights shall apply when considering the quotations:

ASSESSMENT CRITERIA	WEIGHT	SCORING GUIDELINE
<b>1. SKILLS AND EXPERIENCE OF DEPLOYED PERSONNEL</b>		
Minimum of 7 years experience in strategic planning and development in the public sector. (Attach the CV of the corporate/business/government strategy analyst demonstrating the required 7 years experience in public sector strategy planning)	20	0 = No experience stated 1 = 1-4 years experience 2 = 5-6 years experience 3 = 7 years experience 4 = 8-9 years experience 5 = 10+ years experience
<b>2. PROVIDE REFERENCES OF SIMILAR PROJECTS UNDERTAKEN</b>		
Provide a minimum of three signed reference letters containing: <ul style="list-style-type: none"> <li>• valid contact details</li> <li>• be on official letterheads</li> <li>• bear the signatures of a company official</li> <li>• not be older than 3 years</li> </ul>	20	0 = No letters submitted 1 = 1 signed letter 2 = 2 signed letters 3 = 3 signed letters 4 = 4 signed letters 5 = 5+ signed letters
<b>3. METHODOLOGY</b>		
Project proposal and approach that demonstrates a comprehensive and relevant approach to the requirements of the specifications. The proposal must contain detailed breakdown of activities that will lead to achievement of the expected outputs of the project outlines in section 3 of this RFQ.	30	0 = Poor elements not discussed 1 = Ambiguous methodology and all elements indicated are unrelated or of a low quality 2 = At least 50% of the elements are explained in detail 3 = The methodology is explained in detail and the identified planning tool is aligned to the DPME strategic planning framework 4 = The methodology is explained in detail with more than 1 identified planning tools aligned to the DPME strategic planning framework 5 = The methodology is explained in detail with more than 2 identified planning tools aligned to the DPME strategic planning framework
<b>4. QUAIFICATIONS OF THE PERSONNEL</b>		
Qualified corporate/business/government strategic analyst at a post graduate level in Public/Business Administration, Strategic Management (Attach copies of the required qualifications)	20	0 = No Qualification 1 = Qualification submitted is not relevant to the project in question 2 = Undergraduate in Public/Business Administration and Strategic Management 3 = Postgraduate (Honors) in Public/Business Administration, Strategic Management 4 = Postgraduate (Masters) in Public/Business Administration, Strategic Management

ASSESSMENT CRITERIA	WEIGHT	SCORING GUIDELINE
		5 = Postgraduate (PhD and above) in Public/Business Administration, Strategic Management
<b>5. EMPOWERING SUPPLIER</b>		
An additional point will be allocated if an entity has demonstrated that it has a disabled employee(s) or is owned by disabled persons  The CSD report shall be used to determine the ownership statistics of the bidder. The CBE reserves the right to verify the authenticity of the information submitted.	10	0 = No information submitted 3 = More than 51% black owned entity 4 =100% Black owned entity 5 = 100% Black female/ youth owned entity
<b>TOTAL</b>	<b>100</b>	
<b>Threshold Score</b>	<b>60</b>	

## 10. IMPORTANT CONDITIONS

10.1 Protection of Personal Information - All bidders agree that personal information of persons related to or linked with bidders or respondents to this request for quotations/request for proposals or tender document is/may be required to fulfil the requirements for submitting a bid. All bidders agree that the CBE may collect, keep and process such information provided that the aforesaid uses shall be for purposes of evaluating the bid submitted. Where the information is sought to be used for other purposes, further and specific consent shall be obtained.

10.2 Bidders shall note that any personal information that they may disclose to or share with the CBE pursuant to this request/Bid may be processed by the CBE in terms of the Protection of Personal Information Act, No.4 of 2013 and Regulations promulgated thereunder (“POPI Act”). By disclosing or sharing any personal information, the bidder is unconditionally consenting to the processing thereof by the CBE, its stakeholders or partners of such personal information for purposes related to this request/Bid. Further, the bidder declares all consents required by the POPI Act or any other law applicable in respect of all personal information disclosed has been duly and legally obtained. Thus, the bidder hereby indemnifies the CBE against any civil or criminal action, administrative fine or other penalty or loss that may arise as a result of the processing of any personal information disclosed to the CBE pursuant hereto.

10.3 Bidders must indicate the price per hour based on the latest Department of Public Service and Administration (DPSA) Hourly Fee Rates for Consultants (1 July 2020). This fee structure is available at [www.dpsa.gov.za](http://www.dpsa.gov.za) . The assignment will be limited to 300 hours and will be conducted

over three (3) months. Using rates higher than the prescribed DPSA Rates will result in the disqualification of your proposal.

v. Bidders must quote on 300 hours of service to be delivered. Failure to do so will result in the disqualification of your proposal.

10.4 The language of this specific contract is English.

10.5 The price quoted must be inclusive of VAT (if applicable) and prices must be firm over the contract period. No price adjustments will be permitted during the tenure of the contract.

10.6 All Supply Chain Management compliant (required) documents must be completed in full and submitted. These include SBD 1, SBD 4, and SBD 6.1

10.7 Bidders must submit the company registration documents (CIPC), share certificate and ID documents of all Directors.

10.8 Any award made to a Bidder under this proposal is conditional upon the Bidder accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which the CBE is prepared to enter into a contract with the successful Bidder.

10.9 The General Conditions of Contract (GCC) are to be acknowledged and returned with your bid.

10.10 All parties forming a joint venture or consortium for the purpose of this assignment must submit a separate CSD report for each party and all SBD forms and GCC must be completed by each party to the joint venture or consortium and submitted accordingly.

10.11 Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements (where applicable). The CBE will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

10.12 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.

10.13 The CBE reserves the right to disregard a bidders' proposal should it be found that work was previously undertaken for the entity to which poor performance was noted during the

execution of such contract that subsequently led to the cancellation of said contract in the last five years. Documentary evidence of poor performance without a cancellation of the contract may also result in the disqualification of the bidders' proposal.

10.14 Any communication between the closing date and the award of the proposal by Bidders is discouraged.

10.15 Whilst all due care has been taken in connection with the preparation of this proposal, the CBE makes no representations or warranties that the content of the proposal or any information communicated to or provided to Bidders during the bidding process is, or will be, accurate, current or complete. The CBE and its employees and advisors will not be liable with respect to any information communicated which may not be accurate, current or complete.

10.16 If a Bidder(s) finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this proposal or any other information provided by the CBE (other than minor clerical matters), the Bidder(s) must promptly notify the CBE in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the CBE an opportunity to consider what corrective action is necessary (if any).

10.17 Any actual discrepancy, ambiguity, error or inconsistency in the proposal or any other information provided by the CBE will, if possible, be corrected and provided to all Bidders without attribution to the Bidder(s) who provided the written notice.

10.18 Bidders' attention is drawn to the fact that amendments to any of the Bid Conditions or setting of counter conditions by Bidders or qualifying any Bid Conditions will result in the invalidation of such proposals.

10.19 The CBE supports the spirit of broad based black economic empowerment and recognises that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent, and legally compliant manner. Against this background the CBE condemns any form of fronting.

10.20 The CBE, in ensuring that Bidders conduct themselves in an honest manner may, as part of the evaluation process, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry /

investigation, the onus will be on the Bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the proposal / contract and may also result in the restriction of the Bidder /contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies the CBE may have against the Bidder / contractor concerned.

10.21 A Bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this BID. In the event that the CBE allows a Bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the Bidder and the CBE will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.

10.22 If a Bidder breaches the conditions of this proposal and, as a result of that breach, the CBE incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the Bidder indemnifies and holds the CBE harmless from any and all such costs which the CBE may incur and for any damages or losses the CBE may suffer.

10.23 Proposals must be emailed to both [sthembile@cbe.org.za](mailto:sthembile@cbe.org.za) and [afika@cbe.org.za](mailto:afika@cbe.org.za).

10.24 Bidders must please note that the CBE server can receive files to a maximum size limit of 150mb (inclusive of message content and attachment). Should files exceed this size limit, bidders may either send their files in separate emails or alternatively compress the files and submit.

10.24 The original or originally certified BBBEE Certificates or original sworn affidavits must be hand delivered to 179 Lunnon Road, Hillcrest Office Park, Lourie Place, 2nd floor, Hillcrest, Pretoria and deposited into the bid box before the closing date and time stipulated below, as the documents must be original or originally certified copies.

10.25 It is the responsibility of prospective bidders to ensure that their proposal documents are submitted before the closing date and time of the proposal.

10.26 Proposals received after the closing time and date will not be considered for evaluation.

10.27 The CBE reserves the right not to award this contract.

10.28 The CBE will enter into a formal contract with the successful bidder.

10.29 Any change of information provided in the bid document that may affect service delivery by the successful bidder must be brought to CBE's attention as soon as possible. Failure to comply may result in the contract being terminated.

10.30 Should the bidder present information intentionally incorrectly/fraudulently their proposal will be disqualified.

10.31 It must be noted that payment will be made upon satisfactory delivery of the service and receipt of an invoice.

10.32 The invoice will be paid within 30 days of receipt thereof. No deposit, advance and lump-sum payments will be made. A shorter payment period may be agreed upon by the CBE and the successful supplier and a supplier development agreement will be signed in this regard.

To be considered for the shorter payment period the service provider must meet the following requirements:

- Be at least 51% black owned.
- Be an Exempt Micro Enterprise (EME) (Turnover under R10 million) or a Qualifying Small Enterprise (QSE) (Turnover less than R50 million), subject to the specific Sector Code

10.33 The CBE reserves the right to increase or reduce the scope of work during the contract duration subject to the relevant approval being obtained.

- The closing date for submission of proposals is **1 June 2023** at 11:00am.
- Proposals will be valid for a period of 30 days after the closing date of the proposal.

**\*\*Special Note:** The CBE reserves the right not to award two contracts that are in direct conflict with each other to the same service provider.

## 11. ENQUIRIES

All queries must be directed to the relevant officials as follows:

Supply Chain Management:

Technical:

Procurement Officer

Strategic Planning, Performance Monitoring & Evaluation

Ms S. Madonsela

Ms K Mokoene

Tel: 073 157 1433

Tel: 082 904 6493

E-Mail: [sthembile@cbe.org.za](mailto:sthembile@cbe.org.za)

E-Mail: [Khuthala@cbe.org.za](mailto:Khuthala@cbe.org.za)