



BA-PHALABORWA MUNICIPALITY
MEMORANDUM
- BUDGET AND TREASURY _

To : Prospective service provider
From : SCM /stores
Date : 07/11/2023
Enquiries : Procurement Office
Telephone : 015 780 6361/62
Ref : REQ4123

Kindly furnish this office with a written quotation for supply of goods/ services as detailed below. The quotation must be submitted on the letterhead of your Business and Brought to our offices No.3 Nyala Street, Phalaborwa not later than 16/11/2023 at 12H00

QUANTITY	Description	Price/unit (Inc. Vat)	Delivery Period
1	APPOINTMENT OF SERVICE PROVIDER TO FACILITATE STRATEGIC PLANNING SESSION ON 06-08 DECEMBER 2023		

Please number your quotes (Your Ref no)

The following conditions will apply:

- Price (s) quoted must be valid for at least thirty (30) days from date of your offer.
- The municipality retains the prerogative to reject any quotes it deems to be excessive
- A firm delivery period must be indicated.
- Tax Clearance Pin
- A service provider be registered with central supplier database (CSD)
- Completed MBD4 (Declaration of Interest) Form
- Evaluation criteria: 80/20 (Whereby 80 is for price and 20 is for Objective goals)
20 is further evaluated: 20 for 100% Black owned;
18 for +51% Black owned; and
14 for Less than 51% Black owned



MEMORANDUM

2024/25 BPM STRATEGIC PLAN - FACILITATOR APPOINTMENT SPECIFICATION

1. Specification

The selected Service Provider must possess the capability to:

- 1.1. Facilitate and conduct a comprehensive review of the 2023-2024 Municipal Strategic Plan.
- 1.2. Evaluate the current organizational performance in alignment with the institutional strategies, assessing the attainment of set objectives.
- 1.3. Produce a Revised 2024/25 Strategic Plan document for the Municipality, reflecting the outcomes of the review.
- 1.4. Collaborate with key stakeholders during the planning session, ensuring their input and perspectives are integrated.
- 1.5. Provide expertise in change management, ensuring a smooth transition from the previous plan to the revised one.

2. Scope of Work:

- 2.1. Facilitate a three-day strategic planning session.
- 2.2. Review and compile the 2024/25 strategic plan document, ensuring it is comprehensive and well-structured.
- 2.3. Facilitate and guide the process of reviewing the Vision, Mission, Objectives, and strategies in a participatory manner.
- 2.4. Work closely with municipal staff to develop a practical and actionable implementation plan for the strategic objectives.
- 2.5. Provide post-session support, including clarification and elaboration of strategic goals if required.
- 2.6. Ensure that the final strategic plan document is not only complete but also easily comprehensible for all stakeholders.

3. Timeframe:

3.1. The facilitator must submit the first draft of the Strategic Plan document no later than December 31, 2023, to allow for a comprehensive review and feedback process.

4. Experience

- 4.1. The company should have 10 years' experience in developing, reviewing of Municipal Strategic Plan and facilitation of the Strategic Planning Session
- 4.2. Team members should have recognized B Degree in Business Management & Administration, Strategic Planning, Development Studies, and Local Governance & Public Administration
- 4.3. At least one team member must have a minimum of 10 years' experience focusing on Strategic Planning, Integrated Development Planning and Project concepts and evaluation: Relevant experience in Local Government.
- 4.4. Traceable record in developing, reviewing, and facilitating Strategic Planning Documents for local government (profile of previous work done).
- 4.5. Excellent Strategic Plans conceptualization and packaging skills; and
- 4.6. Excellent command of the English language
- 4.7. Team members should also have expertise in conducting scenario planning and risk assessment for strategic initiatives.
- 4.8. A track record of successfully fostering stakeholder engagement and consensus-building in strategic planning.
- 4.9. Proficiency in utilizing technology and data analytics for evidence-based strategic planning.

5. Planned Date

- 5.1. Planned date for strategic planning session is from 06 December 2023 — 08 December 2023.

6. Pricing Breakdown

The Service Provider should provide a comprehensive cost breakdown including:

- 6.1. Facilitation of the three-day session, including all materials and equipment.
- 6.2. Detailed information on travel expenses, including transportation and any related costs.
- 6.3. Accommodation costs for facilitators and any support staff.
- 6.4. A clear breakdown of the cost associated with consolidating inputs and producing the draft and final documents, including any additional editing or design services.
- 6.5. An itemized budget for any additional services, such as post-session support or training of municipal staff on the implementation of the plan.