



BA-PHALABORWA MUNICIPALITY
MEMORANDUM
- BUDGET AND TREASURY -

TO : *Prospective Service Provider*
FROM : *SCM /STORES*
DATE : *30/05/2024*
ENQUIRIES : *STORES*
TELEPHONE : *015 780 6361/62*
REF : *REQ5154*

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 3 Nyala Street, Phalaborwa not later than **10/06/2024 at 12H00**

QUANTITY	Description	PRICE/UNIT (Inc. VAT)	DELIVERY PERIOD
1X	23/24 SDBIP Review		
	See attached specification		

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)*
- *Registered with CIPRO (CK 1 or 2 document)*
- *Completed MBD4 (Declaration of Interest) Form*
- *Evaluation criteria: 80/20 (Whereby 80 is for price and 20 is for SPECIFIC POINTS SYSTEM)*
20 is further evaluated as: 20 for 100% Black owned; 18 for at least 51% Black owned; and 14 for Less than 51% Black owned

Fill in and Return the Declaration of Interest Form.

REQUEST FOR QUOTATION (RFQ) SPECIFICATION

REVIEW OF THE SERVICE DELIVERY AND BUDGET IMPLEMENTATION PLAN (SDBIP) AND PERFORMANCE PLANS FOR THE MUNICIPAL MANAGER AND SENIOR MANAGERS FOR THE FINANCIAL YEAR 2024-2025

1. BACKGROUND

Ba-Phalaborwa Local Municipality seeks to engage a qualified and experienced service provider to review its Service Delivery and Budget Implementation Plan (SDBIP) and the performance plans for the Municipal Manager and Senior Managers for the financial year 2024-2025. This review is in accordance with the Municipal Finance Management Act (MFMA), (Act No. 56 of 2003).

The SDBIP should provide reliable management information and a comprehensive plan for service provision, including necessary inputs and financial resources. The SDBIP must ensure alignment between the Integrated Development Plan (IDP) and the Budget, translating the municipality's objectives into quantifiable outcomes to be executed by the administration within the financial period. It should include service delivery targets and performance indicators for each quarter, aligned with the performance agreements of senior management, thereby enabling effective oversight of both financial and non-financial performance of the municipality.

2. SCOPE OF WORK

The appointed service provider will be required to:

1. Review and Update the SDBIP:

- 1.1. evaluate the current SDBIP for alignment with the IDP and Budget.
- 1.2. Update the SDBIP to reflect realistic and achievable service delivery targets and budget allocations.
- 1.3. Ensure the SDBIP includes clear, measurable performance indicators and targets for each quarter.

2. Review Performance Plans:

- 2.1. Assess the performance plans for the Municipal Manager and Senior Managers.
- 2.2. Ensure alignment with the updated SDBIP and overall municipal goals.
- 2.3. Recommend adjustments to performance targets and indicators as necessary.

3. Compliance and Best Practices:

- 3.1. Review Performance Framework and Policy
- 3.2. Ensure the SDBIP and performance plans comply with MFMA requirements and other relevant legislation.
- 3.3. Incorporate best practices in public sector performance management.

4. Engagement:

- 4.1. Engage with senior management and municipal officials to gather input and feedback.
- 4.2. Facilitate workshops or meetings as necessary to ensure buy-in and understanding of the updated SDBIP and performance plans.

5. Reporting:

- 5.1. Provide a comprehensive report detailing the review process, findings, and recommendations.
- 5.2. Present the updated SDBIP and performance plans to the Municipality.

6. Deliverables:

- 6.1. Updated SDBIP document for the financial year 2024-2025.
- 6.2. Updated performance plans for the Municipal Manager and Senior Managers.
- 6.3. Detailed report on the review process, including engagement outcomes and recommendations.

7. Qualifications and Experience:

The service provider must demonstrate:

- 7.1. Proven experience in developing and reviewing SDBIPs and performance plans for local government.

- 7.2. In-depth knowledge of the MFMA and related legislation.
- 7.3. Strong analytical and report-writing skills.
- 7.4. Experience in stakeholder engagement and facilitation.
- 7.5. Familiarity with best practices in public sector performance management.

8. Submission Requirements:

Interested service providers are requested to submit:

- 8.1. A detailed proposal outlining the approach and methodology for the review.
- 8.2. A work plan with timelines and key milestones.
- 8.3. Profiles of the team members, highlighting relevant experience and qualifications.
- 8.4. A list of similar projects completed, including references.
- 8.5. A cost breakdown for the services to be provided.

9. Functionality

NO.	Evaluation Criteria	Weight	Points
1	Firm Experience	<ul style="list-style-type: none"> • 10 Points. Firm with 12 Years or more experience in Internal Audit at Local Government Level (Internal Audit Appointment Letter at Local Government 12 years or more ago). • 5 Points. Firm with 8-11 Years of experience in Internal Audit at Local Government Level (Internal Audit Appointment Letter at Local Government between 8-11 years ago) • 0 Points. Firm with less than 8 Years of experience in Internal Audit at Local Government Level (Internal Audit Appointment Letter at Local Government less than 8 years ago). 	10
2	Similar audit (performance review) engagements undertaken at different Municipalities (Excluding Panel Appointments and Quotations)	<ul style="list-style-type: none"> • 40 Points. 25 Internal Audit Appointment Letters at different Municipalities (Excluding Panel Appointments and Quotations). • 20 Points. 20-24 Internal Audit Appointment Letters at different Municipalities 	40

		<p>(Excluding Panel Appointments and Quotations).</p> <ul style="list-style-type: none"> • 0 Points. Less than 20 Internal Audit Appointment Letters at different Municipalities (Excluding Panel Appointments and Quotations) 	
3	Internal Audit Projects with Clean Audit Opinion at Local Government Level only (Excluding Panel Appointments and Quotations)	<ul style="list-style-type: none"> • 30 points. Clean Audit Reference Letters from 5 different Municipalities with AGSA Audit Reports were appointed as Internal Auditors (Clean Audit Reference Letters and AGSA Audit Reports). • 15 points - Clean Audit Reference Letters from 3-4 different Municipalities with AGSA Audit Reports were appointed as Internal Auditors (Clean Audit Reference Letters and AGSA Audit Reports). • 0 Points. Less than 3 Clean Audit Reference Letters from Municipalities were appointed as Internal Auditors (Clean Audit Reference Letters and AGSA Audit Reports) 	30
4	Director Experience	<ul style="list-style-type: none"> • 15 points. Company Director as per CIPC is a Chartered Accountant of South Africa with more than 15 years post qualification experience (Chartered Accountant of South Africa Certificate and CIPC Registration Documents). • 7.5 points. Company Director as per CIPC is a Chartered Accountant of South Africa with 10-14 years post qualification experience (Chartered Accountant of South Africa Certificate and CIPC Registration Documents). • 0 points. Company Director as per CIPC is not a Chartered Accountant of South Africa 	15

5	Internal Audit Manager Experience	<ul style="list-style-type: none"> • 5 points. Internal Audit Manager is a Certified Internal Auditor and 10 years post SAICA Articles (Certified Internal Audit and SAICA Completion of Articles Certificate). • 0 points. Internal Audit Manager is not a Certified Internal Auditor and/or post SAICA Articles 	5
	Total Functionality Weights	100%	100%
	Threshold to Qualify for Appointment	80%	80%

10. Contact Information:

For further information or clarifications, please contact: **The Strategic Planning Manager, Ms Malishilane Chueu - chueum@ba-phalaborwa.gov.za / 015 780 6872/3.**