



enterprise ilembe

ECONOMIC DEVELOPMENT AGENCY

TERMS OF REFERENCE

FOR

**THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT AND
IMPLEMENTATION OF A BRAND, MARKETING & COMMUNICATION STRATEGY**

Closing Date: 15 January 2020

Closing Time: 11h00

Information Contact: Ms C Peters

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SERVICE PROVIDER TERMS OF REFERENCE

It is the intention of Enterprise iLembe to enter into a formal contract with a service provider or consortium to provide the services described herein. These Terms of Reference and the bidder's proposal will form the basis of the contract.

Section 1: Details

Province:	KwaZulu-Natal
Agency:	Enterprise iLembe Economic Development Agency
Project Name:	The Development and Implementation of a Brand, Marketing & Communication Strategy

Section 2: Background

Enterprise iLembe is an economic development agency wholly-owned by the iLembe District Municipality with its key mandate being the following;

- To drive Economic development
- To promote Trade and Investment Promotion
- To market the District as a number one tourist destination
- To work with local government to facilitate a business enabling environment
- To implement business, retention and expansion (BR&E) programmes in partnership with local business

The objective of Enterprise iLembe is to improve the competitiveness of the iLembe Region by creating an environment that will enable local business to compete successfully on the international stage.

Section 3: Scope of Work

3.1 TASK DESCRIPTION AND EXPECTED OUTPUTS

Enterprise iLembe hereby requests proposals from suitably qualified and experienced service providers to assist the entity with the Development and Implementation of a Brand, Marketing & Communication Strategy, in line with the entity's mandate.

The scope of work required is as follows;

- 1) Development of a Brand, Marketing & Communication Strategy**
- 2) Implementation of the Brand, Marketing & Communication Strategy**

Kindly note that responsive bidders may be required to present their proposals to Enterprise iLembe during the course of the bid adjudication process.

Section 4: Time Frame & Reporting

The appointment will be effective for a total period of three years.

- **Development of the Brand, Marketing & Communication Strategy (3 months)**
- **Implementation of the Brand, Marketing & Communication Strategy (33 months)**

Reporting

The Service Provider will be required to prepare and present progress reports coinciding with each of the agreed milestones. Where considered necessary the Service Provider will also be expected to compile reports and presentations for other bodies as required by Enterprise iLembe. The service provider will be expected to keep financial records and other appropriate records.

Section 5: Deliverables & Ceiling Costs

Payments will be made on invoices submitted for work completed. On receipt of invoices and relevant documentation for work rendered the service provider should allow at least 4 weeks for the payments to be processed.

Section 6: Documentation and Confidentiality

Information and data which is generated in the context of the project; may not be made available to any third party without prior permission of the Chief Executive Officer and shall remain the property of Enterprise iLembe. All project material shall be presented in both hard copy and electronic format.

Section 7: Non - Appointment

Enterprise iLembe has a right not to make an appointment should it find that proposals received do not meet the specified criteria / requirements and is not compelled to accept the lowest quotation.

Section 8: Requirements Related to Tender

Please note that it is mandatory to complete Annexure A, MBD 1, 4 and 6.1 forms. Failure to complete these documents and return it with your submission will disqualify your bid in its entirety.

Compulsory Briefing Session

Please note that a compulsory briefing session will be held on 10 December 2019 at 09h00 at the Sangweni Tourism Centre, Ballito (**address listed below**).

Kindly note that as this is a **compulsory briefing session**, failure to attend this briefing and sign the attendance register on the day of the briefing will disqualify your bid in its entirety.

Submission of Proposals

Proposals must be submitted in sealed envelopes endorsed “**APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT AND IMPLEMENTATION OF A BRAND, MARKETING AND COMMUNICATION STRATEGY**” and must be hand delivered and placed in the tender box at **Sangweni Tourism Centre, Cnr. Link Road & Ballito Drive, Ballito** and addressed to;

**The Chief Executive Officer
Enterprise iLembe,
Sangweni Tourism Centre,
Cnr Link Road & Ballito Drive.**

The closing date for receipt of proposals is on or before **15 January 2020 at 11h00**.

Please note: All proposals must be hand-submitted to the tender box, and incomplete, faxed, emailed applications and applications received after the closing date and time **WILL NOT** be considered. Bidders using a courier service to deliver documents are responsible for ensuring that such delivered documents are physically deposited in the tender box.

It is compulsory for bidders to ensure that their proposals are bound or stapled securely together. If the proposal is too thick to be bound or stapled, bidders are allowed to split the document into sections, however, each section must be bound or stapled and must be individually labelled with the name of the bidder. Under NO circumstances will loose submissions be accepted.

Enterprise iLembe does not bind itself to accept the lowest or any of the bids and reserves the right to accept the whole or part of the bid proposal.

Section 9: Adjudication Criteria

Proudly South Africa Campaign

Preference will be given to entities in terms of the following order:

- Firstly – suppliers and businesses operating within the iLembe District;
- Secondly – If no suitable suppliers are found within the iLembe District, suppliers and businesses operating within the Province of KwaZulu-Natal shall be considered;
- Thirdly – If no suitable suppliers are found within the Province of KwaZulu-Natal, suppliers and businesses operating within the Republic of South Africa shall be considered.

In order to comply with this provision, bidders are requested to submit Utility Bills or Councillor Letters (with **original signature**), as proof of residence. **(COMPULSORY)**

Procurement Policy

Bids will be evaluated in terms of the Procurement Policy of Enterprise iLembe as follows:-

- All proposals received shall firstly be evaluated on functionality and thereafter only those who qualify for the next stage of evaluation will be evaluated in terms of the

PPPFA (No.5 of 2000) read together with the 2017 Preferential Procurement Regulations and the 2011 B-BBEE Regulations.

Any bid that fails to achieve a minimum of 60 points on the functionality evaluation shall not be evaluated further and will be deemed to be non-responsive.

Functionality Evaluation

The functionality evaluation points will be applied as per the table that follows;-

Competencies

NB: Bidders must demonstrate by submitting documentary proof in relation to the claim of points with respect to the following key competencies/areas in order to claim points in the functionality evaluation:

#	Competency	Point Allocation	Maximum points
1	<p><u>Bidder's Years of Experience:</u></p> <p>Supporting documents required: Company Profile together with the table referred to on page 8 of this document detailing the number of year's experience in the following areas:</p> <p>1. Marketing & Communications</p> <p>2. Public Relations and Brand Development</p>	<p>No experience – 0 points 1 year – 10 points 1 – 5 years - 20 points Above 5 years - 30 points</p>	30
2	<p><u>Project Experience:</u></p> <p>Supporting documents required:(References Letters)</p> <p>The bidder must provide letters of reference relating to similar work undertaken in the past five years</p>	<p>1 letter = 5 Points 2 letters = 7 Points 3 letters = 15 Points</p>	15

3	<u>Team Qualifications & Experience:</u>	<u>TOTAL POINT ALLOCATION</u> <u>(3.1 to 3.5) = 25 points</u>	25
3.1	Supporting documents required: The bidder must provide a short CV of their team members (maximum of 5 to be submitted).	Capacity to deliver (Number of team members) 1 = 1 Points 2 = 2 Points 3 = 3 Points 4 = 4 Points 5 = 5 Points	
3.2	Supporting document required: A breakdown of similar projects undertaken for the past five years with traceable references in the tabular format referred to on page 8 of this document detailing the number of year's experience	Project Management (Number of Relevant Projects the company has been engaged in) 1 = 1 Points 2 = 2 Points 3 = 3 Points 4 = 4 Points 5 = 5 Points	
3.3	Supporting documents required: The bidder must provide a short CV of their team members (maximum of 5 to be submitted as per 3.1. above). The number of projects in which design skills were required must form part of the CV in order for points to be awarded.	Design Skills (Number of Projects) 1 = 1 Points 2 = 2 Points 3 = 3 Points 4 = 4 Points 5 = 5 Points	

3.4	Supporting documents required: The bidder must provide a short CV of their team members (maximum of 5 to be submitted as per 3.1. above). Projects in which Copy writing & Editing were required must form part of the CV together with the earliest start dates of such projects in order for points to be awarded.	Copy writing & Editing (Number of Projects) 1 = 1 Points 2 = 2 Points 3 = 3 Points 4 = 4 Points 5 = 5 Points	
3.5	Supporting documents required: The bidder must provide a short CV of their team members (maximum of 5 to be submitted as per 3.1. above). Projects in which Public Relations were required must form part of the CV together with the earliest start dates of such projects in order for points to be awarded.	Public Relations (Number of Projects) 1 = 1 Points 2 = 2 Points 3 = 3 Points 4 = 4 Points 5 = 5 Points	
4	<u>Local Criteria (Proudly South African Campaign):</u> Supporting documents required: (Please provide proof of residence in the form of Councillor Letters, Utility Bills or Lease Agreements)	Within iLembe- 10 points Within KZN - 7 points Within RSA - 5 points	10
5	Methodology and Approach		20
	TOTAL POINTS CLAIMABLE		100

In order to be awarded points for the competencies 1 AND 3.2 listed above, please submit the following:

- A list of **contactable references** for similar projects undertaken in the **following format**:

Client Name	Nature of Work Undertaken	Start Date	Date of Completion	Amount	Client Contact Person	Tel No.

Only bidders who achieve a total of 60 points for functionality in terms of the above will then be evaluated in terms of the 80/20 preference points scoring system. Bidders wishing to claim preferential points must attach B-BBEE certificate.

The 80/20 preference point scoring system will be applied with points allocated as follows:-

- 80 points for the price;
- 20 points for B-BBEE status level

The 20 preference points will be allocated based on B - BBEE status level of contribution and shall be allocated as per table that follows:-

Status Level of Contributor	Preference Points on scorecard (80/20 System)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-contributor	0

Pricing Instructions:

- Bidders must submit two (2) quotations i.e.
 - Price to develop the Brand, Marketing & Communication Strategy (once off total cost) (**COMPULSORY: Annexure B, Table 1**),
 - Price per hour for various activities for the implementation of the strategy (**COMPULSORY: Annexure B, Table 2**), this is to ensure a fair/even evaluation on pricing.
- N.B – The strategy once developed should have an implementation plan with total indicative costings per activity. The entity will then approve which activities should be implemented in line with available budgets within the financial year.
- Ad-hoc requirements will be requested on quotations basis before approval.

- All prices shall be tendered including VAT and other applicable taxes.
- All prices tendered must include all expenses, disbursements and costs (e.g. transport, overheads, accommodation etc.) that may be required in and for the execution of the work described in the Specification, and shall cover the cost of all general risks, liabilities and obligations set forth or implied in the Contract as well as overhead charges and profit (in the event that the tender is successful).
- All prices tendered will be final and binding.
- All prices in the pricing schedule will be considered when awarding the tender.

The preference point calculation will be done on the estimated total of all three years.

Section 10: Required Annexures

1. **Annexure A: Compulsory Information Sheet (see below)**
2. **Annexure B: Compulsory Pricing Sheet (see below)**
3. **Service Providers Proposal**
4. **Registration details & Compliance**
 - All interested bidders must be registered on the Central Supplier Database for Government. The detailed registration report must be attached to the proposal (along with the Supplier Number and the Unique registration reference number). **(Compulsory). Please visit <https://secure.csd.gov.za/> to register on the Central Supplier Database.** The CSD will be used to verify tax compliance status of the bidder. NB: Bidders who are in service of the state as per CSD will be disqualified from further evaluation unless supporting documents proving the supplier is not a government employee is submitted as part of the proposal.
 - All bidders must submit a Valid Tax Clearance Certificate (Compulsory). In line with the latest circular from SARS (South African Revenue Services), bidders can now submit a **UNIQUE PIN** to enable the municipality to verify the bidder's tax compliance status online via E-filing.
 - MBD 1, 4 and 6.1 Forms. **Please note that the MBD 6.1 Forms have been revised. Please ensure that the 2017 MBD 6.1 Forms are submitted. These forms are available upon request via e-mail or on our website www.enterpriseilembe.co.za (Compulsory).** Please note that the SBD forms will not be accepted.
 - Proof of residence of the bidder (Utility Bill, Councilor Letter or Lease Agreement)

- If the bidder is required by law to prepare annual financial statements for auditing, their audited annual financial statements for the past three years or since establishment if established during the past three years
- Budget Activity Schedule (Cost implications)
- All documents as per the competency table on page 7 & 8 of this document.
- Bank confirmation letter
- Company registration documents showing all active members/ directors/ shareholders/ owners etc.
- Power of Attorney/ Signing authority where applicable
- B-BBEE Verification Certificate (Please attach the approved B-BBEE accreditation certificate if available in order to claim points for this.)

Points to note regarding the B-BBEE Status Level:

- Bidders other than EMEs must submit valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

The following rules are applicable ONLY to consortia / joint ventures / sub-contracting and MUST be adhered to:

- In bids where Consortia / Joint Ventures / Sub-contractors are involved, each party must submit a separate SARS tax clearance certificate / TCS pin AND Central Supplier Database (CSD) registration number.

- In bids where Consortia / Joint Ventures / Sub-contractors are involved, the relevant agreement between all parties involved must be submitted, which clearly outlines the roles and responsibilities specific to this tender.
- A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an Exempt Micro Entity that has the capability and ability to execute the sub-contract.
- A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

ANNEXURE A – MANDATORY INFORMATION (COMPULSORY)

Name of Company: _____

Contact Person/s: _____

Contact Number/s: _____

E-mail address: _____

Postal Address: _____

Details	Please indicate where this information can be found in your proposal
CV's of Team Members	
MBD 1, 4 and 6.1 Forms	
SARS Tax Clearance Certificate/ TCS Pin	
Proof of registration on CSD	
Price	

Above information certified correct:

Signature: _____

Name: _____

Date: _____

NB: By signing this annexure, the bidder accepts the clauses contained within these Terms of Reference.

ANNEXURE B – PRICING SCHEDULE (COMPULSORY)

The following table must be completed in order for the bid to be responsive.

Table 1:

1. Cost to Develop the Brand, Marketing & Communication Strategy: _____

Vat: _____

Total: _____

Table 2 :Hourly Rates in respect of the Implementation of the Strategy:

Function	Estimate	<i>Please include the hourly rate for the most senior team members below</i>		
		Year 1	Year 2	Year 3
Project Manager	1 hour			
Campaign Manager	1 hour			
Graphic Designer	1 hour			
Copy writing & Editing	1 hour			
Marketing Specialist	1 hour			
Photographer	1 hour			
Communications and Public Relations Specialist	1 hour			
Social Media Specialist	1 hour			
Trainer	1 hour			
Translation – Written Zulu	1 hour			
Website Developer	1 hour			
Event Co-ordinator	1 hour			
Total of the Hourly Rates				
VAT				
Total Hourly Rates (Incl VAT)				

- ***Please note that the above tables will be used for the purposes of determining an estimated total cost in order to perform the preference point calculation and the actual costs will be dependent on the actual number of hours worked as well as adhoc goods supplied/ services rendered.***
- ***Also note that the hourly rates chargeable in terms of the implementation of the Brand, Marketing and Communication strategy by the appointed bidder over the three year term must be aligned to those quoted as per table 2 when quotations for specific activities are submitted during the term of appointment.***