TENDER:

EVALUATION SCHEDULE : PRE-QUALIFICATION AND EVALUATION SCORING

CONSULTANT:

Relevant to Terms of Reference:

STAGE 1: PRE-QUALIFICATIONS

Ref: Par. In ToR	QUALIFYING CRITERIA	ITEM DESCRIPTION		Yes	No	Yes	No
8, 19.1	**Project Manager**	The project manager must be a Professional Planner (minimum academic B-degree in Town and Regional Planning) with a minimum of 10 years proven experience/track record of relevant spatial planning and project management, and professional registration and in good standing with the South African Council for Planners (SACPLAN).	Project Manager Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			at least 10 years experience	☐	☐		
			SACPLAN registration attached	☐	☐		
			CV attached	☐	☐		Disqualification
8, 19.1	**Town Planner**	Town Planner be a Professional Planner (minimum academic B-degree in Town and Regional Planning) and be professionally registered and in good standing with the South African Council for Planners (SACPLAN).	Town Planner Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			SACPLAN registration attached	☐	☐		
			CV attached	☐	☐		Disqualification
8, 19.1	**Urban Designer**	An Urban Designer with an appropriate M-degree accredited qualification or equivalent qualification approved by the Urban Design Institute of South Africa (UDISA) and Registration with UDISA.	Urban Design Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			UDISA registration attached	☐	☐		
			CV attached	☐	☐		Disqualification
8, 19.1	**Environmentalist**	An Environmentalist with a minimum B-degree in Environmental Management (or equivalent qualification in Natural/Physical/Environmental Science);	Environmetnalist Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			CV attached	☐	☐		Disqualification
8, 19.1	**GIS Specialist**	A GIS Practitioner with an appropriate B-degree accredited GIS qualification or equivalent qualification approved by the South African Council for Professional and Technical Surveyors (PLATO) or South African Geomatics Council (SAGC) and registration with the South African Geomatics Council (SAGC) or similar.	GIS Specialist Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			Applicable registration attached	☐	☐		
			CV attached	☐	☐		Disqualification
8, 19.1	**Civil Engineer**	A Professional Civil Engineer with a minimum B-degree in Civil Engineering, and professional registration with the Engineering Council of South Africa (ECSA)	Civil Engineer Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			ECSA registration attached	☐	☐		
			CV attached	☐	☐		Disqualification
8, 19.1	**Transport Planner/ Traffic Engineer**	A Professional Transport Planner/ Traffic Engineer with a minimum B-degree in Civil Engineering, and professional registration with the Engineering Council of South Africa (ECSA)	Traffic Engineer Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			ECSA registration attached	☐	☐		
			CV attached	☐	☐		Disqualification
8, 19.1	**Property/Urban Economist**	An Economist with a minimum B-degree in economics.	Economist Certified Qualification Attached	☐	☐	Proceed to Functional Evaluation	
			CV attached	☐	☐		Disqualification

STAGE 2: FUNCTIONALITY EVALUATION: FUNCTIONAL RESPONSIVENESS

Ref: Par. In ToR	FUNCTIONAL CRITERIA	ITEM DESCRIPTION	DELIVERABLE	Adherence	Criteria	Max Score
8,19.2	1. SERVICE PROVIDERS, SKILLS, COMPETENCIES AND EXPERIENCE		Information Required (to be tabulated herein)	Bid Proposal	Scoring Method	30
						0
	Project Management	**Spatial /Development** •Minimum of 10 years postgraduate experience, including integrated development planning, development analysis, municipal spatial planning, LSDF, and precinct planning. •Minimum of 10-years experience in development analysis and planning, and socio-economic profiling. •Proven experience and knowledge of the integrated planning, budgeting, and implementation cycle in municipalities. •Experience in land use planning/ management, and specifically the application of development contributions policies and calculators in determining the infrastructure implications of land use planning investments. •Experience in integrating land use management, environmental, heritage and sector planning (transport, human settlements, economics, etc.) with spatial planning. •Knowledge of municipal powers and functions, service delivery and governance-related legislation and issues in the South African local government sector. •Sound understanding of the SPLUMA, LUPA and the MSA and demonstrable knowledge of the drafting of CEF implementation in line with the relevant guideline documents. •The subject person/s must be a Professional Planner registered with SACPLAN in good standing.	Number of Years demonstrated experience with proven management skills and knowledge in undertaking and managing projects of similar scope and character to that envisioned in these terms of reference.		**6 Points** - Professional Planner as Project Manager with 15 or more years' demonstrated experience with proven management skills and knowledge in undertaking and managing 5 or more projects of similar scope and character to that envisioned in these terms of reference. **4 Points** -Professional Planner as Project Manager with 13 to 14 years' demonstrated experience, proven management skills, and knowledge in undertaking and managing 4 projects of similar scope and character to that envisioned in these terms of reference **2 Points** -Professional Planner as Project Manager with 11 to 12 years' demonstrated experience, proven management skills, and knowledge in undertaking and managing 3 projects of similar scope and character to that envisioned in these terms of reference **1 Points** - 10 years' proven demonstrated experience.	
		Project Management •Proven management skills for projects of similar scope and character. •The ability to manage the process and ensure coordination, integration and alignment of plans, policies, and strategies of all spheres of government. •Experience in innovative public participation at a municipal level. •Report writing and facilitation skills. •The ability to produce thorough, readable, and informative reports and other material. •The project manager should be a Professional Planner registered with SACPLAN in good standing.	Number of projects of similar scope and character to that envisioned in these terms of reference.			

	Spatial Planning (registered town Planner)	•Experience including integrated development planning, development analysis, municipal spatial planning, LSDF and precinct planning. • experience in development analysis and planning, and socio-economic profiling. •Proven experience and knowledge of the integrated planning, budgeting, and implementation cycle in municipalities. •Experience in land use planning/ management, and specifically the application of development contributions policies and calculators in determining the infrastructure implications of land use planning investments. •Experience in integrating land use management, environmental, heritage and sector planning (transport, human settlements, economics, etc.) with spatial planning. •Knowledge of municipal powers and functions, service delivery and governance-related legislation and issues in the South African local government sector. •Sound understanding of the SPLUMA, LUPA and the MSA and demonstrable knowledge of the drafting of CEF implementation in line with the relevant guideline documents. •The subject person/s must be a Professional Planner registered with SACPLAN in good standing	Number of years of demonstrated experience and expertise in spatial planning.		**6 Points** - 10 or more years demonstrated experience and expertise in spatial planning practices. **4 Points** - 5 to 9 years demonstrated experience and expertise in spatial planning practices. **2 Points** - 1 to 4 years demonstrated experience and expertise in spatial planning practices. **0 Points** - No demonstrated experience and expertise in spatial planning practices.	
	Urban Designer	•Proven experience in urban design, LSDF, precinct planning, and public realm design projects of similar scope and character. •Proven Experience with CBD regeneration, streetscape design, and heritage-sensitive urban design. •Proven experience in Streetscape and public space concepts. •Proven experience in urban design and placemaking guidelines. •Proven experience in urban greening strategies and climate change adaptation measures.	Number of years of demonstrated experience and expertise in Urban Design		**3 Points** - 5 or more years demonstrated experience and expertise in urban design practices. **2 Points** - 3 to 4 years' demonstrated experience and expertise in urban design practices. **1 Points** - 1 to 2 years demonstrated experience and expertise in urban design practices. **0 Points** - No experience and expertise in urban design practices.	
	Traffic/Transport Engineer	•Proven experience in transport planning and mobility studies. •Proven experience in pedestrian and non-motorised transport planning. •Proven experience integrating public transport systems.	Number of years of demonstrated experience and expertise in Traffic/Transport Engineering		**3 Points** - 5 or more years demonstrated experience and expertise in Traffic/Transport Engineering **2 Points** - 3 to 4 years demonstrated experience and expertise in Traffic/Transport Engineering **1 Points** - 1 to 2 years demonstrated experience and expertise in Traffic/Transport Engineering **0 Points** - No experience and expertise in Traffic/Transport Engineering	

	Infrastructure service delivery / civil engineering	•Proven experience, including integrated infrastructure demand analysis and planning, capital project investment planning, analysis, prioritisation, and budget planning. •Proven experience and knowledge of the full lifecycle of infrastructure planning and design, including project conceptualisation, Sustainable Urban Drainage Systems, Environmental Infrastructure, master planning, project preparation and project readiness, infrastructure delivery systems. •Knowledge of municipal powers and functions, service delivery and governance-related legislation. •Knowledge and experience in municipal engineering services.	Number of years of demonstrated experience and expertise in infrastructure service delivery / civil engineering		**3 Points** - 5 or more years demonstrated experience and expertise in infrastructure service delivery / civil engineering **2 Points** - 3 to 4 years demonstrated experience and expertise in infrastructure service delivery/ civil engineering **1 Points** - 1 to 2 years demonstrated experience and expertise in infrastructure service delivery/ civil engineering **0 Points** - No experience and expertise in infrastructure service delivery / civil engineering	
	Environmental Management	•Sound knowledge of environmental legislation, institutional structures and environmental assessment and management practices. •Proven experience working on Environmental and Spatial Development Frameworks with demonstrated involvement. •Proven competence to analyse the environment in such a way as to identify significant issues, problems and characteristics and distinguish between underlying causes and superficial symptoms. •Specialist knowledge and demonstrated experience in urban green infrastructure, urban greening strategies, climate change adaptation, and Sustainable Drainage Systems (SuDS), including the application of these approaches to improve urban resilience and environmental sustainability. •Proven experience in integrating green infrastructure, climate adaptation, and sustainable water-sensitive approaches into spatial planning and development proposals. •Proficiency in integrating and coordinating significant components of both the socio-economic and biophysical environments in such a way as to evaluate options and trade-offs and facilitate sound decision-making; •Ability to incorporate and develop proposals that are consistent with the Riverine Management and Maintenance Plans (MMPs) and relevant riverine management objectives, particularly in relation to flood risk, ecological functioning, watercourse protection, and appropriate spatial development. •The ability to offer innovative solutions to address any identified issues in the municipal area.	Number of years of demonstrated experience and expertise in Environmental Management		**3 Points** - 5 or more years demonstrated experience and expertise in environmental management practices. **2 Points** - 3 to 4 years demonstrated experience and expertise in environmental management practices. **1 Points** - 1 to 2 years demonstrated experience and expertise in environmental management practices. **0 Points** - No experience and expertise in environmental management practices.	

	GIS Projects	•Technical skills to develop maps and other spatial information. •Geographical information handling, analysis, and interpretation skills; and •Understanding of GIS applications and spatial data queries.	Number of years of demonstrated experience and expertise in GIS projects of a similar scale and nature		**3 Points** - 5 or more years demonstrated experience and expertise in GIS projects of a similar scale and nature . **2 Points** - 3 to 4 years demonstrated experience and expertise in GIS projects of a similar scale and nature. **1 Points** - 1 to 2 years demonstrated experience and expertise in GIS projects of a similar scale and nature. **0 Points** - No experience and expertise in GIS projects of a similar scale and nature.	
	Property/Urban Economist	•Proven experience in urban economics, property market analysis, and feasibility studies. •Proven Experience in retail analysis, land use yield modelling, and development incentives. •Proven knowledge and understanding of economic studies, Property market analysis, Rental rates, vacancy rates, capitalisation rates, development feasibility and incentive mechanisms and experience in similar projects as per the terms of reference. •Ability to utilise existing policies pertinent to economic and regional development to supplement the LSDF. •Experience in urban development, the economics of development regulations and public-private partnerships. •Understanding of local government's role within the regional economy as well as the main cross-border relationships with adjacent municipalities. •Demonstrated understanding of the relationships between various economic variables and the environmental, social and infrastructure contexts; and •The ability to offer innovative solutions to address any relevant issues identified in the municipal area.	Number of years of demonstrated experience and expertise in in urban/ property economic development		**3 Points** - 5 or more years demonstrated experience and expertise in urban/ property economic development. **2 Points** - 3 to 4 years demonstrated experience and expertise in urban/ property economic development. **1 Points** - 1 to 2 years demonstrated experience and expertise in urban/ property economic development. **0 Points** - No experience and expertise in urban/ property economic development.	

STAGE 2: FUNCTIONALITY EVALUATION: FUNCTIONAL RESPONSIVENESS

Ref: Par. In ToR	FUNCTIONAL CRITERIA	ITEM DESCRIPTION	DELIVERABLE	Adherence		Max Score
19.2	2. INTERPRETATION OF THE TERMS OF REFERENCE AND QUALITY OF THE METHODOLOGY AND PROJECT PLAN PRESENTED		Information Required (to be tabulated herein)	Bid Proposal	Scoring Method	30 0

2; 3; 4;5 19.2	**Understanding of scope of work**	The proposed methodology and project plan must set out an approach which responds to the proposed scope of work and articulates what the bidder is offering to provide. The bidder must set out their understanding of the objectives of the study, giving the stated and implied requirements, highlighting issues of importance, and explaining the technical approach that would be adopted to address these.	Project Plan detailing roll-out of the project including an organisational chart and work breakdown structure that complies with the scope of work. The Project Plan must demonstrate how the activities will be sequenced and managed to achieve the required objectives and outputs within the specified timeframe.		**20 Points** -Proposal indicates an excellent understanding of scope of work, giving the stated and implied requirements, highlighting issues of importance and explaining the proposed technical approach that would be adopted to address these and give a clear indication of deliverables provided in phased process **15 Points** - Proposal indicates a good understanding of scope of work, giving the stated and implied requirements, highlighting issues of importance and explaining the proposed technical approach that would be adopted to address these and give a clear indication of deliverables provided in phased process **5 Points -** Proposal demonstrates a poor understanding of scope of work and requirements and issues of importance and provides limited information on the technical approach to be adopted **0 Points** - Proposal does not reflect the implied requirements of scope of work and/or explain the proposed technical approach and/or reflects no issues of importance	
	A clear indication of deliverables	The bidder must provide a clear indication of the deliverables to be produced throughout the project. Deliverables must be clearly defined, measurable and linked to the requirements and objectives of the scope of work. The bidder must demonstrate how each deliverable will be achieved, including the key activities, methodology, inputs, analysis and/or consultation required, as applicable. The proposed deliverables must be appropriately sequenced and demonstrate a logical progression from the commencement of the project through to completion. The bidder must also indicate the expected timing, responsible person/team and quality assurance or review process for each deliverable, where applicable.	Project Plan detailing roll-out of the project including an organisational chart and work breakdown structure that complies with the scope of work. The bidder must clearly identify the deliverables associated with each phase or activity of the project and explain the approach that will be followed to achieve each deliverable.		**10 Points** -An excellent indication of deliverables provided that is in line with the guidelines for the drafting of MSDFs. **3 Points** - A poor indication of deliverables with little cognizance taken of the Guidelines for the drafting of MSDFs **0 Points** - No indication of deliverables included, and no cognizance taken of the Guidelines for the drafting of MSDFs	

STAGE 2: FUNCTIONALITY EVALUATION: FUNCTIONAL RESPONSIVENESS

Ref: Par. In ToR	**FUNCTIONAL CRITERIA**	**ITEM DESCRIPTION**	**DELIVERABLE**	**Adherence**		**Max Score**
2; 3; 4; 5; 6; 7; 8; 10; 19.2; 20 etc	**3. ABILITY TO DELIVER EXPECTED PRODUCT WITHIN TIMEFRAMES STIPULATED**		**Information Required (to be tabulated herein)**	**Bid Proposal**	**Scoring Method**	**20** **0**

	Work breakdown structure	A detailed breakdown of the various tasks and subtasks required to complete the project. The work breakdown structure must indicate the sequencing and dependencies between activities, estimated time allocation, resources required, major activities, key milestones and expected outputs. It must demonstrate how the individual activities contribute to achieving the overall objectives and deliverables of the project and must be aligned with the proposed project timeframe and cash flow expectations, where applicable.	Project Plan detailing the roll-out of the project, including an organisational chart and work breakdown structure that complies with the scope of work. The work breakdown structure must clearly identify the tasks, subtasks, responsible resources, timeframes, dependencies, milestones and outputs required to complete the project. The bidder must provide a Gantt chart or equivalent project scheduling tool illustrating the proposed sequencing and duration of activities, key milestones, dependencies and overall project timeframe. The Gantt chart must correspond with the work breakdown structure and demonstrate a logical and achievable programme for completion of the scope of work.		**10 Points** - An excellent and detailed work breakdown structure provided indicating tasks, resources allocated and timeframes applicable **5 Points** - An acceptable work breakdown structure is provided but does not indicate all tasks, resources allocated and timeframes applicable **2 Points** - A poor work breakdown structure is provided and does not indicate all tasks, resources allocated and timeframes applicable **0 Points** - No work breakdown structure is provided	
	Schedule of team members	A schedule of project team members allocated to the project, including their names, positions/designations, roles and responsibilities, level of involvement and estimated hours allocated to the project. Where applicable, the schedule must also indicate the hourly rates inclusive of VAT. The submission must clearly demonstrate that the proposed team has the appropriate capacity and allocation of resources to undertake the required work and achieve the proposed deliverables within the specified timeframe.	Project Plan detailing the roll-out of the project, including an organisational chart and work breakdown structure that complies with the scope of work. The submission must include a list of all personnel who will be involved in the project, their respective roles and responsibilities, level of involvement and allocation of time to the project.		**5 Points** - Detailed schedule of all team members provided **2 Points** - An acceptable schedule of team members is provided but does not provide sufficient detail **0 Points** - No schedule of team members is provided	
	Breakdown of budget	A detailed breakdown of the proposed project budget corresponding with the activities, tasks and resources identified in the project plan. The budget must clearly indicate the allocation of costs to the various project activities and/or deliverables and, where applicable, the timing of expenditure, milestones and expected payments. The proposed budget must demonstrate a clear and logical relationship between the scope of work, work breakdown structure, resource allocation, project timeframes and cash flow/payment expectations.	Project Plan and financial proposal detailing the proposed allocation of costs against the project activities and/or deliverables. The submission must provide a clear budget breakdown and, where applicable, a cash flow and/or payment schedule that corresponds with the proposed project programme and milestones.		**5 Points** - An excellent and detailed breakdown of budget and cash flow / payment schedule provided **2 Points** - An acceptable breakdown of budget and/or cash flow / payment schedule provided **0 Points** - No breakdown of budget and no cash flow / payment schedule indicated	
TOTAL SCORE FUNCTIONAL CRITERIA MAX 80						
Failure to comply with qualification criteria will disqualify the bidder from proceeding to the functionality, price and preference evaluation						
A score of less than 64 out of a possible 80 will be considered as an unresponsive tender and will not be considered for the price and preference evaluation stage.						