

BID: GEORGE MUNICIPALITY APPOINTMENT OF A SERVICE PROVIDER TO PREPARE A COST-BENEFIT ANALYSIS AND A LEASING MODEL FOR THE LEASE OF INVESTMENT PROPERTIES
SCHEDULE 1

Subject to Terms of Reference (TOR) attached

QUALIFYING CRITERIA		ITEM DESCRIPTION AND DELIVERABLE	Yes	No	Inter-Quota	Notes
4.1.1	The Service Provider must be a registered Professional Company in a field relevant to the Scope of Work and the skills listed in Table 1 of the TOR and Normal of best practice work.	Name of Company: _____ Company Registration No: _____ Company Registration Certificate attached: _____ Field of Work: _____ Yes/No: _____ Reference to Scope of Work: _____ More than 5 years in operation (Company or Parent company): _____ Yes/No: _____	Proceed to Functional Evaluation	Disqualification		
4.1.2	Project Lead (Responsible person) professionally registered, with more than 10 years experience in the professional field	Name of Responsible Person (Project Lead): _____ Professional Registration Number: _____ Registration attached: _____ Field of Work: _____ Yes/No: _____ More than 10 years experience: _____ Yes/No: _____	Proceed to Functional Evaluation	Disqualification		
FUNCTIONAL EVALUATION						
4.2	FUNCTIONAL CRITERIA	ITEM DESCRIPTION AND DELIVERABLE	Criteria	Max Score	Form Refer	
CRITERIA 1: QUALIFICATION OF CONSULTANT/FIRM						
4.2.1 Project Lead						
4.2.1(a)	Property Finance related or Market Study qualification	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 2 Yes (Other accredited qualification) = 1 No (experience not included) = 0	10		
4.2.1(b)	Project management qualification (property and/or financial planning related)	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 2 Yes (Other accredited qualification) = 1 No (experience not included) = 0	10		
Criteria 1 Sub-Score 1.1 (Max 20)						
4.2.1.1	Other Specialist	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 10 Yes (Other accredited qualification) = 3 No (experience not included) = 0	10		
4.2.1.2	Property Finance/Property Market Study	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 2 Yes (Other accredited qualification) = 1 No (experience not included) = 0	2		
4.2.1.3	Municipal Finance/Administration related specialist	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 2 Yes (Other accredited qualification) = 1 No (experience not included) = 0	2		
4.2.1.4	Other Relevant Specialist	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 2 Yes (Other accredited qualification) = 1 No (experience not included) = 0	2		
4.2.1.5	Other Relevant Specialist	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 2 Yes (Other accredited qualification) = 1 No (experience not included) = 0	2		
Criteria 1 Sub-Score 1.2 (Max 10)						
4.2.1.6	Legal (property lease/agreements related)	Name: _____ Qualification: _____ Field of Expertise/role in project: _____ Registration attached: _____ Yes/No: _____	Yes (Bachelor's degree) = 10 No (experience not included) = 0	10		
Criteria 1 Sub-Score 1.3 (Max 10)						
CRITERIA 2: EXPERIENCE IN INVESTMENT PROPERTY						
4.2.2	Field of Expertise (See TOR and Table 2)	Typical Service	Information on each relevant project to be included below	Scoring Method * See below	Max Score	
4.2.2 (a)	Project Manager and Lead consultant experience	The service provider should have experience in conducting investment property market studies and a demonstrated understanding of the interaction between property markets and economic indicators, and/or	Project Name: _____ Project Location: _____ Client Name & Contact: _____ Project Description and Deliverables: _____ Timeframe (year and period): _____ Specialist (from Service Provider's list) involved in project and role: _____ CV (Personal/Specialist): included: _____ Yes/No Specialist: _____ years relevant experience: _____		10	
4.2.2 (b)	Project Manager and Lead consultant experience	Experience in land development packaging/agreements involving municipalities and investors/developers to be specifically highlighted.	Project Name: _____ Project Location: _____ Client Name & Contact: _____ Project Description and Deliverables: _____ Timeframe (year and period): _____ Specialist (from Service Provider's list) involved in project and role: _____ CV (Personal/Specialist): included: _____ Yes/No Specialist: _____ years relevant experience: _____		10	
4.2.2 (c)	Expertise in the functioning of residential and other property markets	Demonstrable experience in conducting research into property markets in South Africa, with a focus on affordability and factors influencing investment property markets. Technical skills in analysing spatial, economic and property market data.	Project Name: _____ Project Location: _____ Client Name & Contact: _____ Project Description and Deliverables: _____ Timeframe (year and period): _____ Specialist (from Service Provider's list) involved in project and role: _____ CV (Personal/Specialist): included: _____ Yes/No Specialist: _____ years relevant experience: _____		10	
4.2.2 (d)	Technical Data analysis/property research experience	Experience in collection of property and property value data and detailed spatial analysis of property market data, with a demonstrated ability to work with South African deeds registry data.	Project Name: _____ Project Location: _____ Client Name & Contact: _____ Project Description and Deliverables: _____ Timeframe (year and period): _____ Specialist (from Service Provider's list) involved in project and role: _____ CV (Personal/Specialist): included: _____ Yes/No Specialist: _____ years relevant experience: _____		10	
4.2.2 (e)	Property Finance specialist experience	The service provider should illustrate experience in financial viability (operational) studies, specifically relating to rental, in a variety of land development types/hypotheticals (commercial/residential, etc.). Experience in Public Private Partnerships to be illustrated. Experience in completing a Property/land lease vs sale analysis and/or land lease model to be specifically highlighted.	Project Name: _____ Project Location: _____ Client Name & Contact: _____ Project Description and Deliverables: _____ Timeframe (year and period): _____ Specialist (from Service Provider's list) involved in project and role: _____ CV (Personal/Specialist): included: _____ Yes/No Specialist: _____ years relevant experience: _____		10	
4.2.2 (f)	Knowledge / expertise relating to property development agreements	Experience in developing / overseeing the drafting of Public-Private Partnership agreements to be shown. Involvement in drafting related multi-party lease/lease agreements must be highlighted. Experience in completing a Property/land lease vs sale analysis and/or land lease model to be specifically highlighted.	Project Name: _____ Project Location: _____ Client Name & Contact: _____ Project Description and Deliverables: _____ Timeframe (year and period): _____ Specialist (from Service Provider's list) involved in project and role: _____ CV (Personal/Specialist): included: _____ Yes/No Specialist: _____ years relevant experience: _____		10	
CRITERIA 2 Total Score: (Max 60)						
4.3	FUNCTIONAL CRITERIA	ITEM DESCRIPTION AND DELIVERABLE	Criteria	Max Score	Form Refer	
CRITERIA 3: FUNCTIONAL CRITERIA 3: INTERPRETATION OF THE TERMS OF REFERENCE AND QUALITY OF THE PROPOSAL						
4.3.1	Team	Service provider understands the brief/requirements and deliverables as per Scope and Deliverables, and provides a clear indication and understanding of what the bidder is offering to provide (process and product). Quality/level of understanding of scope of work, methodology, timelines and deliverables to be described.	Excellent understanding stated and implied requirements, explaining proposed methodology/technical approach, timelines & deliverables = 20 points Good understanding, stated and implied requirements, explaining proposed methodology/technical approach, timelines & deliverables = 15 points Poor understanding, stated and implied requirements, explaining proposed methodology/technical approach, timelines & deliverables = 0 points	20		
CRITERIA 3 Total Score: (Max 20)						
TOTAL SCORE (FUNCTIONAL CRITERIA 1.2 AND 3) (Max 100)						
SCORE SCALE						
A score of less than 80 points out of a possible 100 points will be considered as exceptional and will not be considered for price and performance						
* Scoring Method: Criteria 2						
a. Degree to which the listed project histories relevant to the described typical services						
b. Experience in Land Development/Investment Properties (highlighted)						
c. Specialist more than 7 years experience (CV has to be attached)						
d. In all instances clients may be contacted to confirm details						

* Scoring Method: Criteria 2
a. Degree to which the listed project histories relevant to the described typical services
b. Experience in Land Development/Investment Properties (highlighted)
c. Specialist more than 7 years experience (CV has to be attached)
d. In all instances clients may be contacted to confirm details