

PRE-QUALIFICATION AND EVALUATION SCORING (Draft 5_31102022)

Relevant to Terms of Reference 31102022

ANNEXURE B

QUALIFICATION TO TENDER

Ref. Par. In ToR	QUALIFYING CRITERIA	ITEM DESCRIPTION	TENDER DELIVERABLE: To be completed by bidder as part of tender submission	Yes	No
11.1.1	Service Provider (Lead Company)	The service provider must be a registered professional company	Company Name: _____ Company Registration Nr: _____ Relevant Professional Field (Company): _____ Company Registration Confirmation attached _____ 1_Yes/No Person responsible for project employed/part of company: Name _____ Position: _____, Field of expertise: _____	Proceed to Functional Evaluation	Disqualification
11.1.2	(a) Registered heritage practitioner (person)	The person responsible for the heritage component of the project must be a registered Heritage Practitioner - registered with the Association of Professional Heritage Practitioners.	Name of Heritage Practitioner: _____ Professional Registration Nr: _____ Professional Registration Confirmation attached _____ Yes/No Relationship between heritage practitioner and lead company: _____	Proceed to Functional Evaluation	Disqualification
11.1.2	(b) Experienced project professional: heritage practitioner	The responsible person (heritage practitioner) must have at least five years experience in the field	Years of Experience in the field: _____ (5 years and more=yes; less than 5 years = No) Professional CV attached _____ Yes/No	Proceed to Functional Evaluation	Disqualification
11.1.3	Project team: Supportive professional services (contracted or in-house) required to complete all deliverables, in addition to the heritage practitioner	Professional Town Planner/ Professional Architect/ Urban Designer	Name(s): _____ Field: _____ _____ Field _____ Field _____	Proceed to Functional Evaluation (names of at least one support professional noted)	Disqualification
11.1.4	Geographic Information System (GIS) capability	Capacity and experience to deliver the project deliverables by way of spatial representation in a format compatible with the municipal GIS System	GIS / GIS compatible software: Name program: _____ Confirmation of capability to provide all spatial components in the Scope of Works in GIS compatible format _____ Yes/No	Proceed to Functional Evaluation (names included in all categories/files)	Disqualification

ANNEXURE C

FUNCTIONALITY EVALUATION: EXPERIENCE AND CAPACITY

Ref. Par. In ToR	FUNCTIONAL CRITERIA	ITEM DESCRIPTION	DELIVERABLE	Criteria	Max Score
13.4.1	CRITERION 1: RELEVANT EXPERIENCE AND CAPACITY OF THE BIDDER/SERVICE PROVIDER		Information Required (to be tabulated herein)	Scoring Method	160
		Functionality Criterion 1.1: Experience of the Service Provider			110
	Criterion 1.1.1. Relevance of experience of the Service Provider (and professionals in team) in completing the heritage component reflected in the Scope of Work (See ToR)	See ToR 13.4.1 (f) The experience of the bidder in completing the heritage component of the projects to provide the project deliverables to fulfill the Scope of Work . (Example pages/documents should be attached. (Documents/examples of more than one example can be attached, but the details of the three most relevant projects to be noted in this schedule)	Statements (filled in below) illustrating most relevant projects (maximum 4) in the project field, including the following information on each project: 1.1.1: PROJECT 1 Project name: _____ Project locality and spatial extent: _____ Client & contact: _____ Description (extent and deliverables to illustrate relevance to tender project scope) Document reference: (Title): _____ Role of service provider in project: _____ Total heritage study (input/actions) related fees: _____ Timeframe (Year & period): _____ 1.1.1: PROJECT 2 Project name: _____ Project locality and spatial extent: _____ Client & contact: _____ Description (extent and deliverables to illustrate relevance to tender project scope) Document reference: (Title): _____ Role of service provider in project: _____ Total heritage study (input/actions) related fees: _____ Timeframe (Year & period): _____ 1.1.1: PROJECT 3 Project name: _____ Project locality and spatial extent: _____ Client & contact: _____ Description (extent and deliverables to illustrate relevance to tender project scope) Document reference: (Title): _____ Role of service provider in project: _____ Total heritage study (input/actions) related fees: _____ Timeframe (Year & period): _____	Points allocated on relative relevance, extent of projects and level of involvement. Maximum 20 points per listed project:	60
13.4.1	Criterion 1.1.2. Experience of the Service Provider in combining heritage	The experience of the team (persons) supporting the service provider in work completed-similar to the function required in	Statement (completed below) illustrating compliance with Criterion 1.1.2 1.1.2: PROJECT 1 Project name: _____	Points allocated on relative relevance, extent of projects and level of involvement. Maximum 10 points per listed project	20

PRE-QUALIFICATION AND EVALUATION SCORING (Draft 5_31102022)

	<p>and urban design processes on a relatively large scale</p>	<p>the scope of works (same projects as listed in Criteria.1.1 may be used, if applicable), but description to clearly illustrate urban design interpretation of heritage aspect. (Example pages/documents should be attached. (Documents/examples of more than one example can be attached, but the details of the two most relevant projects to be noted in this schedule)</p>	<p>Project locality: Client & contact: Description (extent and deliverables to illustrate relevance to tender project scope insofar as urban design and heritage aspects are combined in projects similar to the stated scope of works)</p> <hr/> <p>Document reference: (Title): Role of service provider in project: Timeframe (Year & period):</p> <p>1.1.2: PROJECT 2 Project name: Project locality: Client & contact: Description (extent and deliverables to illustrate relevance to tender project scope insofar as urban design and heritage aspects are combined in projects similar to the stated scope of works)</p> <hr/> <p>Document reference: (Title): Role of service provider in project: Timeframe (Year & period):</p>		
<p>13.4.1</p>	<p>Criterion 1.1.3. Experience of the Service Provider in combining heritage requirements/aspects in strategic planning policy (municipal)</p>	<p>The experience of the team (persons) supporting the service provider in work completed-similar to the function required in the scope of works (same projects as listed in Criteria.1.1 may be used, if applicable), but description to clearly illustrate how heritage aspects are treated/aligned/absorbed into planning policy at municipal level</p>	<p>Statement (Fields below to be completed) illustrating compliance with Criterion 1.1.3</p> <p>1.1.3: PROJECT 1 Project name: Project locality: Client & contact: Description (extent and deliverables to illustrate relevance to tender project scope insofar as heritage aspects are combined with strategic planning/policy at municipal level, in projects similar to the stated scope of works.</p> <hr/> <p>Document reference: (Title): Role of service provider in project: Timeframe (Year & period):</p> <p>1.1.3: PROJECT 2 Project name: Project locality: Client & contact: Description (extent and deliverables to illustrate relevance to tender project scope insofar as heritage aspects are combined with strategic planning/policy at municipal level, in projects similar to the stated scope of works.</p> <hr/> <p>Document reference: (Title): Role of service provider in project: Timeframe (Year & period):</p>	<p>Points allocated on relative relevance, extent of projects and level of involvement. Maximum 10 points per listed project:</p>	<p>20</p>
	<p>Criterion 1.1.4. Experience of the Service Provider in communicating heritage aspects to stakeholders</p>	<p>The experience of the team (persons) supporting the service provider in communicating heritage aspects (elements/ plan implementation/ principles/guidelines/etc) to stakeholders</p>	<p>1.1.4: PROJECT 1 Project name: Project locality: Client & contact: Description (process, presentaton elements, extent (number of engagements and parties engaged) and deliverables (presentation products) to illustrate experience in communicating heritage aspects (similar to elements of scope of work) to the public/interest/affected groups and obtaining their input.</p> <hr/> <p>1.1.4: PROJECT 2 Project name: Project locality: Client & contact: Description (process, presentaton elements, extent (number of engagements and parties engaged) and deliverables (presentation products) to illustrate experience in communicating heritage aspects (similar to elements of scope of work) to the public/interest/affected groups and obtaining their input.</p>	<p>Two project illustrating communication on an area wide basis (more than one neighborhood), using creative communication techniques: 10 points One project illustrating communication on an area wide basis (more than one neighborhood), using creative communication techniques: 5 points Project(s) illustrating communication using creative communication techniques: 5 points</p>	<p>10</p>
<p>13.4.2</p>	<p>Functionality Criterion 1.2: Capacity of the Service Provider</p> <p>Criterion 1.2.1 Capacity of the Service Provider in presenting and completing a heritage related project of this extent (municipal wide strategy) (May be same project than listed for Criteria 1.1)</p>	<p>To illustrate that the team (Persons/service provider) technical and administrative capacity is sufficient to complete the project</p>	<p>Project name: Description of Extent (see points catagories): Project locality: Client & contact: Role of service provider in project:</p>	<p>Municipal/district/provincial wide basis =40 points. Neighborhood wide basis (more than four urban blocks) =40 points. Erf(ven) basis (less than four urban blocks)= 5 points</p>	<p>40</p>

PRE-QUALIFICATION AND EVALUATION SCORING (Draft 5_31102022)

			Project Value (Heritage and related urban design/planning/participation components only):		
			Timeframe (Year & period):		
Criterion 1.2.2 Capacity of the Service Provider in collecting data	The service provider to illustrate which heritage data they have access to and which they are capable to access at no additional cost to the Municipality	Source 1: _____ Available or to be accessed (mark option)	Five or more sources noted (10 points) Two to four sources noted (5 points) Less than two (points)	10	
		Source 2: _____ Available or to be accessed (mark option)			
		Source 3: _____ Available or to be accessed (mark option)			
		Source 4: _____ Available or to be accessed (mark option)			
		Source 5: _____ Available or to be accessed (mark option)			

ANNEXURE D

FUNCTIONALITY CRITERIA: PROJECT UNDERSTANDING AND METHODOLOGY

13.4.3	CRITERION 2: PROJECT UNDERSTANDING, APPROACH AND INNOVATION	Information Required. Response to be attached as marked	Scoring Method	60	
	Criterion 2.1: Understanding of project and project			40	
	Project Understanding	Service provider to illustrate an understanding of the project intent (Scope)	Write -up (Maximum one page) stating the service provider's understanding of the final product and how it will be used- to be attached to submission, included in document marked as Technical Proposal (can be part of covering pages).	Excellent understanding, illustrating the creating of a strategy which includes definable elements to work towards a phased, overall heritage plan for George, placing the official heritage preservation process in the overall project and how the project will contribute to the creation of urban sense of place = 50 points	40
				Good understanding, illustrating the creating of a strategy which includes definable elements to work towards a phased, overall heritage plan for George, placing the official heritage preservation process in the overall project, how the project will contribute to the creation of urban sense of place and how the overall plan may be rolled out = 30 points	20
				Poor understanding, illustrating the creating of a strategy which includes definable elements to work towards a phased, overall heritage plan for George and placing the official heritage preservation process in the overall project = 10 points	5
13.4.3	Criterion 2.2: Methodology			20	
	Process understanding	Service provider to illustrate an understanding of the project process/ approach to the project	Draft project workplan (maximum 1 page) to be submitted, to be included in the submission document marked Technical Proposal (what will be done, by when and by whom) (can be part of covering pages)	Excellent understanding, stated and implied requirements(all deliverables to be noted), illustrating proposed methodology/technical approach, timelines & deliverables = 30 points	20
				Good understanding, stated and implied requirements(all deliverables to be noted), illustrating proposed methodology/technical approach, timelines & deliverables = 30 points	10
				Poor understanding, stated and implied requirements(all deliverables to be noted), illustrating proposed methodology/technical approach, timelines & deliverables = 30 points	0
TOTAL SCORE (FUNCTIONAL CRITERIA 1 AND 2) MAX 270					

Strategy to identify actions and related projects for which funding can be sourced - Framework for coordinated separate appointment slater

Failure to comply with qualification criteria will disqualify the bidder from proceeding to the functionality, price and preference evaluation

A score of less than 150 out of a possible 210 will be considered as an unresponsive tender and will not be considered for the price and preference evaluation stage.

ANNEXURE E

TOTAL PRICE OFFERED

Table A: Cost component per deliverable

Total Time Based Fees, including all resources/personell				
Deliverable	Resources included	Estimated Hours	Rate / hour	Sub Total (Excluding VAT)
1 Inception Report/Work Plan			Hrs R	R
2 Status Quo and draft Heritage Strategy (all areas) and Implementation Plan (Heritage Strategy Baseline and Action Plan)				
3 Final Heritage Strategy (all areas) and Implementation Plan (Heritage Strategy Baseline and Action Plan)				
4 Draft Phase 1: Demarcated Heritage Precincts (two areas)				
5 Phase 1: Demarcated Heritage Precincts (two areas)				
6 Guidelines for Development in the identified precincts (Phase 1).				
7 Alignment between planning- and heritage strategy and process.				
8 Stakeholder consultation and input register				
Total Fee Offered on this Project (Excluding VAT) Carried Forward to Table C				R

Table B: Recoverable Expenses

Confirmation of budget required for Recoverable Expenses	% of Fee	Amount
Budget allowance accepted		R
Total Offered Recoverable Expenses on this Project (Excluding VAT) Carried Forward to Table C		

Table C: Offered fee/cost summary

Tender:Price components	(B/F) From Table	Tendered Fees
1 Total Offered Professional Fees	A	R
2 Total Offered Recoverable Expenses	B	R
Sub - Total		R
Add 15 % VAT		R

PRE-QUALIFICATION AND EVALUATION SCORING (Draft 5_31102022)

	Total Budget Requirement (Including VAT) for Project noted in Terms of Reference		
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Table D: Fee per professional/project support members (Complete only if professional/personnel is included in the team of the Service Provider)*

	Individual team member	Rate per Hour (Excl VAT)*
	Professional Heritage Practitioner	
	Professional Architect	
	Professional Urban Designer	
	Professional Town Planner	
	Administrative personnel	
	Draughtsman	
	GIS practitioner	

* Fees provided for base reference and evaluation purposes only. Appointment to be based on Table E submission detail

Preference Evaluation as per SCM format