

EVALUATION SCHEDULE

PRE-QUALIFICATION AND FUNCTIONALITY EVALUATION SCORING

Relevant to Terms of Reference

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, marked as Attachment 11.1.1 | Proceed to Functional Evaluation | Disqualification |
| 11.1.2 | (a) Registered heritage practitioner (person) | The person responsible for 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 | Proceed to Functional Evaluation | Disqualification |
| 11.1.2 | (b) Experienced project professional | 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: _____ Name: _____ | Proceed to Functional Evaluation (names included in all categories/files) | 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 |
| 11.1.5 | Visual representation of deliverables | The service provider must be able to provide visual representation/content to communicate the strategy and precinct planning and guidelines to facilitate inclusion in a brochure format. Capacity and experience to provide input to communication material to be confirmed | Software: _____ Confirmation of capability to provide required visual representation of concepts related to the Scope of Works in a format which can be electronically transferred to the municipality _____ Yes/No | | |

ANNEXURE C

FUNCTIONALITY EVALUATION: EXPERIENCE AND CAPACITY

| Ref: Par. In ToR | FUNCTIONAL CRITERIA | ITEM DESCRIPTION | DELIVERABLE | Criteria | Max Score |
|------------------|--|---|---|---|------------|
| 13.3.1 | CRITERION 1: RELEVANT EXPERIENCE AND CAPACITY OF THE BIDDER/SERVICE PROVIDER | | Information Required (to be tabulated herein) | Scoring Method | 210 |
| | | | Functionality Criterion 1.1: Experience of the Service Provider | | 160 |
| | Criterion 1.1.1. Relevance of experience of the Service Provider in completing the heritage component reflected in the Scope of Work (See ToR 13.3.1(f)) | See ToR 13.3.1 (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. | 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): | Points allocated on relative relevance, extent of projects and level of involvement. Maximum 20 points per listed project: | 80 |

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| | | | <p>Role of service provider in project:</p> <p>Total heritage study (input/actions) related fees:</p> <p>Timeframe (Year & period):</p> <p>1.1.1: PROJECT 3</p> <p>Project name:</p> <p>Project locality and spatial extent:</p> <p>Client & contact:</p> <p>Description (extent and deliverables to illustrate relevance to tender project scope)</p> <p>Document reference: (Title):</p> <p>Role of service provider in project:</p> <p>Total heritage study (input/actions) related fees:</p> <p>Timeframe (Year & period):</p> <p>1.1.1: PROJECT 4</p> <p>Project name:</p> <p>Project locality and spatial extent:</p> <p>Client & contact:</p> <p>Description (extent and deliverables to illustrate relevance to tender project scope)</p> <p>Document reference: (Title):</p> <p>Role of service provider in project:</p> <p>Total heritage study (input/actions) related fees:</p> <p>Timeframe (Year & period):</p> | | |
| <p>13.3.1</p> | <p>Criterion 1.1.2. Experience of the Service Provider in combining heritage and urban design processes on a relatively large scale</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 urban design interpretation of heritage aspect</p> | <p>Statement (icompleted below) illustrating compliance with Criterion 1.1.2</p> <p>1.1.2: PROJECT 1</p> <p>Project name:</p> <p>Project locality:</p> <p>Client & contact:</p> <p>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> <p>Document reference: (Title):</p> <p>Role of service provider in project:</p> <p>Timeframe (Year & period):</p> <p>1.1.2: PROJECT 2</p> <p>Project name:</p> <p>Project locality:</p> <p>Client & contact:</p> <p>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> <p>Document reference: (Title):</p> <p>Role of service provider in project:</p> <p>Timeframe (Year & period):</p> | <p>Points allocated on relative relevance, extent of projects and level of involvement. Maximum10 points per listed project</p> | <p>40</p> |
| <p>13.3.1</p> | <p>Criterion 1.1.3. Experience of the Service Provider zoning and overlay processes</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</p> | <p>Statement (Fields below to be completed) illustrating compliance with Criterion 1.1.3</p> <p>1.1.3: PROJECT 1</p> <p>Project name:</p> <p>Project locality:</p> <p>Client & contact:</p> | <p>Points allocated on relative relevance, extent of projects and level of involvement. Maximum10 points per listed project:</p> | <p>20</p> |

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| | | <p>may be used, if applicable), but description to clearly illustrate that the team will be able to complete the zoning process</p> | <p>Description (extent and deliverables to illustrate relevance to tender project scope insofar as the zoning and overlay process is concerned).</p> <hr/> <p>Document reference: (Title):</p> <p>Role of service provider in project:</p> <p>Timeframe (Year & period):</p> <p>1.1.3: PROJECT 2</p> <p>Project name:</p> <p>Project locality:</p> <p>Client & contact:</p> <p>Description (extent and deliverables to illustrate relevance to tender project scope insofar as the zoning and overlay process is concerned).</p> <hr/> <p>Document reference: (Title):</p> <p>Role of service provider in project:</p> <p>Timeframe (Year & period):</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</p> <p>Project name:</p> <p>Project locality:</p> <p>Client & contact:</p> <p>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</p> <p>Project name:</p> <p>Project locality:</p> <p>Client & contact:</p> <p>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: 20 points One project illustrating communication on an area wide basis (more than one neighborhood), using creative communication techniques: 15 points Project(s) illustrating communication using creative communication techniques: 10 points</p> | <p>40</p> |
| <p>13.3.2 Functionality Criterion 1.2: Capacity of the Service Provider</p> | | | | | <p>50</p> |
| <p>Criterion 1.2.1 Capacity of the Service Provider in presenting and completing a project of this extent</p> | | <p>To illustrate that the team (Persons) and office capacity of the service provider is sufficient to complete the project</p> | <p>Confirmation of team's human resource capacity: Number of personell to support the project</p> <hr/> <p>Relevant professional and specialist (number of people and designation) (most relevant, to a maximum of 4)</p> <p>Name: _____ Designation _____</p> <p>Statement of relevant experience</p> <p>Name: _____ Designation _____</p> <p>Statement of relevant experience</p> <p>Name: _____ Designation _____</p> <p>Statement of relevant experience</p> <p>Name: _____ Designation _____</p> <p>Statement of relevant experience</p> <hr/> <p>Administrative personnel (number of people and designation) (most relevant, to a maximum of 4)</p> | <p>At least four available specialists dedicated to the project (See required specialists Par6 of Terms of Reference), of which two heritage specialist are available: 20 points At least three available specialists dedicated to the project (See required specialists Par 6 of Terms of Reference) : 10 points</p> <hr/> <p>At least four available administrative support personnel dedicated to the</p> | <p>40</p> |

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|---|--|---|--|--|--|
| | | | Name: _____ Designation _____ Statement of relevant experience | project, of which one is capable to do drawing/skeching, one is capable of GIS related functions, (can include specialits listed in Par 6 of the Terms of Reference): 20 points At least four available administrative support personnel dedicated to the project: 10 points | |
| | | | Name: _____ Designation _____ Statement of relevant experience | | |
| | | | Name: _____ Designation _____ Statement of relevant experience | | |
| | | | Name: _____ Designation _____ Statement of relevant experience | | |
| | | | Name: _____ Designation _____ Statement of relevant experience | | |
| | | | Name: _____ Designation _____ Statement of relevant experience | | |
| 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 the are capable to access at no additional cost to the Municipality | Source 1: _____ Available or to be accessed (mark option) 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) | Five or more sources noted (10 points) Two to four sources noted (5 points) Less than two (points) | 10 | |

ANNEXURE D

FUNCTIONALITY CRITERIA: PROJECT UNDERSTANDING AND METHODOLOGY

| | | | | | |
|--|--|---|--|--|-----------|
| 13.3.3 | CRITERION 2: PROJECT UNDERSTANDING, APPROACH | 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 . | Excellent understanding, illustrating the process of collecting data, obtaining input from roleplayers, completing the overlay process = 50 points | 40 |
| | | | | Good understanding, illustrating the process of collecting data, obtaining input from roleplayers, completing the overlay process = 30 points | 20 |
| | | | | Poor understanding, illustrating the process of collecting data, obtaining input from roleplayers, completing the overlay process = 10 points | 5 |
| 13.3.3 | Criterion 2.2: Methodology | | | | 20 |
| | Process understanding | Service provider to illustrate an understanding of the project process/ approach to the project | Project workplan to be submitted, to be included in the submission document marked Technical Proposal | 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 | | | | | |

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

A score of less than 190 out of a possible 270 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, including all resources/personell and disbursements

| Deliverable | Resources included | | Sub Total (Excluding VAT) | Sub Total (All Applicable Taxes Included) |
|---|--------------------|--|---------------------------|---|
| 1 Work Plan and Inception meeting. | | | | |
| 2 Survey, context study and review of existing information | | | | |
| 3 Draft Demarcation of Heritage Precincts (three areas) | | | | |
| 4 Draft Guidelines for Development in each of the identified precincts. | | | | |
| 5 Completed Overlay Zone process | | | | |
| 6 Final adoption of the Inventories of the three areas | | | | |
| 7 Final Overlay, Guidelines, Demarcation, including Stakeholder consultation and input register | | | | |
| 8 Project Close Out | | | | |

Total Fee Offered on this Project (Excluding VAT) Carried Forward to Table C

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Table B: 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