



SOUTH AFRICAN TOURISM

Delivered by e-mail

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RFQ-010-OCEO-2022

Dear Bidder

Subject Matter: Request for Quotation (RFQ) – Service provider to assist SA Tourism with the annual planning cycle for the FY23/24.

South African Tourism Board (SA Tourism) was established by section 2 of the Tourism Act, 1993 (Act No. 72 of 1993) and continues to exist in terms of section 9 of the Tourism Act, 2014 (Act No. 3 of 2014) as amended. SA Tourism is also Schedule 3 Part A public entity in terms of the Public Finance Management Act, 1999 (Act No. 1 of 1999).

SA Tourism is mandated in terms of the Tourism Act to provide for, amongst others, the development and promotion of sustainable tourism for the benefit of the Republic, its residents and its visitors. It is common cause that tourism is a key strategic industry in terms of The National Development Plan and the National Tourism Sector Strategy as it supports governments' objectives to alleviate the triple challenges of unemployment, poverty and inequality.

Section 217 of the Constitution of the Republic of South Africa, 1996, provides that goods and services must be contracted through a system that is fair, equitable, transparent, competitive and cost-effective and confers a constitutional right on every potential supplier to offer goods and services to the public sector when needed.

Having regard for the aforementioned SA Tourism is hereby extending an invitation to your firm, as part of an RFQ process, to submit a cost proposal for **Service provider to assist SA Tourism with the annual planning cycle for the FY23/24:**

Background and Scope of Work

The South African Tourism Board is a Schedule 3A public entity established in terms of Section 9 of the Tourism Act No. 3 of 2014. In addition to the legislative requirements espoused by the Tourism Act, corporate governance within SA Tourism Board is applied through adherence to the provisions of the Public Finance Management Act No. 1 of 1999 ("PFMA"), the King IV Report on Corporate Governance for South Africa, 2016 ("King IV"), the Public Entity Governance Protocol entered into between the Minister of Tourism and the SA Tourism Board, as well as any other applicable law or regulation.

Programme	Programme Description
Programme 1	Corporate Support To provide effective support services to the organisation, as well as ensure compliance with statutory requirements; and To ensure strategy development and integration with business performance monitoring, governance and evaluation.
Programme 2	Business Enablement To enhance collaboration with various stakeholders; and To provide centralised tourism intelligence to support evidence-based decision-making.
Programme 3	Leisure Tourism Marketing To create demand through travel acquisition and growing brand equity for South Africa as a leisure and business events destination, in identified markets.
Programme 4	Business Events To grow the nation's business events industry.
Programme 5	Tourist Experience To ensure the delivery of quality assured tourist/ visitor experiences, which are diverse, unique and enriched.

SA Tourism has the following business units which falls within the respective programmes listed above:

- a) Office of CEO including Value Chain Management, Corporate Communications, Strategic Planning, Evaluation and Programme Management (SPEPM) and Strategic Partnership Management.
- b) Office of CFO comprising Finance and Supply Chain Management
- c) Governance, Risk and Compliance
- d) Internal Audit
- e) DigiTech
- f) Analytics and Insights
- g) Human Capital including Facilities Management
- h) Tourism Execution including Regions and Hubs
- i) South African National Convention Bureau
- j) Brand and Marketing
- k) Visitor Experience including the Tourism Grading Council

Business Requirement

In terms of the statutory compliance requirements for planning purposes outlined in the PFMA including its Treasury Regulations, and the DPME Revised Framework for Strategic Plans and Annual Performance Plans including its Guidelines, SA Tourism is required to prepare, document and implement informed strategic and performance plans aligned to its mandate and guided by its founding legislation relating to its establishment. In accordance with these requirements, these plans must be supported by an appropriate budget proposal.

The business requirement, spanning the period June 2022 to March 2023, is as follows:

BUSINESS REQUIREMENT

DELIVERABLE

Development of a **roadmap that outlines the planning process and methodology that will be deployed** to ensure the delivery of the:

1. Revised Five-Year Strategic Plan
2. FY23/24 Annual Performance Plan
3. FY23/24 Annual Operational Plan
4. FY23/24 Divisional Operational Plans.

The planning roadmap, planning methodology, timelines and templates must be aligned to **regulatory and legislative frameworks and guidelines** which will be utilised during the different stages of the planning process.

Facilitate the review and development of the Revised Five-Year Strategic Plan.

Facilitate the annual planning process to produce the **first draft and final FY23/24 Annual Performance Plan** which is due in October 2022 and December 2022 respectively.

Facilitate the annual planning process to produce the **first draft and final FY23/24 Annual Operational Plan** which is due in October 2022 and December 2022 respectively.

Facilitate the divisional operational planning process that results in **FY23/24 Divisional Operational Plans** per business unit in support of the FY23/24 APP & AOP. The output in this regard will be business unit level operational plans that support delivery of the FY23/24 APP and AOP but that follows a coordinated approach across the business units in the organisation to avoid planning in silos. Divisional operational planning sessions will thus be required. The above requirements will include the **logistics and facilitating a number of planning sessions** at various levels of management including but not limited to the Board Lekgotla, Exco Lekgotlas/ Sessions, and Management Sessions. At least one of each session will be required, however, there may be additional sessions required at each level. **Engagement** with the Board through the Board Chairperson and the organisation through the Acting CEO will be key in delivering the above. This may require a number of engagements with the Board Chairperson, the Acting CEO and if required, the Board Members and Members of the SA Tourism Executive Management team. The process will also include a number of presentations of the key planning documents to the Board, the Exco and the organisation. It will also include **facilitation** of a number of meetings / workshops / sessions to ensure delivery of the planning documents. A draft planning roadmap is attached which guides the above (The Roadmap from GMF 2022 to GMF 2023).

Roadmap that outlines the planning process and methodology that will be deployed.

Templates for the revised Strategic Plan, Annual Performance Plan, Annual Operational Plan and Divisional Operational Plans.

Revised Five-Year Strategic Plan: 2020-2025

First draft FY23/24 Annual Performance Plan

Final FY23/24 Annual Performance Plan

First draft FY23/24 Annual Operational Plan

Final FY23/24 Annual Operational Plan

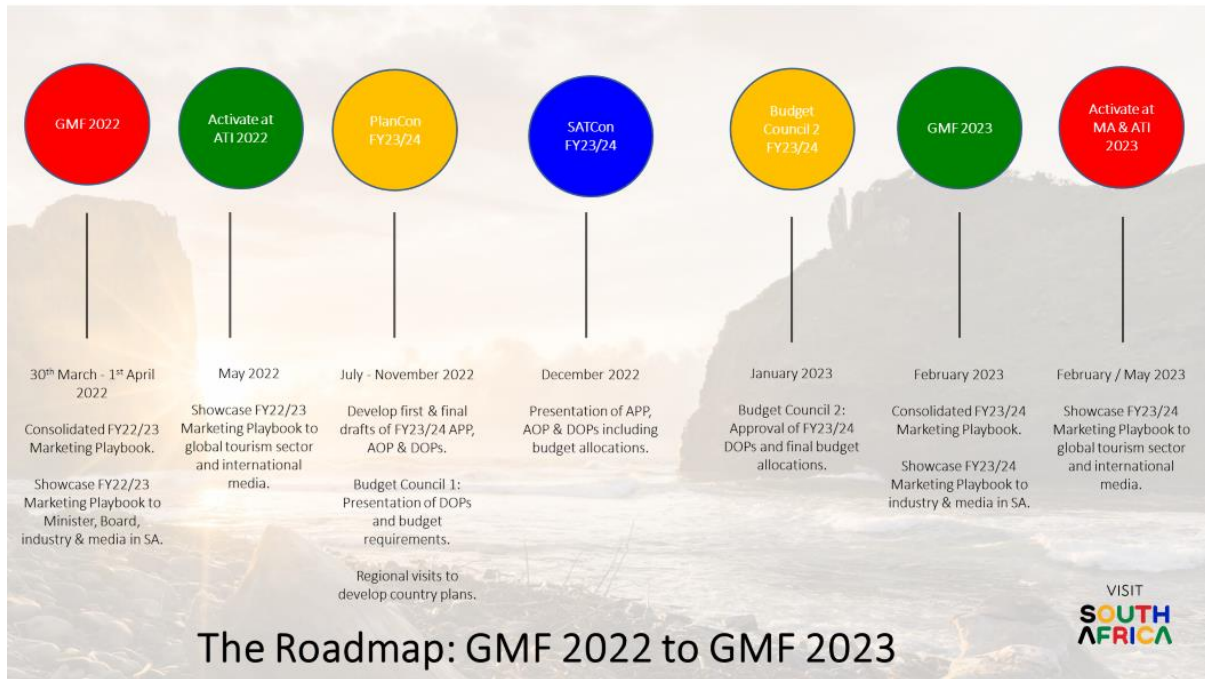
FY23/24 Divisional Operational Plans for each of the identified business units

Preparation for each planning session including development of agenda, facilitation of each session and production of key take-outs for each session.

Presentation of plans, in various stages, to the Board, Exco and the organisation at large.

The Roadmap from GMF 2022 to GMF 2023

The roadmap guides our planning cycle on an annual basis and includes the Global Marketing Forum, the inaugural GMF was hosted in March 2022.



South African Tourism Annual Planning Cycle

Time	Planning Element	Stakeholders
May	Post-Indaba Retrospective	Exco, Manco and Agencies
Early June	Mid-Term Review of Five-Year Strategic Plan + Leisure & Business Brand Trackers + AI Reports	Exco & Manco
June	High-level input into Revised Five-Year Strategic Plan & FY23/24 APP	Exco
July & August	In-Country Planning Sessions: Refine input into Revised Five-Year Strategic Plan, FY23/24 APP, AOP & DOPs PLANCON end August tbc	RGMs, AI & SPEPM
September	Business Unit Planning Sessions: Refine input into Revised Five-Year Strategic Plan, FY23/24 APP, AOP & DOPs	Exco & Manco
End September	Board Lekgotla: three day strategy session	Board and Exco
Early October	Exco Lekgotla: Review of draft FY23/24 APP, AOP & DOPs	Exco, Manco and Agencies
End October	Board approval of FY23/24 APP & AOP	Board and Exco
Early November	Agencies Briefing	Exco, Manco and Agencies
Mid-November	Budget Council # 1	Exco
End November	AG review of FY23/24 APP	SPEPM & IA
End November	Agencies First Revert	Exco, Manco and Agencies
Early December	APP, AOP & DOPs finalised SATCON 1-2 December tbc	Exco
Mid-December	Agencies Second Revert	Exco, Manco and Agencies
Early January	Final Agencies Revert	Exco, Manco and Agencies
Mid-January	Final Budget Council	Exco
End January	Agency Production	Agencies
February	GMF 2023: GMF 13-17 Feb & Board Workshop 20-21 February tbc	Exco, Manco, Hub Heads, Agencies, Board & Shareholder
End February	Board approval of final FY23/24 APP	Board and Exco
May	Travel Indaba (New body of work and marketing plan is launched)	Board, Exco, Agencies and industry

The GMF is an organisational initiative designed to ensure that South African Tourism consolidates and executes a single marketing plan for a financial year. The key objectives of the GMF are to:

1. Develop a consolidated global marketing playbook (plans per market, creative body of work and annual calendar) for a financial year. This marketing playbook is presented to the Board, and the Minister of Tourism as well as the tourism sector.
2. Provide a platform for engagement between Exco, Regional General Managers and Hub Heads who represent South African Tourism across the globe.

The Management Committee, Hub Heads, and the Executive Management Committee, together with key business partners, are invited to Headquarters, where SA Tourism undertakes an immersive deep dive into our business – a collaborative work through on our way forward and looking at how we progress on the road to recovery in a post pandemic environment.

Each business unit (BU) and Region is allocated an activation room to creatively bring their plans for the new fiscal to life. One aspect of the activation per BU / Hub is a presentation that focuses on the state of the market / BU including analytics and insights, the problem statement, the big things to be done in the new fiscal (maximum of 5), the annual calendar for the BU / market, budget requirements, key dependencies including the proposed role for the Board and the Minister.

Important Considerations in giving effect to the Business Requirements

Where possible, meetings / workshops / sessions will be held physically at venues that will be booked by SA Tourism. However, the option does exist to host hybrid and/or online platforms, depending on the risk adjusted strategy and related restrictions that may be in place at any point in time.

The service provider may be required to work with one of SA Tourism's agencies who may be appointed to work with the SPEPM team in planning for and hosting the GMF 2023 and PlanCon activations in support of the annual planning cycle.

Required Expertise

The selected service provider must demonstrate competence and qualifications for the scope of work in terms of detailed knowledge and experience in public sector organisational performance planning. Interested companies must be able to demonstrate measurable success in:

- Solid knowledge of and in-depth experience in implementing the prevailing and guiding government regulatory frameworks and guidelines for annual strategic planning and the production of annual performance plans, including operational planning.
- Solid experience in developing strategies to deliver on the organisational mandate.
- Extensive experience in the development of organisational annual performance plans and operational plans within the public sector.
- Extensive experience in working within the tourism industry and within the public sector.
- Significant experience in designing and implementing solutions to the elements listed in the scope of work

1. Format of proposal

1.1 Bidders must complete and return all the necessary standard bidding documents (SBD's) attached to this request with technical and financial proposals.

1.2 Bidders are advised that their proposals should be concise, written in plain English and simply presented in the same order as indicted below:

- (a) Cover letter introducing your firm (a) credentials, capacity, capability and experience for this assignment;

- (b) National Treasury Centralized Supplier Database (CSD) registration summary report with a valid tax status;
- (c) Valid certified copy of B-BBEE certificate;
- (d) Bidders must have specific experience and submit at least three recent references (in a form of written proof(s) on their client's letterhead including relevant contact person(s), office telephone & fax number, website and email address) where similar work were undertaken.
- (e) Overview of the methodology your firm will apply for this assignment;
- (f) Project/assignment approach and plan which outlines the activities to be undertaken during the process;
- (g) Outline of the qualifications and related experience of the proposed resources that will be assigned to the matter;
- (h) Financial proposal to deliver the assignment including any other cost SA Tourism should be aware off for the successful completion of the assignment;
- (i) Declaration of Interest – SBD 4;
- (j) Preference Point Claim Form – SBD 6.1;
- (k) Declaration of Bidder's Past Supply Chain Management Practices – SBD 8; and
- (l) Independent Bid Determination – SBD 9.

2 Cost structure and project plan:

- 2.1 Bidders must submit the total bid price for the assignment based on the skills, resources and time allocated in providing the services.
- 2.2 Bidders should also propose innovation in their technical proposals to keep the cost to a minimum where SA Tourism will still benefit from the best possible qualitative outcome. SA Tourism reserves the right to request additional information or clarity on cost proposals prior to the evaluation thereof.

3 Evaluation Method

- 3.1 The evaluation process of bids will comprise of the following phases:

Phase 1	Phase 2	Phase 3
Administration and Mandatory bid requirements	Functionality	Price and B-BBEE
Compliance with administration and mandatory bid requirements.	Bids will be evaluated in terms of functionality.	<ul style="list-style-type: none"> (a) The bidders that have successfully progressed through to Phase 2 will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act, 2000 (b) 80 points will be awarded for price while 20 points will be allocated for preference points for BBEE as prescribed in the regulations.

3.2 Points awarded for functionality:

EVALUATION CRITERIA	Rating					Weight
	1	2	3	4	5	
The Bids will be evaluated on a scale of 1 – 5 in accordance with the criteria below. The rating will be as follows: 1 = Very poor, 2 = Poor, 3 = Good, 4 = Very good, 5 = Excellent						
Experience of Company: Bidders relevant experience in public sector strategic planning processes, development of annual performance plans and operational plans, facilitation of planning processes and development of strategy documents. Score of 1: 0 to 5 years' experience Score of 2: 5 to 15 years' experience Score of 3: 15 to 18 years' experience Score of 4: 18 to 20 years' experience Score of 5: More than 20 years' experience						30
Approach and ability to meet deliverables: Bidders must provide a detailed description of how they intend executing the services from inception to completion. This must include: <ol style="list-style-type: none"> 1. Methodology to undertake the scope of work 2. Alignment of proposed methodology to the prevailing regulatory frameworks and guidelines and an articulation of the application of these to the methodology to be deployed 3. Detailed project plan indicating milestones and related timelines 4. Sample of templates that will be utilised during the planning process 5. Draft agendas for the various planning processes and sessions for Board, Executive Management, Extended Management at annual performance planning and operational planning levels, for the first and final phase of planning. 						30
Company track record: The bidders are required to provide at least five (5) contactable client references where their services can be verified in relation to the scope of work identified in this RFQ document. References should be presented in the form of a written letter on an official letterhead from clients where similar services have been provided and should not be older than four (4) years. No appointment letters from clients will be accepted as reference letters. Score of 1: One contactable reference within last 4 years Score of 2: Two contactable references within last 4 years Score of 3: Three to four contactable references within last 4 years Score of 4: Five contactable references within last 4 years Score of 5: More than five contactable references within last 4 years						20
Expertise and experience of proposed resources to be assigned to the project: Proven experience of proposed resources to be deployed to provide the services. Detailed CVs of proposed team must be submitted which must elaborate on their qualifications, experience, membership, etc. Total number of years' combined experience of the proposed team members in public sector strategic planning processes, development of annual performance plans and operational plans, facilitation of planning processes and development of strategy documents. Score of 1: 0 to 5 years' experience Score of 2: 5 to 15 years' experience Score of 3: 15 to 18 years' experience Score of 4: 18 to 20 years' experience Score of 5: More than 20 years' experience						20
TOTAL POINTS FOR FUNCTIONALITY						100
A threshold of 70% is applicable.						

“**functionality**” means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, considering, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder.

- I. Bids will be evaluated strictly according to the bid evaluation criteria stipulated in this section.

- II. Bidders must, as part of their bid documents, submit supportive documentation for all functional requirements. The official responsible for scoring the respective bids will evaluate and score all bids based on bid submissions and the information provided.
- III. The score for functionality will be calculated in terms of the 1 - 5 rating scale as shown in the functionality criteria matrix under paragraph 4.2.
- IV. The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These scores will be added and expressed as a fraction of the best possible score for all criteria.
- V. The points for functionality and the points for B-BBEE level of contribution will be added together and the proposal from the bidder which meets the highest score will be deemed the preferred proposal.

4. Awarding of Points for Price and Broad-Based Black Economic Empowerment

The bidders that have successfully progressed through to Phase 3 (bidders who meet the minimum threshold for the functionality of **(70%)**) will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations of 2017.

80 points will be awarded for price while 20 points will be allocated for preference points for BBEE as prescribed in the regulations.

Points for B-BBEE level of contribution will be awarded in accordance with the below table: -

B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

5. Adjudication and Final Award of Bid

The successful bidder will usually be the service provider scoring the highest number of points for comparative price and BBEE level of contribution or it may be a lower scoring bid on justifiable grounds or no award at all.

6. National Treasury Centralized Supplier Registration and B-BBEE Certificates

6.1 All bid submissions must include a copy of successful registration on National Treasury’s Centralized Supplier Database (CSD) with a valid tax clearance status and an original or certified copy of a B-BBEE verification certificate (if you have been assessed).

6.2 Proposals which do not include these documents will not be considered.

7. Deadline for submission

All proposals must be e-mailed, in PDF format, to quotes@southafrica.net no later than **12H00 on Friday, 10 June 2022** and should remain valid for at least 45 days after the closing date.

8. Confidentiality

The request for a technical and cost proposal and all related information shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid. All bidders are bound by a confidentiality agreement preventing the unauthorized disclosure of any information regarding SA Tourism or of its activities to any other organization or individual. The bidders may not disclose any information, documentation or products to other clients without written approval of SA Tourism.

9. Terms of engagement

Prior to commencing with the assignment, the successful bidder will be required to meet with the SA Tourism's Head of Risk to finalize the statement of work (SOW) and criteria for approval.

10. Payments

10.1 No advance payments will be made in respect of this assignment. Payments shall be made in terms of the deliverables as agreed upon and shall be made strictly in accordance with the prescripts of the PFMA (Public Finance Management Act, 1999. Act 1 of 1999).

10.2 The successful bidder shall after completion of the contract, invoice SA Tourism for the services rendered. No payment will be made to the successful bidder unless an invoice complying with section 20 of VAT Act No 89 of 1991 has been submitted to SA Tourism.

10.3 Payment shall be made into the bidder's bank account normally 30 days after receipt of an acceptable, valid Invoice.

11. Non-compliance with delivery terms

The successful bidder must ensure that the work is confined to the scope as defined and agreed to. As soon as it becomes known to the bidder that they will not be able to deliver the services within the delivery period and/or against the quoted price and/or as specified, SA Tourism's Head of Risk Management must be given immediate written notice to this effect.

12. Retention

Upon completion of the assignment and / or termination of the agreement, the successful bidder shall on demand hand over to SA Tourism's Head of Risk Management all documentation, information, etc... relevant to the assignment without the right of retention.

13. Cost

The bidder will bear all the costs associated with the preparation of the response and no costs or expenses incurred by the bidder will be borne by SA Tourism.

14. Cancellation of the request for a technical and cost proposal

SA Tourism may, prior to the award of the bid, have the right to cancel the bid if:

- (a) Due to changed circumstances, there is no longer a need for the service; or
- (b) Funds are no longer available to cover the part and/or total envisaged expenditure; or
- (c) No acceptable bids are received.

SA Tourism reserves the right to withdraw this request for technical and cost proposals, to amend the term or to postpone this work by email notice to all parties who have received this request.

14. **Clarification**

Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning this request for technical and cost proposals, is to be requested in writing from the Sourcing Specialist

Thanking you and looking forward to your proposal in this regard.

Yours in Tourism