

**TERMS OF REFERENCE – DESIGN AND LAYOUT OF THE 2021/2022 ENTERPRISE ILEMBE ANNUAL REPORT**

**1. BACKGROUND**

iLembe Management Development Enterprise (Pty) Ltd, with company registration number 2006/032665/07, trading as Enterprise iLembe is the wholly owned Economic Development Agency of iLembe District Municipality. Enterprise iLembe is registered in terms of Company Laws of South Africa and established in terms of the Municipal Systems Act (section 86C) and is accordingly regulated to act as a Municipal Entity in terms of the Municipal Systems Act 32 of 2000 read together with the Municipal Finance Management Act 56 of 2003.

Enterprise iLembe’s core mandate is to pursue and attract investment and facilitate economic development in the iLembe District and its Local Municipalities that comprise of KwaDukuza, Mandeni, Ndwedwe, and Maphumulo.

Enterprise iLembe is required to prepare and submit its annual report in accordance with the requirements of the above-mentioned legislation. The report is required for statutory submission purposes and needs to be made available in the public domain for access by all stakeholders who have an interest in Enterprise iLembe’s performance.

**2. REQUEST FOR QUOTATIONS**

Enterprise iLembe hereby invites quotations from experienced and suitably qualified service providers for concept design of Enterprise iLembe’s Annual Report for the year 2021/2022 including, creative direction, design, layout and importantly timely delivery of high-quality report (full version in an electronic format).

**3. SPECIFICATIONS:**

**3.1 DESIGN & LAYOUT**

Size & Colours: A4 Portrait, Full colour throughout

Number of pages: Estimated 100 pages plus cover (4 pages)

Content & Copy: Content will be provided by Enterprise iLembe in the following formats:

- Microsoft Word Document
- Microsoft Excel Documents

- Microsoft Power Point Documents
- PDF Format

Content Edit: The service provider is expected to proof read the content supplied and correct any grammatical and spelling errors as well as any formatting issues.

Photography: Images will be supplied by Enterprise iLembe via Dropbox or email

Specifications: PDF (website and emailing compatible)

A proposed design and layout sample (cover and interior) must accompany the quotation

- Contemporary
- Clean Layout
- Should showcase developmental elements which is our core business

### **3.2 SCOPE OF WORK AND FINAL DELIVERABLES**

The selected service provider will be required to provide the following:

- Concept design of Enterprise iLembe's Annual Report for the year 2021/2022, creative direction, design, and layout
- Copy-write, edit and proof read the content supplied;
- Seamless Integration of all annual report components including financial statements and performance reports
- Development of proofs for review and final proof for sign-off.
- Timely delivery of high-quality electronic Annual Report for the year 2021/2022 suitable for web download and viewing and other electronic communication.

To achieve scope delivery, Service Provider will need to:

- Review prior Annual Reports to understand the organization's writing style – but propose innovative and contemporary design;
- Confirm writing syntax with client;

### **3.3 USE OF REASONABLE SKILL AND CARE**

- The entire report has to be of a professional and high standard.
- Extreme care has to be taken with all information and especially with numeric data.

- Zero-tolerance for errors in the annual financial statements, especially with the understanding that there will be several edit iterations as a natural part of the finalisation and rounding up of Enterprise iLembe's annual financial statements.
- Quotation must be accompanied by samples of previously designed and printed Integrated Annual Reports and Summary Annual Reports of organisations of a similar size and nature by the service provider submitting the quote.

### **3.4 APPROACH AND METHODOLOGY**

The method statement must respond to the Scope of Work and outline the proposed approach / methodology. The method statement should articulate what value the service provider will add by in achieving the stated objectives for the project. A proposed implementation plan must accompany the service providers proposal and must clearly set out the timeframes for each activity to ensure that the deadlines are met.

### **3.5 DATE OF DELIVERY OF FINAL PRODUCTS**

The date of delivery of the final electronic version is **3 weeks from the date of appointment** .

### **3.6 PRICING**

Service providers are requested to submit a quotation for the above-mentioned scope of work/ deliverables and are requested to quote for the **Design and Layout of Electronic version (Website and emailing compatible)**

## **4. PROCUREMENT POLICY**

Proposals will be evaluated in terms of the Procurement Policy of Enterprise iLembe and shall be applied as follows: -

- a) **Mandatory Evaluation-** All proposals will be evaluated in terms of the mandatory documents/ submissions. Failure of the service provider to submit any or all the mandatory requirements will result in disqualification from further evaluation.
- b) **Functionality Evaluation-** All proposals that meet the mandatory requirements shall be evaluated on functionality and thereafter only those who qualify for the next stage of evaluation will be evaluated in terms of the price evaluation.
- c) **Price Evaluation-** As specified in the PPPFA (No.5 of 2000) read together with the 2022 PPPFA Regulations and the 2011 B-BBEE Regulations.

## **5. CRITERIA FOR EVALUATION**

### **5.1 Mandatory Documents/ Submissions**

**Proposals/ Quotations must be accompanied by the following mandatory documents/ submissions:**

- Valid TCS Pin issued by SARS (compulsory)
- Proof of registration on the Central Suppliers Database for Government (CSD). A CSD registration report or number must be submitted (compulsory). (The CSD report/number report will be available on the CSD Website once you have registered on the Central Suppliers Database. **Please visit <https://secure.csd.gov.za/> to register on the Central Supplier Database.**) The CSD will be used to verify tax compliance status of the bidder. NB: Bidders who are in service of the state as per CSD will be disqualified from further evaluation unless supporting documents proving the supplier is not a government employee is submitted as part of the proposal.
- MBD 4 – Declaration of Interest Form (compulsory)
- MBD 6.1 – 2022 Preference Point Claim Form (compulsory) - please note that failure to indicate the number of points being claimed by the service provider on page 4 of MBD 6.1 and submit the supporting documents as indicated in this form will result in no points being awarded in the 80/20 price calculation.
- Company registration document (Compulsory)
- Proof of banking details/ Bank Statement (Compulsory)

**Note:**

- Failure to submit compulsory documents will result in your proposal being disqualified.
- Reference checks may be performed as part of the evaluation of this request for quotations.
- The successful service provider will be required to register on the Enterprise iLembe Suppliers Database.
- **All MBD forms** listed above must be completed correctly signed, failure to complete and sign will result in disqualification.

## 5.2 Functionality Evaluation

The functionality evaluation points will be applied as per the table below:

**Any proposal that fails to achieve a minimum of 60 points of the total of 100 and a score greater than zero in categories marked with an asterisk (\*) on the functionality evaluation shall not be evaluated further and will be deemed to be non-responsive.**

#	Competency	Points Allocation	Maximum Points
1	<p><b>Service Providers Experience:</b></p> <p>Reference letters of the business for similar work undertaken in the design, layout, copyright and editing of similar annual reports</p> <p>(Please submit relevant reference letters to claim points for this) (*)</p>	<p>0 letters – 0 points</p> <p>1 Letter – 10 points</p> <p>2 Letters – 20 points</p> <p>3 Letters – 30 points</p> <p>4 Letters – 40 points</p>	40 points
2	<p><b>Approach, Methodology &amp; Implementation Plan:</b></p> <p>Proposal should clearly show how the service provider will deliver on this project.</p>	<p>No proposal/ proposal reflects poor understanding of the TORs - 0 points</p> <p>Proposal shows understanding of TOR but not clear on how results will be achieved (no implementation plan)– 10 points</p> <p>Proposal displays clear understanding of the TOR, clear on how results will be achieved but does not provide sufficient proof of ability to achieve these (past experience, skilled team members etc.) – 15 points</p> <p>Proposal displays clear understanding of the TORs, clear on how results will be achieved and provides sufficient proof of ability (past experience, skilled team members etc.) to achieve these -20</p>	20

3	<b>Proposed Design Layout(*)</b> Proposed design layout of the annual report (Cover and Interior) to be submitted in electronic format	The proposed layout meets the requirements in terms of the tone and feel required for this project: <ul style="list-style-type: none"> <li>• Contemporary -10 points</li> <li>• Clean Layout -5 points</li> <li>• Should showcase developmental elements which is the EI core business -5 points</li> </ul>	20
4	Electronic <b>sample</b> of previously designed and printed Integrated Annual Reports and Summary Annual Reports of organisations of a similar size and nature by the service provider submitting the quote.	One sample – 10 points Two samples – 20 points	20

**Only service providers who achieve a minimum of 60 points of the total of 100 and a score greater than zero in categories marked with an asterisk (\*) on the functionality evaluation shall be evaluated in terms of the 80/20 points scoring system as set out below.**

**5.3 The 80/20 preference point scoring system will be applied with points allocated as follows:**

- 80 points for the price
- 20 points for specific goals

**Service Providers wishing to claim a maximum of 20 preference points in terms of Specific Goals must attach the following:**

- 1. Valid B-BBEE certificate/ affidavit (Level 3 or above)- 10 points**
- 2. Proof of location of the business- Maximum of 10 points (Please submit a signed councillor letter, valid signed lease agreement or a utility bill not older than three months & in the business name) to claim points for this)**
  - **If the business is located in within iLembe – 10 points**
  - **If the business is located within KZN – 5 points**
  - **If the business is located within South Africa – 5 points**

## **6. CLOSING DATE**

Proposals can be emailed to [siyabongasi@enterpriseilembe.co.za](mailto:siyabongasi@enterpriseilembe.co.za)

Closing Date for submission of proposals: **11 August 2023 at 12h00**