

**TERMS OF REFERENCE – DESIGN AND LAYOUT OF THE 2023/2024 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. INTRODUCTION

Enterprise iLembe Economic Development Agency seeks the services of a Professional Design Agency or Individual to Conceptualize, Design, and Layout its Annual Report for the financial year 2023/2024, including, creative direction, design, layout and importantly timely delivery of high-quality electronic report (full version in an PDF format for web and email applications). The objective is to produce a visually engaging, high-quality report that effectively communicates the agency’s achievements, impact, and financial performance.

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 supplied by Enterprise iLembe in the following formats:
Microsoft Word Document

- Microsoft Excel Documents (*financial statements must be converted to relevant design format and not pasted as pictures)
- Content Edit: The service provider is expected to proofread 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, however the service provider to also source appropriate photo-stock photos if necessary,
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.

OBJECTIVES The primary objectives of the Annual Report Design and Layout are to:

- Ensure a professional and aesthetically appealing presentation.
- Enhance readability and accessibility of key information.
- Incorporate creative and visually engaging elements.
- Maintain consistency with Enterprise iLembe’s branding and visual identity.
- Present complex data and statistics in an easy-to-understand manner.

3.2 SCOPE OF WORK AND SPECIFICATION

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

- Concept design of Enterprise iLembe’s Annual Report for the year 2023/2024, creative direction, design, and layout.
- Copy-write, edit and proofread 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 2023/2024 suitable for web download and viewing and other electronic communication.

DELIVERABLES The service provider shall deliver the following:

- Initial design concepts for approval.
- A full draft Layout incorporating all feedback.

- A final print-ready and digital version of the Annual Report.
- Editable source files for future use.

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.

TECHNICAL REQUIREMENTS

- High-resolution design suitable for both print and digital distribution.
- Compatibility with standard printing specifications.
- Interactive elements for digital accessibility.
- Compliance with corporate branding guidelines.

3.3 USE OF REASONABLE SKILL AND CARE

- The entire report must be of a professional and high standard.
- Extreme care must 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.

QUALIFICATIONS & EXPERIENCE The selected service provider should demonstrate:

- Proven experience in designing annual reports or corporate publications.
- Strong portfolio showcasing high-quality design work.
- Expertise in infographic and data visualization design.
- Proficiency in industry-standard design software.

3.5 DATE OF DELIVERY OF FINAL PRODUCTS

The date of delivery of the final electronic version is **three (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 as detailed in section 5.1, below. 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 (as per section 5.2, below) 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, as detailed in section 5.3, below.

5. CRITERIA FOR EVALUATION

a. Mandatory Documents/ Submissions

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

- Service Providers Proposal together with cost implications **(Compulsory)**
- Valid TCS Pin number 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**)

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

b. 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>Service Providers Experience:</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

#	Competency	Points Allocation	Maximum Points
2	<p>Approach, Methodology & Implementation Plan:</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	<p>Proposed Design Layout(*)</p> <p>Proposed design layout of the annual report (Cover and Interior) to be submitted in electronic format</p>	<p>The proposed layout meets the requirements in terms of the tone and feel required for this project:</p> <ul style="list-style-type: none"> • Contemporary -10 points • Clean Layout -5 points • Should showcase developmental elements which is the EI core business -5 points 	20
4	<p>Electronic sample 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.</p>	<p>One sample – 10 points</p> <p>Two samples – 20 points</p>	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.

c. Pricing Evaluation - 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 – 2 points**

6. PAYMENT TERMS

Payments will be made on invoices rendered for work completed. On receipt of invoices rendered the service provider should allow at least four (4) weeks for the payments to be processed.

7. NON-APPOINTMENT

Enterprise iLembe has a right not to make an appointment should it find that proposals received do not meet the specified criteria / requirements and is not compelled to accept the lowest proposal. Further, no awards will be made to suppliers in service of the state.

8. REPORTING

Upon appointment, the service provider will work in close co-operation with Enterprise iLembe management. The service provider will also be expected to keep financial records and other appropriate records.

9. PERFORMANCE OF SERVICE PROVIDER

Once appointed, the performance of the service provider will be measured on a continuous basis. The key performance indicators applicable to this are as follows:

Performance Indicator		Weighting
1	Quality of Service	30
2	Timeliness of Completion	25
3	Cost Control	25
4	Business Relations	10
5	Management of Key Personnel (i.e. management of the service providers team allocated to the project)	10
		<u>100</u>

10. INFORMATION CONTACT

For enquiries please contact Ms Sithembile Ngcobo (Communications & Marketing Officer) on:

- E-mail: sithembile@enterpriseilembe.co.za
- Telephone: 032 946 1256

11. CLOSING DATE

Proposals can be emailed to siyabongasi@enterpriseilembe.co.za

Closing Date for submission of proposals: 27 February 2025 at 12h00.