

TERMS OF REFERENCE

**SALGA REQUIRES A SERVICE PROVIDER TO CREATE A MOBILE APPLICATION TO DISSEMINATE THE
LOCAL GOVERNANCE & DEVELOPMENT DATABASE**

BID: SALGA/42/2016

CLOSING DATE: 09 DECEMBER 2016

PROPOSALS CAN BE DEPOSITED IN THE TENDER BOX AT RECEPTION AT:

SALGA NATIONAL OFFICE

BLOCK B

MENLYN CORPORATE PARK

C/O GARSFONTEIN AND COROBAY AVENUE

WATERKLOOF GLEN

012-369 8000

1. PURPOSE

These Terms of Reference (TOR) are aimed at soliciting a competent service provider to create a cross-operating system compatible mobile software application for the Municipal Barometer.

2. BACKGROUND

Municipalities are expected make informed and reliable decisions in order to address the challenges they are confronted with and to effectively deliver their ever increasing mandates. The processes require application of knowledge and intelligence by practitioners in order to make informed decisions. However, access to existing local level data remains a challenge. There are many agencies that collect municipal level data. However, the quality of the data collected and indicators developed by some of the agencies vary, which makes data comparability across municipalities difficult. Often, data is disaggregated to provincial levels and on limited occasions to metro and district level to the exclusion of local municipalities, wards and neighbourhood levels. Private data agencies have identified this gap and often sell the data at high costs. Those municipalities that cannot afford to pay are therefore unable to access critical data for planning and oversight purposes etc. finally, even though all these institutions are targeting municipalities as recipients of data, their activities are fragmented and remain uncoordinated.

Local Government authorities in South Africa have constantly raised concerns regarding the lack of accessibility of reliable local level data to enable them to make informed decisions. A study conducted by SALGA and the Wits University's African Centre for Migration and Society (ACMS), 2010 pointed out that municipalities are unable to draw nuanced and dynamic understanding of their constituencies due to limited availability of local level data. COGTA, 2009, mentioned that 'the information intelligence base of what is happening in municipalities is uneven and actually absent in many respects. Consequently, planning is not sufficiently aligned; implementation is fragmented and there is weak oversight by councillors as well as provincial and national authorities. In 2008, Statistics South Africa raised concerns about general supply of statistical data for government planning and decision making.

SALGA is assigned a very critical role of transforming the local government sector to enable it to fulfil its developmental mandate. Thus, for SALGA to advise, support, represent, lobby and advocate on behalf of municipalities, it requires readily available, timely, up-to-date and accurate information. Equally, municipalities require the same information to enable them to make informed and reliable decisions.

As a result SALGA has set Knowledge Management and Information Sharing as one of its six main functions to deliver on its mandate of transforming Local Government sector in order to enable it to better deliver on its mandate.

Consequently, the SALGA Knowledge Management Strategy approved by the SALGA Executive Management Team (EMT) together with the SALGA Strategic Plan 2012-2017 approved by the SALGA National Executive Committee (NEC) identify Knowledge Management as one of the critical organisational

functions. This function emphasizes that SALGA must build a comprehensive hub of local government knowledge and intelligence that would enable informed delivery of SALGA's and municipalities mandates. The intelligence built should also be a useful reference point for all who seek Local Government information. As a result SALGA established the Local Data Programme to collect existing municipal data and disseminate it through the Municipal Barometer Web-portal.

2.1 The Local Government Development Data Programme (LGDDP)/Municipal Barometer

The Programme is a SALGA initiative that has developed to include collaborations with Statistics South Africa (StatsSA), Department of Monitoring & Evaluation (DPME) Development Bank of Southern Africa (DBSA), Municipal Demarcation Board (MDB), South African Cities Network (SACN) Centre for Municipal Research and Advice (CMRA).

It is aimed at collecting, packaging existing local level data from key data agencies and disseminate through one stop shop web-based portal referred to as the Municipal Barometer. The ultimate objective of the Municipal Barometer is to ensure that readily available local level data is easily accessible to municipalities.

2.2 Objectives Local Data Programme

1. Improving municipal governance and performance by improved planning, oversight, and peer learning
2. Identifying & addressing municipal data needs at minimal costs;
3. Collating, collecting and dissemination of existing and new data.
4. Managing access to data through a single comprehensive yet simple web-based portal; and
5. Making local level data accessible to municipalities and their stakeholders;
6. Building the capacity of municipalities to locate, access, interpret and utilize data for planning, budgeting and governance processes.
7. Assess municipalities individual performance
8. Benchmark municipalities against each other
9. Enhance SALGA research agenda on issues affecting LG
10. Enhance Local Government development agenda
11. Facilitate dialogues on critical issues affecting municipalities
12. Profiling the performance of the sector
13. Facilitate data partnerships of benefit to the local government sector.

3. PROGRESS TO DATE

The portal has been established and is accessible through www.municipalbarometer.org.za or <http://www.salga.org.za/pages/Knowledge--Hub/Knowledge-Portals>. The Municipal Barometer tracks nine broad outcome indicators; these are: **demographic trends, access basic services, access to social services, economic growth and development, environmental resilience, municipal finances, governance and accountability, coherent municipal planning and municipal capacity (Capacity building, HR and labour relations)**. A Benchmarking Tool has been added which allows municipalities to be scored and ranked. While the database current houses census years and household survey data for 1996, 2001, 2007 and 2011, the Benchmarking Tool operates off a full database compliment for 2011 to 2014 across four thematic areas that aggregates all populated indicators into a performance index.

This document serves to guide bidders to develop a proposal for the analysis and augmentation of the Municipal Barometer Database by means of a smart phone application.

4. THE ASSIGNMENT

The aim of developing a mobile device application is to create another access channel to increase traffic to the Municipal Barometer database, a web-based portal. Increasing traffic to the Municipal Barometer database will be done by targeting the most used device channel in South Africa. The choice of a mobile device is to allow for capability to meet present and future demands for developmental data and to promote convenient access to data within a diverse audience with varied levels of skills in operating smart devices. In anticipation of future developments, the mobile application ought to lend itself to easy integration with other data platforms.

This chapter describes specific requirements for the Smart Phone Application. Basic functionalities must be present in the proposed Application that will allow for the following objectives to be pursued:

1. To develop a mobile application that has a quick access method;
2. To allow the user to access geographically specific data derived from the Municipal Barometer Database through a reliable broadband channel;
3. To integrate the Municipal Barometer Database among a diverse group of stakeholders with varying levels of competency to operate applications and understand database outputs.
4. To allow for user preferences to be logged to enable the gathering of insights on user data needs, data preferences and access behaviour; and
5. Provide recommendations on how cost recovery mechanisms can be implemented on the application and how the database can be further popularised through technology solutions.

It is thus against this backdrop that SALGA requires services of a competent company to deliver on the deliverables outlined in section 4.1 below:

4.1 DELIVERABLES

The service provider will be expected to work with the service providers who developed the Municipal Barometer database to ensure that the deliverables are met in accordance with the specifications outlined in 4.2 without compromising the integrity of the existing system. It is thus against this backdrop that SALGA requires services of a competent company to deliver on the deliverables outlined in section 4.1.1 below through the following documentation:

- A) A concept proposal for the application that describes the various mobile platforms;
- B) A financial proposal that indicates three possible design and costing scenarios; and
- C) A five (5) month timeline of activities with a budgeted cost of work.

4.1.1 A Smart Phone Application that takes into consideration the following key themes at municipal and ward levels:

- Four output areas of the benchmarking tool (i.e. municipal capacity, IDP planning, human resources and municipal finances).
- Demographic trends
- Access basic services
- Access to social services
- Economic growth and development
- Municipal Finances
- Environmental resilience
- Municipal Planning
- Municipal Benchmarking Tool Outcome Area Scores (HR, capacity building and labour relations).

4.2. SMART MOBILE APPLICATION SPECIFICATION PARAMETERS

4.2.1 Access to thematic indicator baskets must be GIS-based and enabled;

4.2.2 The Application must generate basic info-graphics and tables in an easily understood and interesting way.

4.2.3 These outputs must be as low data intensive as possible and should not excessively consume user processing resources or financial resources.

4.2.4 The Application must be cross-platform compatible to assist in scalability i.e. the app must run off Android, USSD, iOS etc.

- 4.2.5 A 'Get help' function to request assistance if needed linked to a dedicated email group.
- 4.2.6 Integrate app into workflow management processes, i.e. paper trail
- 4.2.7 The application should be able to accommodate saved queries.
- 4.2.8 The application should have reporting power in the sense that reports can be drawn and emailed to the relevant user upon request.
- 4.2.9 The application should also be linked to an analytics tool to monitor usage and download
- 4.2.10 In-application purchasing functions must be built into the application to allow for higher end and processed data products to be bought online.
- 4.2.11 The application must be unique enough to allow SALGA to assert intellectual property rights over the product.
- 4.2.12 The Application must conform to the look and feel of SALGA's corporate identity.
- 4.2.13 The project duration is five (5) months. This includes development, beta testing and testing of the application.
- 4.2.14 In-house training on the use of the application in a training of trainers format.
- 4.2.15 The user interface must be in English with other selectable language options (e.g. Afrikaans, isiZulu or isiXhosa).

5. REQUIREMENTS

5.1 PROPOSAL & METHODOLOGY

The service provider must prepare a proposal outlining how the above mentioned deliverables will be undertaken in order to translate the data into insight and business value. The proposal must include a Project Plan with activity timelines and a budget.

5.2 TECHNICAL SKILLS:

1. The applicants should be a technology company with a proven record of innovation in the mobile platform and application field. The company should have a proven record of applications on the market in both Android and Apple OS.
2. The company should have a team of experts that include technology and design experts and coders, social media experts, mobile platform innovation experts.
3. A working knowledge of international development issues and agendas is an asset.

4. The team leader should have at least 7 years of relevant technology and innovations experience and hold a master degree in a relevant field.
5. The applicants should also be conversant with GIS-based plug-ins and GIS database formats i.e. shape and vector files;
6. Programming, data management and data modelling skills;
7. Data analysis, report writing and presentation skills; and
8. The service provider must be able to prove functionality of all the specifications.

6. EVALUATION

The following evaluation method will be used:

- There will be a compulsory briefing meeting for all service providers prior to the submission of proposals on a venue, date and time that will be duly communicated.
- After the closing date of the bid invitation, an appointed evaluation committee of SALGA officials and possibly other external parties will evaluate the proposals of the bidders.
- The committee will individually evaluate each of the bid proposals received against the appointed criteria as provided for in Preferential Procurement Policy Framework Act of 2005 (As amended).
- For the service providers who qualify, a compulsory presentation meeting will be held at a venue, date and time to be announced.

All proposals submitted will be evaluated on three categories:

- (i) Functionality (technical content)
- (ii) Price
- (iii) B-BBEE status level of contribution

Bids are evaluated in accordance with the preferential procurement Policy Framework Act (PPFA), using the 80/20 split.

Firstly, the assessment of functionality will be done in terms of the evaluation criteria and the minimum threshold value of 70 points. A bid will be disqualified if it fails to meet the minimum threshold value for functionality as per the bid invitation.

Thereafter, only the qualifying bids after the presentation will be evaluated in terms of the 80/20 preference points systems, 80 points will be used for price only and the 20 points are used for B-BBEE Status Level of Contribution.

The Point's breakdown is as indicated below:

For functionality, the following criteria will be applicable and the maximum value of each criterion is indicated as below:

ON A SCALE OF 1 = Very Poor 2 = Poor 3 = Good 4 = Very good 5 = Excellent

CRITERIA FOR FUNCTIONALITY	WEIGHT
1. Proposed design approach concerning the deliverables outlined in Sections 4 and 5 (Proposed demonstration model must be submitted in a hard copy and CD)	40
2. Previous experience in similar projects (3 referral letters from companies where similar service has been conducted.	40
3. Experience on service –oriented architecture and geospatial information systems.	10
4. Experience on web service-based platforms.	10
Total for functionality	100
Threshold	70

Bidders who score 70 (average) points and above will be considered in phase 2 of the evaluation. Phase two will include live presentations.

The 80/20 points system will be used when evaluating this Request for Proposal. The remaining 20 points will be allocated in terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Summary of phase 2 of the evaluation process:

CRITERIA	WEIGHT
Price	80
B-BBEE status level of contribution	20
TOTAL	100

7. DURATION

The duration of the contract is five (5) months

8. CONDITIONS OF TENDER

The requirement for content of the project proposal section below outlines the information that must be included in bid offers. **Failure to provide all or part of the information may result in your bid being excluded from the evaluation process.**

- 8.1. A contract will be signed with each member i.e. the Security Services Company appointed
- 8.2. Service Providers will be required to sign confidentiality and indemnity agreements with SALGA.
- 8.3. Service Providers are not guaranteed any work under this tender proposal.
- 8.4. SALGA reserves the right to interview Service Providers that are shortlisted for specific assignments.
- 8.5. SALGA may at its own discretion vary an instruction to include more work.
- 8.6. The Appointed Service Provider may not cede or assign any part of its agreement with SALGA nor subcontract any part of the work assigned to them without the prior written authorization of SALGA.
- 8.7. Failure to comply with any condition of this request for a proposal will invalidate respective tender proposal
- 8.8. Service Providers must declare any interest it has in an assignment as well as declare any possible conflict of interest with SALGA in the pursuance of the proposed assignment
- 8.9. In the event that any conflict of interest is discovered during the assignment, SALGA reserves the right to summarily cancel the agreement and demand that all the information, documents and property of SALGA be returned forthwith.
- 8.10. SALGA reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its project proposal.
- 8.11. Bidders shall not make available or disclose details pertaining to their project proposal with anyone not specifically involved, unless authorized to do so by SALGA.
- 8.12. Bidders shall not issue any press release, social media or other public announcement pertaining to the details of their project without the prior written approval of SALGA.
- 8.13. Bidders are required to declare any conflict of interest they may have in the transaction for which the bid is submitted
- 8.14. A valid original Tax Clearance Certificate issued by the South African Revenue Services is no longer a requirement as the tax compliance status of the bidder will be verified on the Central Supplier Database (CSD), so it is the responsibility of the bidder to ensure that their tax matters are in order and updated on CSD, bidders with a non-compliant status shall not be considered and may be disqualified.
- 8.15. The bid offers and proposals should be valid and open for acceptance by SALGA for a period of 120 days from the date of submission
- 8.16. Bidders are advised that submission of a project proposal gives rise to no contractual obligations on the part of SALGA

- 8.17. Disputes that may arise between SALGA and a bidder must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- 8.18. In addition to adherence to the specific terms and conditions of proposals, provided in this document, the bidder shall be bound by the provisions of the General Conditions of Contract attached hereto, an originally signed copy of which must be submitted together with all other bid documentation.
- 8.19. All returnable bid documents must be completed in full and submitted together with the bidder's proposal.
- 8.20. **An original proposal, 3 copies of the proposal must be submitted with the bid.**
- 8.21. SALGA will not be liable for costs incurred during the site visits or any other cost related to the submission of the bid.
- 8.22. Completion of the Standard Bidding Documents stated herein below is **mandatory**, failure to do so **may** render your bid offer invalid.
- 8.23. **Preference Points Claim form**

Form SBD 6.1 - Bidders must complete this document in full, special attention must be given to section 8 and 9. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

8.24. Declaration of Interest

Form SBD 4 - Bidders must complete this document in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

8.25. Declaration of past Supply Chain Management Practice

Form SBD 8 - Bidders must complete this document in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

8.26. Certificate of Independent Bid Determination

Form SBD 9 - Bidders must complete this document in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

8.27. Pricing Schedule

Form SBD 3.3. Price must be quoted in South African currency and must be inclusive of VAT. Bidders are further requested to indicate their price in all elements listed on the pricing schedule.

8.28. Invitation to Bid

SBD1 must be completed in full and signed

8.29. Supplier Registration.

Bidders must register on CSD. Find attached herein: The National Treasury Instruction Note of 4A of 2016/2017 Central Supplier Database. Successful bidder will be expected to further submit a Bank Indemnity Form stamped by the bank in order to be registered in our database.

8.30. An original or certified copy of a valid BBBEE certificate must be submitted together with the bid offer

9. SPECIAL CONDITIONS

9.1 SALGA may at its own discretion vary this instruction to include more scope / work or to exclude work/service areas. In the case of the latter, the bidder shall not be entitled to claim for any work not required and may engage SALGA on the pricing of the additional work/ service proposed.

9.2 All copyright and intellectual property rights that may result as a consequence of the work to be performed shall reside with SALGA and the service provider shall be required to sign an agreement of confidentiality.

9.3 SALGA may dictate the framework in which documents (policies, plans, report etc.) shall be submitted; however the service provider should be able to submit a proposal on the lay-out of his/her choice for consideration by SALGA.

9.4 SALGAs (general conditions of bid, contract and order) shall be applicable to this bid. The service provider shall be required to conclude and sign a Service Level Agreement (SLA) after the appointment

10. COMPULSORY BRIEFING SESSION

A Compulsory briefing session it to be held as follows:

Date: 22 November 2016

Time: 11:00

Venue: SALGA (National Office) , Block B Menlyn Corporate Park, 175 Corobay Avenue, Corner Garsfontein Road, Waterkloof Glen X11, Pretoria, 0181.

11. ENQUIRIES AND SUBMISSION DETAILS

Any queries may only be directed to Precious Nzuza on email: scm@salga.org.za

Bid documents must be submitted on or before 11h00 am on the specified closing date at SALGA National Offices located at First Floor, Block B Menlyn Corporate Park, 175 Corobay Avenue, Corner Garsfontein Road, Waterkloof Glen X11, Pretoria, 0181.

Please note that late bids will not be accepted.