



Terms of Reference for Facilitator for the EPWP Branch Strategic Planning Meeting scheduled for 2, 3 and 4 February 2022

1. Background information

On an annual basis, the Expanded Public Works Programme (EPWP) Branch is required to develop an Operational Plan and an Annual Performance Plan to determine the work that will be delivered for the year. As such, the programme is currently in the process of developing a Business Plan for the 2022/23 financial year, in line with the requirements of the Department of Public Works & Infrastructure. Therefore, the EPWP seeks to appoint a service provider to facilitate the Strategic Planning Session and to develop a business plan culminating from this session.

2. Purpose

The main purpose of the assignment is to provide technical assistance and facilitation services in support of the business planning process of the Department of Public Works & Infrastructure EPWP branch. The services required will include the following:

- a. Design and facilitation of the business planning process (workshop).
- b. Compilation of the business planning workshop report.
- c. Developing the 2022/23 Operational Plan and the 2022/23 Annual Performance Plan for the EPWP Branch.

The service provider will lead the development of a business plan that will revisit the vision, mission and goals of the programme and help to determine and articulate the future direction of the programme.

3. Scope of work

The scope of work for the strategic plan facilitator will include the following:

- a. Undertake a desktop review of the EPWP, document analysis of the programme, situational analysis of the programme and design the business planning session.
- b. Advise management of the proceedings of the business planning session. Specifically, the proceedings should accommodate the lockdown limitations on gatherings due to COVID-19 and incorporate the best practices of remote facilitation via virtual platforms which will ensure optimal participation in the planning session.
- c. Facilitate the business planning proceedings that will result in the development of the 2022/23 Operational Plan and the 2022/23 Annual Performance Plan of the EPWP Branch.
- d. Facilitate the plenary and breakaway sessions.
- e. Conduct a thorough but focused business SWOT analysis or other relevant business analyses of the EPWP, with a view to identifying appropriate strategic options for the remainder of EPWP phase IV (2022/23 and 2023/24).
- f. Support the EPWP branch in establishing realistic goals and objectives with a defined time frame; and assist with the development of an action plan to achieve these goals and objectives.
- g. Capture notes and inputs from all participants at the strategic planning session.
- h. Prepare a report on the planning session and its outputs (2022/23 Operational Plan and the 2022/23 Annual Performance Plan for the EPWP).

The planning should focus, amongst other things, on the following:

- a. A strategic vision for the programme that is understood by all staff and stakeholders.
- b. Priorities for the programme and strategies to address these.
- c. Outcomes, outputs, targets and major activities.
- d. Develop comprehensive performance indicators that enables the programme to track, monitor and review progress against targets.

4. Requirements in terms of the facilitator

The following requirements apply to the service provider;

- a. Ability to provide a proposal which sets out the basis by which the assignment will be done.
- b. Ability to generate high level reports and business plans.
- c. Experience in facilitation of strategic planning workshops and at least three references for previous work done in this area provided.
- d. Have own team to assist with facilitation logistics and Secretariat to record proceedings (maximum of 2 people) during plenary sessions.
- e. A thorough understanding of the South African Public Sector.
- f. Extensive knowledge of the Expanded Public Works Programme (EPWP).

5. Qualifications and skills

The service provider should hold at least a post graduate qualification and be highly knowledgeable on strategic planning and business plan development. He/she must have knowledge in public employment programmes (PEPs). In addition, the service provider should possess the following skills and competencies:

- a. Experience in strategic planning and facilitation.
- b. Good analytical and report writing skills.
- c. Good communication and facilitation skills.
- d. Good interpersonal skills.
- e. Advanced computer literacy.

6. Proposal and quotation

The service provider is required to provide a proposal setting out the basis by which the assignment will be undertaken within the budget specified. The service provider is required to provide the following detail of the relevant experience of the individual/s that will be undertaking work, including an implementation plan covering:

- a. A detailed CV of the individual/s identified to perform the assignment and their respective envisaged input in terms of quantity and timing.

- b. A proposal which sets out how the assignment will be delivered and time frames for each component of the work.

7. Key deliverables and time frames

The service provider is expected to produce the following:

- a. Draft outline of the business plan submitted 1 week after the planning session (i.e. 11 February 2021).
- b. Draft project report including SWOT analysis, objectives and activities to be undertaken by the branch.
- c. Final report (including 2022/23 Operational Plan and the 2022/23 Annual Performance Plan for the EPWP) submitted by 18 February 2021.
- d. The above report must be submitted electronically in MS Word format.

The scheduled timeframe for the business planning process is from 2 February 2022 to 18 February 2022.

8. Contracting and reporting

- a. The Service Provider will be contracted by the Department of Public Works to undertake the assignment on behalf of the EPWP Branch. This will be based on the proposal and quotation submitted.
- b. The Service Provider shall be accountable to the EPWP Branch in terms of fulfilling the actions set out in the proposal.
- c. The service provider will report to the Director: Analyst and Compliance, Mr. Tjaart van der Walt.
- d. The reports shall be submitted according to agreed formats and timeframes.

9. Review criteria for proposals

The following criteria will be applied in the review of the proposal.

Criterion	Description	Weight (%)														
1	<p>The facilitator should have the relevant qualification in Strategic Management and Risk Management. (Proof of qualification to be provided)</p> <table><tr><th>Classification</th><th>Score</th></tr><tr><td>Master degree or higher</td><td>5</td></tr><tr><td>Honours degree</td><td>4</td></tr><tr><td>Degree or post-graduate diploma</td><td>3</td></tr><tr><td>Diploma</td><td>2</td></tr><tr><td>Less than diploma OR no proof of qualification provided</td><td>0</td></tr></table>	Classification	Score	Master degree or higher	5	Honours degree	4	Degree or post-graduate diploma	3	Diploma	2	Less than diploma OR no proof of qualification provided	0	30%		
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Honours degree	4															
Degree or post-graduate diploma	3															
Diploma	2															
Less than diploma OR no proof of qualification provided	0															
2	<p>The facilitator to provide previous proven experience on strategic planning and facilitation (at least 3 references of clients for whom similar work was previously done). Facilitator's CV and contactable references to be attached.</p> <table><tr><th>Classification</th><th>Score</th></tr><tr><td>10 years or more</td><td>5</td></tr><tr><td>7-9 years</td><td>4</td></tr><tr><td>5-6 years</td><td>3</td></tr><tr><td>3-4 years</td><td>2</td></tr><tr><td>Less than 3 years</td><td>0</td></tr></table>	Classification	Score	10 years or more	5	7-9 years	4	5-6 years	3	3-4 years	2	Less than 3 years	0	35%		
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3	<p>The service provider to provide a detailed methodology detailing how the assignment will be implemented, covering:</p> <ul style="list-style-type: none">a. How the overall assignment will be delivered within the time frames.b. Cost-breakdown for implementation.c. Communication and engagement strategy (ensuring full participation).d. Detailed CV/s of individual/s identified to perform the assignment. <table><tr><th>Classification</th><th>Score</th></tr><tr><td>Methodology that covers all the above topics</td><td>5</td></tr><tr><td>Methodology that covers 4 of the above topics</td><td>4</td></tr><tr><td>Methodology that covers 3 of the above topics</td><td>3</td></tr><tr><td>Methodology that covers 2 of the above topics</td><td>2</td></tr><tr><td>Methodology that covers 1 of the above topics</td><td>1</td></tr><tr><td>Methodology that covers none of the above topics</td><td>0</td></tr></table>	Classification	Score	Methodology that covers all the above topics	5	Methodology that covers 4 of the above topics	4	Methodology that covers 3 of the above topics	3	Methodology that covers 2 of the above topics	2	Methodology that covers 1 of the above topics	1	Methodology that covers none of the above topics	0	35%
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Methodology that covers 1 of the above topics	1															
Methodology that covers none of the above topics	0															

10. Contact Person:

Mr. Tjaart van der Walt- Director: Analyst and Compliance

072 130 6976

Alternative contact person:

Ms. Shalati Mushwana- Assistant Director: Compliance

076 810 8222

