

REQUEST FOR QUOTATIONS

Consultant to develop a 5-year Strategic Plan

August 2021



1. SCOPE OF WORK

1.1. BACKGROUND

NACOSA is a network of over 2,500 civil society organisations working together to turn the tide on HIV, AIDS and TB in South Africa. NACOSA promotes dialogue, builds capacity with accredited training, mentoring and technical assistance and channels resources to support service delivery on the ground, particularly among key populations and women and girls. As a principal recipient of the Global Fund and in partnership with USAID and PEPFAR and other public and private sector partners, NACOSA works at all levels – from international agencies and national government, though to sub-district services and small, community groups.

1.2. PROJECT OVERVIEW

NACOSA seeks the professional services of a consultant / team to review its current strategic plan which expires in 2021 and lead a strategic planning exercise to produce a strategic plan for the period 2022 to 2027.

Much has changed over the last 5 years, both within NACOSA and the context within which NACOSA operates. This includes the funding, political environment, stakeholders and partners NACOSA works with. NACOSA itself as an organization has also undergone exponential growth. This rapid growth has not allowed for the concomitant organizational development within NACOSA, to be able to create an organizational response that allowed for the institutionalization of decision making and memory, and the collective to be strengthened.

As an organization NACOSA needs to both make sense of the impact these external changes have had on the organization and implications for its longer-term sustainability.

NACOSA has stable short-term funding for the next three to five years and wishes to use this period to strengthen its medium to longer term sustainability. The production of the strategic plan is equally important in respect of both the document that is produced as well as the process by which the Strategic Plan is developed. This would entail an engagement with stakeholders inside and outside the organization both to develop the plan and secure its implementation.

1.3. QUALIFYING CRITERIA

Successful consultants or companies should have:

- Legal status recognized to work in South Africa;
- Demonstrated experience of successful delivery of similar work;
- Ability to work creatively within a limited budget;
- Be available to start immediately.
- Knowledge and Experience in the following areas would be favourable
 - Public Health,
 - HIV/AIDS/TB environment

- Non Profits
- Public sector
- Donor environment

1.4. TASKS TO BE CARRIED OUT

- Review the existing plan;
- Compile a report on the current plan;
- Conduct consultation processes with internal and external stakeholders;
- Compile a strategic plan for 2022-2027 in soft and hard copy format that is ready for publication.

1.5. DELIVERABLES TO BE GENERATED

No.	Key Deliverable	Description	Estimated Timeline
1	Workplan outlining the assignment	A time-based work plan in MS Word identifying activities, methodology and required resources outlining start and end dates.	22 September 2021
2	Compile a report on the current Strat Plan	This includes reviewing the implementation of the existing Strategic Plan and compiling a report in MS Word documenting: <ul style="list-style-type: none"> • Existing gaps and constraints identified; • What was accomplished; and • What could have been done better. 	29 October 2021
3	Conclude consultations	To generate sufficient buy-in so that the Strategic Plan will be well supported both inside and outside the organization. Internally, this may include members of the Board of Directors, Management and other staff. External stakeholders may include Donors, Government, Civil Society and other that you may identify.	30 November 2021
4	Progress Reports	Written Progress Report	Fortnightly
5	Draft Strategic Plan	As per agreed in inception report	30 November 2021
6	Finalised Strategic Plan	Agreed changes to the draft report should be reflected in the final report.	10 December 2021

1.6. WORKPLAN AND MILESTONES FOR PAYMENT

The consultant should be available to start immediately. The proposed timeframes below will be negotiated and confirmed during contracting.

ACTION	RESPONSIBLE	DATE
Quotation and proposal submission	Service Provider	10 September 2021
Appointment and contracting of Service Provider	NACOSA	15 September 2021
Briefing and planning meeting (<i>via Teams</i>)	Service Provider & NACOSA	16 September 2021
Inception Report	Service Provider	22 September 2021
Review of existing Strategic Plan	Service Provider	29 October 2021
Strategic Plan 2022 to 2027 DRAFT	Service Provider	30 November 2021
Strategic Plan 2022 to 2027 FINAL		10 December 2021

All payments will be made in South African Rand (ZAR) into a designated South African Bank Account. The consultant(s) will submit invoices for payment in accordance with the final workplan and milestones.

1.7. BUDGET

The budget for this assignment is limited. Quotations should take into consideration that NACOSA is a non-profit and public benefit organisation. **Preference will be given to bidders who provide value for money.**

The quotation must include itemized costing per deliverable and include all costs related to the deliverables. All amounts to be clearly stated in South African Rand (ZAR) EXCLUSIVE OF VAT. The budget template provided as **Annexure A** can be used as an example on the minimum information to be provided.

2. SUBMISSION OF PROPOSALS

Submissions must be made by 10 September 2021 to mariette@nacosa.org.za. Any questions must be made in writing to mariette@nacosa.org.za.

Interested consultants should submit:

1. **Written Proposal** (max 2 pages) and **Implementation Plan** (1 page):

The proposal should briefly set out:

- The conceptual basis of your understanding of why the particular form of the strategic plan you are envisaging is appropriate for the task at hand. For example, you may wish to use scenario planning or a visioning exercise to position the current Strategic plan within a longer-term vision.
- The methods that you will use to:
 - Review the implementation of the current Plan
 - Undertake a processes that will build ownership by the collective at NACOSA and buy-in from the external stakeholders
 - Gather information for the write up of the 2022 -2027 Strategic Plan
- Demonstrate an understanding of how the strategic planning process can complement an ongoing transformation and organizational growth and development process within the organisation. This understanding should identify the necessary areas of the Strategic plan that would require an alignment with internal processes.
- The different components of the work that will be undertaken could include a situational /contextual analysis of the external and internal environment.

2. **A quotation** for performing the work (cost estimate to clearly reflect the daily/hourly rate of consultant(s) proposed to work on the project). *Annexure A has been provided as an example of the minimum information to be provided.*

3. **Profile and/or CV's** of the consultant(s)

- Demonstrated experience in the form of examples of work done in the development of Strategic Plans of this nature and /or related work that will assist the evaluation process. If these are not available, other forms of evidence like letters of recommendation will also be considered.
- Details of the individuals that will be working directly on the project;
 - Identify their roles and level of effort;

- Clearly outline their educational background, skills and experience;

3. APPOINTMENT OF SERVICE PROVIDER

Evaluation Criteria

Submissions will be evaluated by NACOSA against the following criteria:

1. Creativity of proposal and understanding of the scope of work
2. Track record of strategic engagement and strategic writing for similar organisations
3. Experience in the civil society
4. Technical capacity to deliver

NACOSA reserves the right to invite bidders for presentations / interview before the award of the contract. At least two days' notice will be given to bidders to prepare for this meeting. The meeting will be conducted virtually via ZOOM/MS TEAMS or face to face observing all COVID protocols.

NETWORKING HIV & AIDS COMMUNITY OF SOUTHERN AFRICA

NACOSA

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Non Profit Organisation: NPO 017-145A | Public Benefit Organisation: PBO 18/11/13/1602 Non

Profit Company: NPC 2015/448924/08 | VAT registered, number: 473 0273 234

Section 18A Tax Exempt | Accredited by the Health & Welfare SETA | Level 2 B-BBEE Entity (110% recognition)

Nacosa.org.za