



human settlements

Department:
Human Settlements
REPUBLIC OF SOUTH AFRICA

**TERMS OF REFERENCE TO UPDATE THE CURRENT HOUSING
BIBLIOGRAPHY**

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1. BACKGROUND

Empirically generated knowledge is an important element in policy development and review. For the National Department of Human Settlements it is imperative that the Department stay abreast of knowledge developed about the South African Housing situation. This allows the department to be informed and guided by research efforts of Provinces, Municipalities and Housing Institutions, as well as ensuring that key contributions from Academic Institutions, Non-Governmental Organisations (NGOs), Community Based Organisations (CBOs), Consultants and Professional Associations find space in policy development and practice. The Department utilises a variety of tools realise this goal; one of which is the collation of research pieces developed in different areas of human settlements into an annotated bibliography.

The bibliography assists the Department to keep track of new developments and research in the human settlements field which in turn informs and guides it in pursuing its mandate. The Bibliography is an essential/critical tool for the Department; the human settlements research Community and other stakeholders. It provides a central point of reference for reading material on human settlements policy and developments.

The housing bibliography was initiated in 2003 and updated in 2007, three years after the approval of the Comprehensive Plan for the Development of Sustainable Human Settlements, the Breaking New Ground (BNG). In line with the identified thematic areas of the Research Agenda for the medium term 2004-2008, the 2007 bibliography was a collation of published papers, books and research reports on the following themes:

- Public Finance and BNG
- Funding For BNG
- Scale delivery

- Institutional Capacity and Reform
- Land Planning and Property Markets
- Developmental State and BNG
- Different Interpretation of BNG
- Demand and Supply

The Department intends to update the existing bibliography to include literature developed between 2007/8 and 2010/11. The proposed bibliography should focus on the following thematic areas while also updating work that has been done on the themes from the previous bibliography:

- Demographics and migration trends
- Private and public funding for human settlements development
- State capacity to deliver sustainable human settlements
- Revitalising Local democracy and building social capital through human settlements development
- Economics of housing and the performance of the property market
- Rental housing
- Social Cohesion
- Possible future trajectory of the human settlements programme
- Urbanisation and Urban land

2. SCOPE OF WORK

This brief calls for the update of the housing bibliography of 2007. Specifically the scope of work includes the following:

- 2.1. A survey of existing research and other publications developed between 2007/08 and 2010/11, pertaining to housing development and sustainable human settlements.

- 2.1.1. This should include work done about South Africa both locally and internationally, published and forthcoming/unpublished.
 - 2.1.2. The survey should build on the existing housing bibliography (accessible on the Department's website) to ensure alignment and continuity.
- 2.2. Based on the survey, a compilation of the bibliography of research, articles, books, etc developed between 2007/08 and 2010/11.
 - 2.2.1. The bibliography should include work done about South Africa both locally and internationally, published and forthcoming/unpublished.
 - 2.2.2. The bibliography should be organised per theme and compiled using the Harvard referencing method.
- 2.3. An annotation which guides and assists the readers to understand the authors, core arguments of the articles/books/thesis etc, and the value the citation entry adds to human settlements debate. The annotation must show a critical analytical engagement with the recorded citations.
- 2.4. An assessment of areas that still require research to support the development of sustainable human settlement in the country.

3. DURATION OF THE ASSIGNMENT

- 3.1. The assignment should not take more than 16 weeks (four months) from the date the service provider is appointed.

4. DELIVERABLES

The following deliverables are anticipated from the project

- 4.1. Updated bibliography of knowledge developed in human settlements, this should cover the entire sector (government, private and non-governmental etc).

- 4.2. The bibliography should have a summary of key issues addressed by the collective literature per theme.
- 4.3. Identification of areas needing further research
- 4.4. The final bibliography should be submitted in three (3) Compact Disks and 3 bound copies printed in colour. The documents should be written in 12 pts Arial, 1½ s pacing, justified and in both PDF and MS Word formats. No branding of the service provider would be allowed in any of the documents submitted;
- 4.5. All documents must be language edited.

5. ASSESSMENT CRITERIA

- 5.1. The evaluation of proposals will be done in two steps: in the first step the proposal would be assessed on functionalities and capacity to deliver and the second step will evaluate proposed budgets and HDI status.

The functionalities and capacity evaluation would be as follows:

Criteria	Sub Criteria	Sub value	Total Value
Levels of expertise	Project Manager qualifications:		30
	○ Masters/ PHD degree in human settlements related field	20	
	○ Honours Degree in human settlements related field	10	
	Key research team members		
	○ Master degree in human settlements related field	10	
	○ Honours degree in human settlements related field	5	

Criteria	Sub Criteria	Sub value	Total Value
Experience	Previous experience:		40
	○ Completed five or more similar tasks	10	
	○ Completed between one and four similar tasks	05	
	Human Settlements research experience		
	○ Has completed 10 and more human settlements related researches	20	
	○ Has completed between five and nine human settlements related researches	10	
	Publication experience		
	○ Has five or more peer reviewed publications	10	
	○ Has between one and four peer reviewed publications	05	
Understanding of scope of work	<ul style="list-style-type: none"> • Detailed and sound proposal on how the project will be carried out 	20	20

Criteria	Sub Criteria	Sub value	Total Value
capacity to deliver	<ul style="list-style-type: none"> Member of a recognized research or human settlements related network/association 	05	10
	<ul style="list-style-type: none"> Ready access to a number of libraries and journals both in South Africa and internationally. 	05	
Total			100

- 5.2. The proposal that scores less than 70 points out of the 100 in respect of functionalities and capacity to deliver will be regarded as having submitted a non-responsive proposal and will be disqualified;
- 5.3. The Department reserves the right to shortlist an acceptable number of candidates who might be requested to make a presentation before the appointment of a service provider.

6. GENERAL CONDITIONS

- 6.1. The tender will be valid for a period of 90 days. The prices quoted in the tender remain applicable unless and until the national DHS is notified to the contrary by the service provider;
- 6.2. The service provider must furnish the following information as comprehensively as possible:
- 6.2.1. Full details of the service provider
 - 6.2.2. Head office address and email
 - 6.2.3. Telephone and fax numbers
 - 6.2.4. Level of technical competency
 - 6.2.5. Company profile

- 6.2.6. Full details of the individuals to be involved, their expertise, track record and roles in the assignment;
 - 6.2.7. A detailed cost breakdown of the tender prices. Preference will be given to fixed price contracts linked to clearly identifiable deliverables;
 - 6.2.8. Clearly defined milestones, correlating to the sections outlined in this invitation; and
- 6.3. The successful service provider would be expected to submit a project initiation proposal which gives detailed information on the processes to be followed and work break down schedule, which will be submitted presented to the NDHS seven (7) days after appointment;
 - 6.4. Regular progress report should be submitted to the Department, indicating the key developments in the time period reported on, future activity schedule, and obstacle if any that are being encountered together with the suggested solutions to the challenges.

7. Payment structure

- 7.1. Payment for the delivery of the work will be conducted on the following manner:
 - 7.1.1. 50% of the total amount shall be paid upon the submission and approval of the draft report.
 - 7.1.2. 50% shall be payable upon the approval and acceptance of the final report.

8. COPYRIGHT

- 8.1. Upon completion of the assignment, the copyright of the submitted bibliography will be held by the Department of Human Settlements.

8.2. The service provider shall not publish, whether in part or in whole, the Bibliography without prior approval from the Department.

9. ENQUIRIES

Enquiries related to this terms of reference can be directed to Matodzi Amisi
012 444 5046/ Matodzi.amisi@dhs.gov.za