REQUEST FOR QUOTATION

RFQ No.:	Contact Person:
BS/2021/RFQ462	Jack Serite
RFQ Issue Date:	**Contact Details:**
Request for quotation – 18 March 2022	011-805-9661
Closing Date: 25 March 2022 at 11:00am	jacks@bankseta.org.za
Description of services/products required:	
APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE BANKSETA's STAKEHOLDER SATISFACTION SURVEY/S	

Part A: Request for Quotation Documentation

- ✓ Cover Letter;
- ✓ Terms of Reference / Specifications;

Part B: Returnable Documents and Schedules:

- ✓ **Returnable Documents which must accompany the quotation**
  - Certified B-BBEE Rating Certificate.
  - CSD Master Registration report.
- ✓ **Returnable Forms which must accompany the quotation**
  The forms must be fully completed, signed and dated appropriately (see annexure)
  - SBD 4: Declaration of Interest.
  - SBD 6.1 Preference points Claim Form
  - SBD 8: Declaration of bidder's past Supply Chain Management practices.
  - SBD 9: Certificate of Independent Bid Determination.

PLEASE NOTE:

- ✓ Supplier must be registered on the National Treasury Central Supplier database;
- ✓ The quotation must be on the supplier's letterhead;
- ✓ Quotations must be in accordance with the specifications, unless otherwise stipulated;
- ✓ Where applicable, the official pricing structure must be used. Should the allocated pricing page / information be insufficient, you may include an additional copy of the price page;
- ✓ Suppliers must complete all the Returnable Schedules and also submit all the Returnable Documents
- ✓ Suppliers are advised that the 80/20 preference points system shall be applied in the evaluation of quotations.

Enquiries with regard to specifications may be directed to:

Name: Jack Serite **Telephone No: 011 805 9661**
Email : jacks@bankseta.org.za

TENDER CLOSING		
CLOSING DATE	**CLOSING TIME**	**MODE OF SUBMISSION**
25 March 2022	**11:00am**	**Electronic pdf sent to:** **jacks@bankseta.org.za** **and** **scm@bankseta.org.za**
BRIEFINNG SESSION		
BRIEFING DATE	**BRIEFING TIME**	**BRIEFING LOCATION**
N/A	**N/A**	**N/A**

1. BANKSETA BACKGROUND

The Banking Sector Education and Training Authority (BANKSETA) is the SETA for banking and alternative industry. It is a statutory body established through the Skills Development Act of 1998 as amended by the Skills Development Act, 26 of 2011 to enable its stakeholders to advance the national and global position of the banking and alternative banking sector. As guided by its mandate, the BANKSETA is as such an agent of transformation and seeks to promote employment equity and broad-based BEE through skills development.

For further details on the BANKSETA, visit www.bankseta.org.za and refer to the 2020 – 2021 annual report under media center/ publications/annual reports.

2. PURPOSE AND OBJECTIVES OF THE PROJECT

2.1. The BANKSETA seeks to appoint a service provider to conduct the annual Stakeholder Satisfaction Survey for period of (02) two years.

2.2 The survey will be conducted with stakeholders which the BANKSETA has provided services to and engaged with. BANKSETA will provide the stakeholders details. These include.

2.2.1 Consists of internal (staff)

2.2.2 External stakeholders comprising of unemployed learners, employed beneficiaries, accredited training providers, financial cooperatives, small, medium, and large companies within the banking and alternative banking sectors, non-governmental organisations, legislative bodies, institutions of higher learning, industry bodies, service providers, media and the general public.

3. SCOPE OF WORK

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3.1 To assess stakeholders' overall satisfaction and perceptions of BANKSETA services (projects being implemented; interaction with BANKSETA employees) and whether their service expectations are met; through an online survey.

3.3 To assess stakeholders' overall satisfaction and perceptions of BANKSETA and whether their service expectations are met.

3.1 The service provider to conduct two online focus group meetings in all nine provinces. The focus group discussions should not exceed two hours in duration and should comprise of all targeted stakeholder categories

3.4 To review the previously used instrument/s or questionnaire/s and make recommendations for improvement.

3.5 To determine the quality-of-service delivery as perceived by BANKSETA stakeholders.

3.6 Compare the results to what was gathered in the preceding year.

3.7 The service provider to analyse information gathered and recommend action plan for improvements.

3.8 For reporting purposes, the service provider is required to using statistical analysis using a 5-point rating scale.

3.9 Assess internal stakeholder's satisfaction levels rendered by various BANSKETA departments.

3.10 Prepare and deliver a comprehensive report detailing the methodology applied, findings, and recommendations from the assessment.

3.11 The provider must make alternative provisions to follow up with participants in the event where the response/completion rate is deemed unsatisfactory or less than what is expected/targeted, and;

3.12 Present the overall results of the study to staff members, Executive committee, and the board on different dates.

3.13 BANKSETA will provide the questions to be used in the survey as well as past survey questionnaires.

4. RESEARCH DESIGN AND METHODOLOGY

4.1 The service provider is required to make use of a mix of quantitative and qualitative research methods and conduct the survey taking into consideration the following.

- 4.1.1 Study external population (2000) and Internal 64 (Internal)
- 4.1.2 The sample size should not be less that 50 percent of population (that is both external and internal)
- 4.1.3 Administration of Research Tools
- 4.1.4 Data Analysis

5 COMPETENCY AND EXPERTISE REQUIREMENTS

5.1 Provide three (02) signed references on client's letterhead of successfully executed a research project focusing on customer stakeholder(s) satisfaction survey(s) in the past five (05) years.

5.2 The project team should include at least one Manager and two resources to deliver the services

5.2.1 Project team manager should have a relevant experience in managing and overseeing research project implemented. The CV and qualification(s) should be submitted.

5.2.2 Each of the project team members should have relevant experience in conducting research services. The CVs and qualification(s) should be submitted.

5.3 Provide a detailed project plan inclusive of all the phases. from the initiation to the closure.

(a) Initiation (scoping all resources)
(b) Planning (detailing a road map)
(c) Execution/implementation
(d) Reporting/closure

5.4. Provide a preliminary, and final report and conduct two presentation sessions for the board and staff as an when required.

5.4 **DURATION OF THE CONTRACT**

5.4.1 The contract will be valid from the contract signing date by both parties for a period of two (02) years.

5.4.3 The work should be finalised within the contract period. However, the timing of sittings of the different committees where the reports need to be presented may be outside the two-year period. Then, the BANKSETA may extend the contract period to cover presentations after the two-year period.

6. PRICING STRUCTURE

N.B: The Pricing Schedule must be completed as per the attached annexure A.

6.1 The quoted prices will remain fixed for the particular year of the contract.

6.2 The attached pricing sheets (Appendix A) must be completed in full. Failure to comply with be disqualified because it will be impractical to compare across all submissions. The BANKSETA will not entertain pricing adjustments after the signing of contract,
and it is therefore important that all pricing elements are disclosed.

6.3 The pricing sheet should show VAT separately.

6.4 Sufficient detail should be included to enable the BANKSETA to fully understand the make-up of the overall pricing.

6.6 All pricing assumptions, excluded costs and estimated costs must be clearly documented. The BANKSETA assumes that the pricing document as supplied is complete and covers all costs associated with this project.

7. SUBMISSION REQUIREMENTS

7.1 Submission of the Request for quotation must be on PDF and on emails follows

RFQ CLOSING		
CLOSING DATE	**CLOSING TIME**	**MODE OF SUBMISSION**
25 MARCH 2022	**11h00 am**	**Electronic pdf sent to:** **jacks@bankseta.org.za** **and** **scm@bankseta.org.za**

8. ENQUIRIES/COMMUNICATION

Contact person for enquiries regarding the RFQ document:

Mr Jack Serite

Title: Specialist: Supply Chain Management Unit

Email: jacks@bankseta.org.za copy scm@bankseta.org.za

All clarifications or enquiries must be made in writing and received by the BANKSETA at least 3 working days before closing date of this RFQ. Telephonic requests for clarification will not be accepted.

9. EVALUATION/ADJUDICATION

Proposals will be evaluated in three phases:

9.1 Compliance/eligibility (Proposals that do not pass the compliance eligibility evaluation will be disqualified from participating in the next evaluation)

9.2 Technical/Functionality (Proposals that do not meet the minimum threshold indicated in clause 12 will not participate in the final evaluation)

9.3 Price and BBBEE Evaluation (Proposals will be appointed on the highest scores)

10. COMPLIANCE/ELIGIBILITY EVALUATION

Respondents who do not meet the requirements below **will be** immediately disqualified.

NB: (For Joint Venture (JV) submissions each partner to the JV must submit all documents listed below).

N.B All relevant forms/documents as prescribed by the PFMA Regulation: Framework for Supply Chain Management accompanying this document must be completed in full and signed where applicable by a duly authorized official of the primary contractor / bidder.

Item	**Description**
1.	Submission of a proposal (response document)
2	Submission of the following fully completed and signed returnable documents: - SBD 1 Invitation to submission - SBD 4 Declaration of interest - SBD 6.1 preference point claim form - SBD 8 Declaration of respondents' past supply chain management - SBD 9 Certificate of independent bid determination
3.	The service provider should show details the existing Research online system it uses. The service provider should state at least: **3.1** The name of the research online system used and **3.2** the years which they had been using the system
4	Submission of the service providers current Central Supplier Database report

11. FUNCTIONAL/TECHNICAL EVALUATION CRITERIA

CRITERIA	**POINTS**
1. Project Manager Experience and a minimum NQF 7 (Bachelor's degree or Advanced Diploma) Qualification.	**30**
Project Manager experience in managing and overseeing research project/s implemented. The service provider should submit the Project Managers CV and qualification(s) BANKSETA will evaluate as follows; (a) NQF7 level qualification and less than 1-year experience in conducting research = 0 points (b) NQF7 level qualification and 1 to less than 2 years' experience in conducting research = 1 Point	

(c) NQF7 level qualification and 2 to less than 3 years' experience in conducting research = 2 Points (d) NQF7 level qualification and 3 to less than 4 years' experience in conducting research = 3 Points (e) NQF7 level qualification and 4 to less than 5 years' experience in conducting research = 4 Points (f) NQF7 level qualification and 5 years or more experience in conducting research = 5 Points	
2. Team qualification and experience **The service provide should have a team of (02) two people.** **The service provider should submit the qualification and cv of each team member.** **The points will be awarded on team's average years of experience of the team members in conducting research.** **Each Team member should have NQF Level 6 (National Diploma or an Advance Certificate) in any discipline.** **The experience of the team member will not be considered if the NQF Level 6 qualification is not submitted.**	**25**
BANKSETA will evaluate as follows: (a) NQF6 level qualification and less than 1-year experience in conducting research = 0 points (b) NQ6 level qualification and 1 to less than 2 years' experience in conducting research = 1 Point (c) NQF6 level qualification and 2 to less than 3 years' experience in conducting research = 2 Points (d) NQF6 level qualification and 3 to less than 4 years' experience in conducting research = 3 Points (e) NQF6 level qualification and 4 to less than 5 years' experience in conducting research = 4 Points (f) NQF6 level qualification and 5 years or more experience in conducting research = 5 points	
3. Company experience in conducting research study.	**25**
The service provider should provide a minimum of (02) reference letters signed references on client's letterhead of successfully executed research projects focusing on conducting surveys performed within the past five (05) years (counting from closing date of this request.) -. The letters must. - Be signed and dated - Show the contact's name, email address and/or telephone/ cellphone number - Be on client's letterhead - Should show the research conducted and the date (month and year) done,	

BANKSETA will evaluate as follows: a) 2 reference letters= 3 points b) 4 and more reference =5 points	
4. **Project Plan**	**20**
The provider should include a detailed project plan showing the minimum of below phases (a) Initiation (scoping all resources) = Point 1 (b) Planning (detailing a road map) = Point1 (c) Execution/implementation = point 2 (d) Reporting/closure = point 1 The Project plan must be aligned to the timeframe as outlined in section 5 above	
TOTAL WEIGHTING/PERCENTAGE	**100**
MINIMUM WEIGHTING THRESHOLD TO PASS TECHNICAL/FUNCTIONAL EVALUATION	**70**

The minimum weighting threshold for technical / functional evaluation is 70%. Any proposal scoring less than 70% or 70 weight will be disqualified from further evaluation. Each criteria shows how it will be evaluated out of 5 points.

12. FUNCTIONALITY WILL BE EVALUATED USING THE FOLLOWING FORMULA FOR EACH CRITERION:

Pf = (So/Ms) x Ap

Where:

- Pf – is the percentage scored for functionality for the criteria under consideration.
- So – is the total score in points (from 1 to 5) of the criteria under consideration
- Ap – is the percentage allocated for functionality.
- Ms – is the maximum score possible per criteria which is equal to 5

Each criteria shows how it will be evaluated out of 5 points.

BANKSETA adds all the percentages from each criteria to arrive at the final total technical/functional percentage.

Any proposals not meeting a minimum threshold of 70 percentage or weighting on functionality will be disqualified from participating in the next evaluation.

13. Pricing will be evaluated using the following formula:

80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

80/20

$$Ps = 80\left(1 - \frac{Pt - P\min}{P\min}\right)$$

Where

Ps **=** Points scored for price of bid /quotation under consideration.

Pt **=** Price of bid/quotation under consideration.

Pmin **=** Price of lowest acceptable bid/quotation.

14. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

In terms of Regulation 6 (2) and 7 (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	**14**
4	**12**
5	**8**
6	**6**
7	**4**
8	**2**
Non-compliant contributor	**0**

The points scored by a bidder in respect of the B-BBEE contribution will be added to the points scored for price to arrive at the overall score.

Points will be rounded off to the nearest 2 decimals.

If two or more proposals have scored equal total points, the contract will be awarded to the bidder scoring the highest number of points for the specified goals or B-BBEE contribution.

15. COMPLIANCE STATUS

15.1 The BANKSETA, before making an award, shall check on the central supplier database (CSD) whether.

(a) the bidder or any of its directors are not listed / indicated as from doing business with the public sector, and person prohibited. Should the CSD be incorrect the service provider may provide evidence in regard to this.

(b) the bidder's tax status is compliant.

(c) the bidders, its directors or management are not employees of the state.

15.2 The BANKSETA will not award any proposals to service providers who do not +- comply with the above.

16. The validity period of proposals is 90 days after closing.

17 JOINT VENTURE

17.1 In the case of a Joint Venture, the following will be Applicable:

17.2 Each JV Member must have a CSD report showing tax status and any other.

17.3. Submission of a signed Joint Venture Agreement by the JV Partners and attached to this RFQ document; and

17.4 Submission of a Joint Venture BBBEE Rating Certificate.

ANNEXURES TO BE COMPLETED AND ACCOMPANY THE QUOTATION

- Certified B-BBEE Rating Certificate.
- SBD 4: Declaration of Interest.
- SBD 6.1 Preference Points Claim Form
- SBD 8: Declaration of bidder's past Supply Chain Management practices.
- SBD 9: Certificate of Independent Bid Determination.
- CSD Master Registration Report. (Updated CSD)