



## **REQUEST FOR QUOTATIONS (RFQ)**

**Description of Services/Goods: Specialist Integrated Annual Report Writing Services**

**Request date: 14 February 2023**

**Closing date: 22 February 2023 (No late submissions will be considered)**

**Closing time: 13:00pm**

### **Supporting Documents**

The following copies must be attached when returning the RFQ:

1. Copy of a valid B-BBEE Certificate/ Sworn Affidavit (Non disqualifying item but non-submission will render the bidder as non-compliant for B-BBEE points).
2. CSD Registration Summary Report,
3. Tax Compliance Status Pin -No award will be made to the bidder who failed to supply NHFC with a tax compliant proposal

### **Compulsory Requirements**

4. Submission of the following Signed and Completed Standard Bid Documents (SBD) Forms which are attached to this request:
    - SBD 4: Bidder's Disclosure-failure to complete and sign the SBD document will render your bid non-responsive.
    - SBD 6.1 Preference Points Claim Form in terms of preferential procurement-failure to complete and sign the SBD document will render your bid non-responsive.
  5. All quotes must be prepared according to the Scope of Work/Key Deliverables
-

The assessment of the submission will be based on the above-mentioned documentation. Exclusion of required items may cause a disqualification. Bidders who fail to submit the required supporting documents with their bids will be requested to submit them within **24 hours** of the closing of bid for inclusion in the Bid for evaluation, if a bidder fails to submit the required supporting documents within the stipulated time, their bid may be rejected.

Enquiries and quotations regarding the RFQ must be directed to the below persons in writing only:

**SCM Enquiries**

SCM Official: Anda Mazibuko

Email: [Quotations01@nhfc.co.za](mailto:Quotations01@nhfc.co.za)

## SPECIFICATIONS

### Specialist Integrated Annual Report Writing Services

#### 1. Introduction

The National Housing Finance Corporation (NHFC) was established by the National Department of Human Settlements as a development finance institution (DFI) in 1996, with the principle mandate of broadening access to affordable housing finance for the low- and middle-income households.

NHFC is a national public entity, and adheres to the regulatory framework of the Public Finance Management Act (PFMA) of 1999.

The NHFC provides wholesale funding in the affordable housing market mainly to social housing institutions, non-banking retail intermediaries, privately owned property developers, construction companies and investors. It also provides loans and other form of wholesale funding (equity and quasi equity) to certain niche businesses that are in the affordable housing market.

#### 2. Background of the RFQ

Annual reports are an integral part of NHFC reporting. The achievements, performance information, governance, human resources information and financial information for each reporting period are reported in the annual report.

Annual reports are tabled in Parliament and the relevant Provincial Legislatures and are public documents. The publication of financial and non-financial information of departments promotes accountability and transparency on the efficiency and effectiveness of government departments. This will improve trust and confidence in government service delivery. The reported information must be accurate and balanced, reporting the successes and explaining

the shortcomings. Ultimately a quality annual report should (i) comply with statutory and policy requirements, and (ii) present information (both positive and negative) in an understandable and concise manner

### 3. Purpose

The purpose of this RFQ is to solicit quotations from potential service providers.

To produce / package the integrated annual report which includes the conceptualisation of the principle themes and sub-themes of the integrated reports, and, if required, the development of clear strategic narratives to contextualise and clarify disclosures.

The integrated annual report sets out how the organisation's strategy, governance, performance and prospects lead to the creation of value. The purpose of the NHFC's integrated annual report is to explain to stakeholders how it works, and to provide a balanced accurate reflection of the entity's strategy, performance and future outlook. The integrated annual report is an integral part of public entities reporting, and it is in accordance with the national treasury guidelines, PFMA, IIRC framework.

### 4. Scope of work

The NHFC requires the quote on the following item(s) indicated below:

The successful bidder shall demonstrate skills of packaging clear understanding and writing integrated annual reports for the public and private sectors with over 8 years' experience and will have to demonstrate a clear understanding of integrated reporting and have knowledge of key disclosure frameworks.

A. The service provider will be responsible for:

- researching and writing certain portions of the report such as table of contents, headlines, subheads, introductory summary, captions, cutlines, credit and, legends, labels, and "Alt" tags for all image files used

- the NHFC will provide the data to the service provider to work with
  - editing and proofreading all data provided to the service provider by the NHFC
  - compiling, revising and editing the entire annual report as NHFC requests, so as to create a well-written and well-organised document that reflects a logical flow of ideas and compelling presentation of information.
  - drafting the Minister's message for approval
- B. The NHFC will provide to the service provider:
- approved text for the CEO's Letter, Chairperson's Letter, Overview, etc.
- C. Under the designated NHFC supervisor and with his or her consent, the service provider will collect, confirm or clarify information as needed from NHFC staff and other public stakeholders in person, by telephone or by email.
- D. The service provider will revise and edit — subject to approval and acceptance by NHFC — all data to be included in the report, whether written by the contractor or supplied to the service provider by NHFC. The NHFC and the service provider will work together until a final product is realised.
- E. Bidders responding to this RFQ should describe how they propose to manage the iterative editorial process including tracking changes. Report data is expected to be converted into MS Word or other processing software after the PDF is finalised. Bidders should allow sufficient time for NHFC's response to and approval of revisions of content.
- F. The service provider and NHFC will exchange all copy, other data by email or other means of electronic data exchange or transfer. Upon request and with reasonable notice, the NHFC supervisor will arrange for a limited number of meetings in person between NHFC staff and the service provider, generally at NHFC's offices or online.

#### **Outputs:**

- Delivery of an integrated annual report focusing on each one of the six capitals
- Final draft of the report to be delivered by the 30 April 2023.

#### **Time schedules:**

The assignment will take four months and conclude with the submission by end May 2023.

#### 4.1 Lockdown Operations Provisions

Kindly note that due to the Lockdown Regulations, NHFC will be operating remotely, therefore service providers should make required provision of virtual meetings.

### 5. EVALUATION CRITERIA

#### Criterion 1 – Compulsory Requirements

Bidders will first be evaluated in terms of the gatekeeper/minimum requirements on page 1 of this document. Bidders who do not fulfil all the requirements or do not submit the required documents will not proceed to the next phase of functionality. Those who fulfil all the requirements or have submitted the required documents will be further evaluated on functionality.

#### Criterion 2 – Functionality

Functionality is worth 100 points. The minimum threshold is **80** points. Bidders who score less than **80** points on functionality will therefore be disqualified. Bidders who score **80** points and above will be further evaluated in terms of price and preference points. The functionality evaluation is broken down as follows:

#### 5.1 Phase 1 -Technical Evaluation

| Category | Criteria   | Sub-category | Points |
|----------|--|--------------|--------|
| 1.       | <b>Experience and Expertise</b>  |              |        |
|          | <ul style="list-style-type: none"> <li>Experience of the bidding company in this scope of engagement dealing with writing of integrated reports. (3 or more signed reference letters to be submitted from Companies where similar service has been conducted by members of the team in the past five years).<br/>Five points for each relevant reference letter submitted</li> </ul> | 15           |        |

| Category | Criteria  | Sub-category | Points |
|----------|---|--------------|--------|
|          | <ul style="list-style-type: none"> <li>In-depth knowledge and experience of Head Writer in packaging clear understanding and writing integrated annual reports for the public sector, minimum of 8 years' experience. Experience within the financial services sector will be an added advantage. (Detailed CVs, qualification and copies of certificates must be submitted)</li> <li>Content writer: 8 years = 10 points <ul style="list-style-type: none"> <li>➤ 5 years: 5 points</li> <li>➤ 3 years: 1 point</li> <li>➤ &lt;3 years: 0 points</li> </ul> </li> <li>Proof-reader: 8 years = 10 points <ul style="list-style-type: none"> <li>➤ 5 years: 5 points</li> <li>➤ 3 years: 1 point</li> <li>➤ &lt;3 years: 0 points</li> </ul> </li> </ul> <p>NB: Copywriter to have experience in copywriting for Integrated Annual Reporting. CVs must include examples of written pieces for Integrated Annual Reports.</p> | 35           |        |
| 2.       | <p><b>Approach and Methodology</b></p> <p>The successful bidder should demonstrate knowledge of integrated report writing in accordance with relevant guidelines and key disclosure frameworks:</p> <ul style="list-style-type: none"> <li>An understanding of International Integrated Reporting Council (IIRC) Framework</li> <li>Demonstrated understanding of key legislation, i.e. King IV, Public Finance Management Act (PFMA) and South African Treasury integrated reporting requirements</li> <li>Demonstrated understanding of GRI-G4</li> <li>Demonstrate how NHFC applies the Integrated Reporting Framework focusing on reporting on the six capitals.</li> </ul>   | 30           |        |

| Category | Criteria   | Sub-category | Points     |
|----------|--|--------------|------------|
|          | NB: The bidder must submit PDFs of three different entities or companies Integrated Annual Reports completed in the last five years plus contactable references for each report. |              |            |
| 3.       | <b>Project Plan</b>  |              |            |
|          | Clear timelines outlining how dates the project will be carried out from beginning to the end.   | 20           |            |
|          | <b>TOTAL</b>   |              | <b>100</b> |

### Criterion 3- Price and BBBEE evaluation

All bids that achieve the minimum qualifying score of **80** points for Functionality, (acceptable bids) will be evaluated further in terms of the 80/20 preference point system. The preference point's claim is in terms of the Preferential Procurement Regulations 2017.

As per the table below, price is evaluated over 80 points and preference points over 20:

### 5.2 Phase 2 - Price and Preference Evaluation



Bidders will be evaluated in terms of Price and Preference points (B-BBEE status level of contributor). As per the table below, price is evaluated over 80 points and preference points over 20:

| B-BBEE Status Level<br>Of Contributor | Number of Points       |
|---------------------------------------|------------------------|
|                                       | Bids up to R50 million |
| 1                                     | 20                     |
| 2                                     | 18                     |
| 3                                     | 16                     |
| 4                                     | 12                     |
| 5                                     | 8                      |
| 6                                     | 6                      |
| 7                                     | 4                      |
| 8                                     | 2                      |
| Non-Compliant contributor             | 0                      |

#### Special Conditions:

- Quotations must be submitted in the bidder's company letterhead.
- No pre-payments are allowed, awarded bidder will be paid within 30 days after receipt of invoice.
- Quotation submitted should be based on Scope of Work/Key Deliverables. Failure to adhere to scope of will render your quotation non-responsive.
- Price(s) quoted must be valid for at least 30 days from the date of your offer and be according to the RFQ document.
- Price(s) quoted must be firm and inclusive of VAT (If VAT registered) and inclusive of all cost

- Supplier to indicate excepted delivery of service/goods as indicated in Scope of Work/Key Deliverables.
- Supplier will be evaluated on performance based on delivery of Scope of Work/Key Deliverables
- The quotation must be submitted via email to [quotations01@nhfc.co.za](mailto:quotations01@nhfc.co.za)

## **BIDDER'S DISCLOSURE**

### **1. PURPOSE OF THE FORM**

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### **2. Bidder's declaration**

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

| <b>Full Name</b> | <b>Identity Number</b> | <b>Name of State institution</b> |
|------------------|------------------------|----------------------------------|
|                  |                        |                                  |
|                  |                        |                                  |
|                  |                        |                                  |

<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

|  |  |  |
|--|--|--|
|  |  |  |
|--|--|--|

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

**YES/NO**

2.3.1 If so, furnish particulars:

.....

.....

### 3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However,

communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.

- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING

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<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS  
DECLARATION PROVE TO BE FALSE.

.....  
Signature Date

.....  
Position Name of bidder

**SBD 6.1**

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL  
PROCUREMENT REGULATIONS 2017**

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

**1. GENERAL CONDITIONS**

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

a) The value of this bid is estimated to exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

|  | POINTS     |
|--|------------|
| <b>PRICE</b>   | <b>80</b>  |
| <b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>                | <b>20</b>  |
| <b>Total points for Price and B-BBEE must not exceed</b> | <b>100</b> |

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor

together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

- 1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

## 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;



(i) “**QSE**” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(j) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

### 3. POINTS AWARDED FOR PRICE

#### 3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

**80/20**

**or**

**90/10**

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of bid under consideration

$P_{\min}$  = Price of lowest acceptable bid

### 4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

4.1 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 (90/10 system) | Number of points (80/20 system) |
|------------------------------------|---------------------------------|---------------------------------|
| 1                                  | 10                              | 20                              |
| 2                                  | 9                               | 18                              |
| 3                                  | 6                               | 14                              |
| 4                                  | 5                               | 12                              |
| 5                                  | 4                               | 8                               |
| 6                                  | 3                               | 6                               |

|                           |   |   |
|---------------------------|---|---|
| 7                         | 2 | 4 |
| 8                         | 1 | 2 |
| Non-compliant contributor | 0 | 0 |

## 5. BID DECLARATION

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

## 6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

6.1 B-BBEE Status Level of Contributor: = ..... (maximum of 10 or 20 points)  
(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

## 7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(***Tick applicable box***)

|     |                          |    |                          |
|-----|--------------------------|----|--------------------------|
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....%

ii) The name of the sub-contractor.....

iii) The B-BBEE status level of the sub-contractor.....

iv) Whether the sub-contractor is an EME or QSE

(***Tick applicable box***)

|     |                          |    |                          |
|-----|--------------------------|----|--------------------------|
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

| Designated Group: An EME or QSE which is at last 51% owned by:    | EME<br>√ | QSE<br>√ |
|---|----------|----------|
| Black people  |          |          |
| Black people who are youth  |          |          |
| Black people who are women  |          |          |
| Black people with disabilities                                    |          |          |
| Black people living in rural or underdeveloped areas or townships |          |          |
| Cooperative owned by black people                                 |          |          |
| Black people who are military veterans                            |          |          |
| <b>OR</b>   |          |          |
| Any EME   |          |          |
| Any QSE   |          |          |

## 8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

### 8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

### 8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....  
 .....

.....  
 .....  
 .....

## 8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
  - ☐ Supplier
  - ☐ Professional service provider
  - ☐ Other service providers, e.g. transporter, etc.
- [TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such

cancellation;

- (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution.

WITNESSES

1. ....

2. ....

.....

SIGNATURE(S) OF BIDDERS(S)

DATE: .....

ADDRESS .....