



REQUEST FOR QUOTATION (RFQ)

Description of Services: *Provision of Project Manager Training (Qualification ID 101869)*

Request date: 17th October 2023

Closing date: 26th October 2023 (No late submissions will be considered)

Closing time: 11:00am

Supporting Documents

The following copies must be attached when returning the RFP:

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. SBD 4: Bidder's Disclosure- No award will be made to the bidder who failed to supply an SBD 4 document completed and signed in full.
 3. SBD 6.1 Preference Points Claim Form in terms of preferential procurement- No award will be made to the bidder who failed to supply an SBD 6.1. document completed and signed in full.
 4. CSD Registration Summary Report.
 5. Tax Compliance Status Pin -No award will be made to the bidder who failed to supply NHFC with a tax compliant proposal.
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Compulsory Requirements

Submission of the following Documents which are to be attached to this request:

- Company accredited with Quality Council for Trades & Occupations (QCTO) to conduct training in Occupational Certificate: Project Manager (Qualification 101869) valid proof of accreditation must be attached. Failure to submit will render your bid non-responsive.
- Detailed CV of Assessor with relevant qualification (constituent assessor for qualification 101869 Occupational Certificate: Project Manager). failure to submit will render your bid non-responsive.
- Detailed CV of moderator with relevant qualification (constituent moderator for qualification 101869 Occupational Certificate: Project Manager). failure to submit will render your bid non-responsive.
- All quotes must be prepared according to the Scope of Work/Key Deliverables
- Price(s) quoted must be valid for at least ninety (90) 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 costs

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.

Rules for bidding

The NHFC reserves the right to reject submitted proposal(s) if it discovers that the bidder (or its directors/members) has any serious adverse reports, whether confirmed by a court or not, such as:

- Being cited as aiding and abetting state capture,
- involvement in fraud and / or corrupt activities;
- misrepresenting audit outcomes of an organisation;
- listed on the National Treasury restricted database;
- being under investigation or facing allegations that may result in criminal charges; or
- Any report as a result of which the NHFC may suffer reputational harm in any way by doing business with the bidder.

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

SCM Enquiries

SCM Official: Anda Mazibuko

Email: quotations04@nhfc.co.za

SPECIFICATIONS

Provision of Project Manager Training (Qualification ID 101869)

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 REQUEST FOR QUOTATION (RFQ)

A service provider has been appointed to assist the NHFC with identifying a Learnership in line with the business of the organisation as well as the maintenance of the Learnership. The Occupational Certificate: Project Manager (Qualification ID 101869) was identified. An application for accreditation is currently underway with QCTO.

3. SCOPE OF WORK

The National Housing Finance Corporation (NHFC) requires an accredited training service provider who will be expected to train learners on the Occupational Certificate: Project Manager (Qualification ID 101869) NQF level 5, including the following processes:

- Learner registration on the Services SETA LMIS;
- Facilitation of training sessions;
- Mentorship during workplace learning;
- Outcomes Based Assessment;
- Internal Moderation;
- Coordination of Services SETA External Moderation;
- Uploading Learner Achievements on Services SETA LMIS;
- Uploading and achieving the learners with the QCTA; and
- Issuing of Statement of Results (SORs) and certificates of competency for the Learnership.

3.1 An outline of the training strategy

- Implementation plan
- Learner attendance management methods, reporting methods to the NHFC and the QCTO.
- Learners exit strategy which shows available opportunities that can be accessed by young people after training. This could be employment opportunities, further education opportunities.

3.2 Term of appointment

The estimated period of the contract will be 12 months from the date of appointment. Performance will be evaluated on a quarterly basis based on the scope of work.

3.3 Delivery location of services:

The services will be delivered at NHFC offices.

3.4 Operations Provisions

Kindly note that most of the NHFC business is operating remotely, therefore service providers should make required provision for virtual meetings and virtual trainings, should the need arise.

3.5 Quantity of Learners to be trained

Six (6) unemployed learners.

3.6 Expected Date of Delivery of Services

Training provider is expected to commence with requirements as indicated in the scope of work in November/December 2023. Training of learners will commence in the month of January 2024.

4. EVALUATION CRITERIA

NHFC promotes the concept of “best value” in the award of contracts, as opposed to merely looking for the cheapest price, which does not necessarily provide the best value.

Best value incorporates the expertise, experience and technical proposal of the organisation and individuals who will be providing the service and the organisational capacity supporting the project team.

4.1 Criterion 1 –Supporting Documentation and minimum criteria.

Bidders will first be evaluated in terms of the gatekeeper/minimum requirements on page1 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.

4.2 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:

4.2.1 Functionality

Table 1

Criteria	Requirements for service providers	Weighting points
	Company Experience	40 points
	Demonstrate recent or similar projects in conducting training in Project Manager (Qualification ID 101869). Minimum of three (3) contactable reference letters to be provided indicating above required services not older than 5 years. Reference letters should be on official letterhead, signed and contact details must be provided.	

	<p>Please note that the NHFC reserves the right to contact the references as part of the due diligence process for RFQs.</p> <ul style="list-style-type: none"> ○ 0 points = 3 to 5 years ○ 10 points = 3 to 5 years ○ 20 points = 5 to 9 years ○ 40 points = 10 years and above <p>The bidders must complete table 2 below.</p>	
	<p>Key Personnel</p> <p>Bidders must submit CV and qualifications of facilitator, on the specific training. Bidders must submit the following sources of evidence:</p>	40 points
	<p>Demonstrate that the facilitator, has the relevant qualification(s) to execute the project by submitting qualifications and CV of facilitator, assessor and moderator.</p> <ul style="list-style-type: none"> ○ 0 points = No qualifications ○ 20 points = Undergraduate qualification ○ 40 points = Postgraduate qualification 	
	<p>Project Approach and Methodology</p> <p>Bidder must submit a comprehensive project plan indicating the readiness to deliver as per the required deliverables indicated in the scope of work.</p>	20 points
	0 points = Methodology not submitted	

	<p>5 points = Poor Methodology</p> <p>Bidder demonstrate no understanding of the project.</p> <ul style="list-style-type: none"> • Terms of reference & brief. • Quality of strategic methodology and approach. <p>10 points = Good Methodology</p> <p>Bidder submitted a comprehensive project plan indicating readiness to deliver as per the required scope of work and deliverables.</p> <ul style="list-style-type: none"> • Understanding of terms of reference & brief • Quality of strategic methodology and approach • Applicability of strategic methodology and approach <p>20 points = Excellent Methodology</p> <p>Bidder to submit comprehensive project plan indicating readiness to deliver as per the required scope of work and deliverables.</p> <ul style="list-style-type: none"> • Understanding of terms of reference & brief • Demonstrated understanding of the NHFC • Quality of strategic methodology and approach • Applicability of strategic methodology and approach 	
TOTAL		100
Minimum threshold		80

Table 2 - Experience of Service Provider

Previous Client	Contact name contact number and email of previous client	Description of training provided	Duration of Training

5. PRICING SCHEDULE

Pricing Instructions

1. The Bidder must price all items according to the scope of work
2. Rates are to include all costs with no unspecified cost to allow for a fair evaluation.
3. Payment will be made based on the deliverables (proven progress) for the services rendered.
4. Payment will only be made on the basis of invoices provided.
5. Offer to be valid for 60 days from the bid closing date.
6. Training is to be provided on site at NHFC premises-Sandton or selected venue around Johannesburg.

Table 3: Pricing Schedule

DESCRIPTION	AMOUNT (EXCL VAT)
Learner registration on the Services SETA LMIS	
Facilitation of training Sessions	
Mentorship during workplace learning	

Outcome Based Assessment	
Coordination of Services SETA External Moderation	
Uploading Learner Achievements on Services SETA LMIS	
Uploading and achieving the learners with the relevant SETA	
Issuing of statement of results (SORs) and certificate of competency for Learnership	
TOTAL CONTRACT AMOUNT (EXCLUDING VAT)	
VAT (15%)	
TOTAL CONTRACT AMOUNT (INCLUDING VAT)	

4.1 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 2020.

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

4.2 Phase 3 - 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 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 work 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 expected 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 quotations04@nhfc.co.za

SBD 4

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 interest¹ 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.

Full Name	Identity Number	Name of State institution

¹ 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 consortium² 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.

² 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.

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 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 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

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

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

a) The applicable preference point system for this tender is the **80/20** preference point system.

b) Either the **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
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PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 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 tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

80/20

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Supporting evidence for meeting preferential procurement targets (bidder to provide the below supporting evidence to claim allocated points for each specific goal)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
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B-BBEE status contributor level. Valid affidavit (as issued by DTI/or CIPC), must be an original or certified copy or a certified copy of SANAS accredited verification certificate	B-BBEE status contributor level. Valid affidavit (as issued by DTI/or CIPC), must be an original or certified copy or a certified copy of SANAS accredited verification certificate		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I 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 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering 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 tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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, if deemed necessary.

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SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

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