



REQUEST FOR QUOTATION (RFQ)

Description of Services: Customer Satisfaction Survey Services

Request date: 15th November 2023

Closing date: 24th November 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:

- 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

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

Customer Satisfaction Survey 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. The 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. The NHFC is also an agency responsible for the disbursement of the First Home Finance on behalf of the Department of Human Settlements.

2. Background of the RFQ

The NHFC is a state-owned entity in the human settlements sector, supporting housing delivery through the provision of affordable housing finance. The organisation operates on a national level, providing wholesale funding and related services and products to the affordable housing market. It is therefore imperative that

a customer satisfaction survey is conducted to harness these factors so that the NHFC can be empowered to provide positive, consistent customer experiences and create true customer loyalty amongst its stakeholders.

3. Purpose

The objective of this bid is to appoint a suitably qualified and experienced service provider to assist with conducting a customer satisfaction survey to four different stakeholder groups:

- To evaluate service delivery satisfaction levels of various stakeholders that have been serviced by the NHFC.
- To improve communication between the NHFC and its various stakeholders.

4. Scope of work/key deliverables

The NHFC seeks to appoint a supplier to assist with conducting a customer satisfaction survey to three different stakeholder groups. Please note scope of work below. The project needs to be concluded within three months of successful company being issued with a purchase order. The survey will comprise telephonic interviews of no more than 10 minutes per respondent. The supplier will draw up the questions in consultation with the NHFC. Each group as detailed below will address different questions. This means that there will be four different surveys.

Group 1 – First Home Finance beneficiaries: 160

Group 2 – First Home Finance applicants: 160

Group 3 – Intermediaries (incl. financial services providers): 20

Group 4 – Municipalities and Human Settlements entities: 41

This is a total therefore of 381 telephonic interviews not exceeding 10 minutes each.

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

- The successful bidder will be required to deliver a detailed written Customer Satisfaction Survey report with concrete recommendations for service improvement
- Material used (e.g. questionnaires) to collect information must be submitted with the final report.
- During the entire project execution phase, the service provider shall submit interim progress reports at each milestone reached.

Specification

The NHFC seeks to appoint a capable and experienced research service provider to conduct a Customer Satisfaction Survey to measure the level of satisfaction of various NHFC stakeholders and end-users with its products and service offerings.

A representative sample drawn from all its categories of stakeholders will comprise a total of 381 interviews using a questionnaire across the nine provinces. Ability and experience to conduct surveys in South African official/indigenous languages and English and Afrikaans is required. The final report will be submitted to the NHFC in English. The service provider must ensure proper project planning, sample sizing, instrument administration, data capturing, data analysis and data interpretation.

Expected Outcome

Through the survey, the appointed service provider will determine the extent to which NHFC's services, products and other interventions have addressed the following:

- Ease of access to the services of the NHFC (incl. call centre, social media, etc.)

- Ease of access to products offered by the NHFC (incl. application processes, etc.)
- Level of satisfaction with engagement or doing business with the NHFC
- The perceived quality and value of service offered by the NHFC.

Copyright and Confidentiality

The products of this project including questionnaires, raw data, and analysed data will be the confidential information and property of the NHFC.

Project Time Frame

The appointed service provider will be expected to deliver within set timeframes (3 months) from the date of appointment. Upon completion of the project, the service provider will be expected to submit a complete written report, insights and recommendations to the NHFC.

4.1 Lockdown Operations Provisions

Kindly note that due to the Lockdown Regulations, National Housing Finance Corporation 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

CRITERIA	SUB-CRITERIA	WEIGHTING / POINTS
Experience of the Team leader	<ul style="list-style-type: none"> • Demonstrate that the team leader has the minimum required experience in conducting surveys and market research/ statistical analysis. <ul style="list-style-type: none"> ○ Less than 3 years = 0 ○ 3 to 5 years = 5 ○ >5 years = 10 ○ >6 years and above = 15 <p><i>This should be supported by the submission of a cv</i></p>	15
Expertise of the Project Team leader	<ul style="list-style-type: none"> • Demonstrate that the team leader has the requisite qualification(s) in any one of the following: Survey 	15

	<p>generation and management/ Statistics/ Data collection/ Data analytics/ Data Science/ Marketing research and analytics/ Business Administration/ Business Analytics/ Research methodology/ Economics/ Monitoring and evaluation/ Marketing management to execute the project by submitting qualifications and CV of project team leader:</p> <ul style="list-style-type: none"> ○ Undergraduate qualification = 0 ○ Honours Degree/ Postgraduate Diploma = 5 ○ Master's Degree or PhD / Doctorate = 15 <p><i>Must attach proof of certified qualifications (Certification date should not be older than six (6) months)</i></p> <p><i>Failure to submit certified certificates will result in Bidder scoring Nil points</i></p>	
Experience of the Company	<ul style="list-style-type: none"> • Demonstrate recent similar projects: relevant track record of undertaking survey/market research 	25

Bidder must demonstrate experience in executing projects of this nature.

work and writing-up & editing reports.

Contactable reference letters and company profile to be provided indicating above required services.

Reference letters should be on official letterhead, signed and contact details must be provided.

Please note that the NHFC reserves the right to contact the references as part of the due diligence process for RFQs.

- **5 points** = 3 to 5 years
- **10 points** = 6 to 8 years
- **20 points** = 9 to 11 years
- **25 points** = 12 years and above

Should be supported by the submission of a company

	<i>profile and Testimony letter / Contactable References</i>	
Methodology and approach	<p>Demonstrate the ability to develop clear research proposal.</p> <ul style="list-style-type: none"> • (Understanding the brief) for NHFC current context = This should include mitigations for possible challenges e.g. covid-19 restrictions = 5 <p>Outline the methodology in relation to:</p> <ul style="list-style-type: none"> ○ Generating the sample (telephonic/face-to-face) = 5 ○ Conducting the survey = 5 ○ Collecting required data = 5 ○ Quality controls = 5 ○ Analysing collected information = 5 	30
Project Plan	An elaborate Project Plan outlining the process, activities,	15

	timeframes, costing, deliverables, approach to conducting the survey, reporting, presenting, delivery of milestones to achieve this project: <ul style="list-style-type: none"> ○ No project implementation plan = 0 ○ Project plan without outlining processes, activities detailed deliverables = 5 ○ Project plan, processes and activities = 10 ○ Project plan, processes, activities and deliverables aligned with timelines = 15 	
TOTAL		100

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 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 on 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.

- 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 quotations04@nhfc.co.

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.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

