



National Empowerment Fund

RFP No: NEF 02/2021/22

**REQUEST FOR PROPOSAL: PROVISION FOR
DEVELOPMENTAL COMMUNICATIONS SPECIALIST
(MOBILISER) FOR THE NEF**

**CLOSING DATE : 02/07/2021
TIME : 14H00**

CONDITIONS AND UNDERTAKINGS BY BIDDERS IN RESPECT OF THIS TENDER

1. **Proprietary Information:**

The National Empowerment Fund (NEF) considers this tender and all related information, either written or verbal, which is provided to the Bidders, to be proprietary to the NEF. It shall be kept confidential by the Bidders and its officers, employees, agents and representatives. The Bidders shall not disclose, publish, or advertise this specification or related information in part or as a whole to any third party without the prior written consent of NEF.

2. **Enquiries**

All communication and attempts to solicit information of any kind relative to this tender should be channeled to names provided below:

Contact person (all questions should be in writing)

Enquiries can be directed to:

Name: Ms. Kedibone Mboweni

Head: Supply Chain Management

Telephone Number Office: +27 11 305 8000

Email address: mbowenik@nefcorp.co.za

Technical Enquiries can be directed to:

Name: Ms. Treasure Mohale

SED and Asset Management Unit

Telephone Number Office: +27 11 305 8000

Email address: mohalet@nefcorp.co.za

3. **Medium of Communication**

All the documentation submitted in response to this tender must be in English.

CONDITIONS AND UNDERTAKINGS BY BIDDERS IN RESPECT OF THIS TENDER

4. Verification of Documents

Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. The NEF will not be liable for any loss which may occur as a result of any pages or information missing or duplicated from or within the submission.

5. Validity Period

Responses to this Request for Proposal received from Bidders will be valid for a period of **150 days**, calculated from the closing date of the tender.

6. Submission of Tenders

- 6.1 A non-compulsory virtual briefing session will be held on 21 June 2021 at 11:00 am. Interested parties are to send company names, email addresses and contact numbers to tenders@nefcorp.co.za by 5pm on Thursday, 17 June 2021 to be able to join the meeting.

N.B In view of the levels of lockdown and to comply with the COVID-19 Regulations, particularly on movement and social distancing, only properly filled and signed tender documents for “**(TENDER NEF 02/2021/22 PROVISION FOR DEVELOPMENTAL COMMUNICATIONS SPECIALIST (MOBILISER) FOR THE NEF)**” in line with the tender requirements must be submitted on PDF format via email to the email address, tenders@nefcorp.co.za no later than 14h00 on **02 July 2021**. No tenders for will be accepted after cut-off time.

- 6.2 No tender received by telegram, telex, facsimile or similar medium will be considered.
- 6.3 Where a tender document is not received at the time of the tender closing, such a tender document will be regarded as a late tender. Late tenders will not be considered.

- 6.4 The tenderer is responsible for all the costs that shall be incurred in relation to the preparation and submission of the tender document.
- 6.5 A list of all references (minimum 3) with contact details must be included in the tender document.
- 6.6 Copies of qualifications, identity documents (IDs) and the curricula vitae (CVs) of persons who will be involved in the execution of this tender should the tenderer be successful must be attached to the proposal.
- 6.7 The following information also needs to be provided with the tender document:
- Names and details of senior management
 - Employment equity details of employees at an operational level
 - Percentage of ownership by number of:
 - Black ownership
 - Black women ownership
 - White women ownership
 - Percentage of ownership by profit share of:
 - Black ownership
 - Black women ownership
 - White women ownership
- 6.8 An original valid Tax Clearance certificate must be included in the tender document. Failure to submit a certificate would render your tender invalid.
- 6.9 Copy/ies of any affiliations that you may have must be attached to the response to this tender.
- 6.10 Kindly note that the NEF is entitled to amend any tender conditions, validity period, specifications, or extend the closing date of tenders before the closing date. All tenderers, to whom the tender documents have been issued, will be advised in writing of such amendments within reasonable time after they are made.
- 6.11 The NEF reserves the right not to accept the lowest tender or any tender in part or in whole.

- 6.12 The NEF reserves the right to award this tender to a black empowered firm.
- 6.13 The NEF also reserves the right to award this tender to any party whom it decides as a whole or in part without furnishing reasons. The NEF reserves the right to withdraw this tender at any stage with or without giving reasons.
- 6.14 The tenderer hereby offers to render all or any of the services described in this tender document to the NEF on the terms and conditions and in accordance with the specifications stipulated in this tender document. This tender document and the tenderer's response thereto shall form part of any service level agreement that may be concluded between the NEF and the tenderer. In the event of conflict between such documents, the service level agreement shall take precedence over all other documents.
- 6.15 Tenders submitted by juristic persons or partnerships must be signed by a person or persons duly authorized thereto by a resolution of a board of such juristic person, a copy of which resolution, duly certified be submitted with the tender.
- 6.16 The tenderer shall prepare for a possible presentation should NEF require such and the tenderer shall be notified thereof no later than 4 (four) days before the actual presentation date.
- 6.17 The tenderer hereby agrees that the offer herein shall remain binding upon him/her and will be open for acceptance by the NEF during the validity period indicated herein.
- 6.18 The tenderer furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her tender response, that the price(s) and rate(s) quoted cover all the work/item(s) specified in the tender response documents and that the price(s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- 6.19 The tenderer hereby accepts full responsibility for the proper execution and fulfillment of all obligations and conditions devolving on him/her under this tender as the principal(s) liable for the due fulfillment of this tender and any contract that might be concluded pursuant hereto.

6.20 The NEF will treat your personal information as confidential and take all necessary steps to protect your information as required by the Protection of Personal Information Act of 2013. The NEF will only process your information (which involves but is not limited to collecting, collating, organising, disseminating and destroying) in the following circumstances:

- where you have granted the necessary consent;
- where we are required to do so by law;
- where processing is necessary to protect our legitimate interests;
- where it is necessary for the conclusion or performance of a contract to which you are party; or
- where it is in the public interest to do so.

6.21 By signing this tender document (RFP), the bidder hereby consents to the use of their personal information which forms part of the tender process and as may be discovered by the NEF and confirm that the information is supplied voluntarily without undue influence from any party. Tenderers acknowledge that they are aware of their right to access the information at a reasonable time for purposes of rectification or object to the processing of the information.

6.22. **Bidders are required to register on the National Treasury Database as per National Treasury Circular No 3 of 2015/2016 – Central Supplier Database (CSD).**

CONDITIONS AND UNDERTAKINGS BY BIDDERS IN RESPECT OF THIS TENDER

Name of your Company (in block letters)	
Signature(s) of the Bidders or assignee(s)	
Name of person signing (in block letters)	
Capacity	
Are you duly authorized to sign this tender?	
Company Registration Number	
VAT Registration Number	
Postal address (in block letters)	
Physical address (in block letters)	
Domicillium citandi et executandi in RSA	(full) street address) (in block letters)
Contact Person	
Telephone Number	
Fax Number	
Cell Number	
E-mail	

***Failure to comply with any of the terms and conditions as set out above will invalidate the tender.**

7. EVALUATION CRITERIA

Phase 1: Technical: Bidders will need to score a minimum of **42 points in technical** in order to qualify for further evaluation (Phase 2 and 3).

Technical	70
<ul style="list-style-type: none"> Understanding of the NEF mandate and business 	05
<ul style="list-style-type: none"> Demonstrate extensive experience, knowledge, implementation mobilization activities and capacity regarding Investor Education programme as part of their normal business on a national level 	20
<ul style="list-style-type: none"> Overall competence (credentials, industry experience, quality of service produced for the other clients, capacity to deliver, availability, track record, references) 	10
<ul style="list-style-type: none"> Ability to execute mobilization activities for the investor education campaign on a national scale 	17
<ul style="list-style-type: none"> Explain the methodologies, which they propose to adopt, demonstrate the compatibility of those methodologies for the scope of work required 	18

Phase 2: Presentation: Bidders will need to score a minimum of **18 points** in order to be evaluated further

Presentation	30 Points
Only shortlisted companies will be invited for presentation	30

Phase 3: 80/20 Preference Point System

All tenders that will achieve the minimum qualifying score for technical will be evaluated further in terms of the preference point system as follows:

CRITERIA	POINTS
Price	80
BEE	20
TOTAL	100 points

SECTION: 2

TERMS OF REFERENCE / SCOPE OF SERVICE

2.1 Preamble

The National Empowerment Fund Act No.105 of 1998 established the National Empowerment Fund Trust (NEF), for the purpose of promoting and facilitating economic equality and transformation, by providing development finance for Black empowered South African businesses and by designing investment products in promoting savings and investment activity amongst Black South Africans. The NEF is an agency of the Department of Trade Industry and Competition (**the Dtic**) and is committed to the implementation of the Broad Based Black Economic Empowerment Act, Act 55 of 2003, and the Codes of Good Practice.

2.2 Scope of the Services

The COVID-19 pandemic has altered the way activities have been completed worldwide. The National Empowerment Fund was not spared from the change that the pandemic brought in delivering services to the public. Thus, the requirement for a service provider that will be able to have flexibility and innovativeness when working with the National Empowerment Fund.

The appointed service provider will be expected to be able to demonstrate expertise in rendering services through the implementation of both virtual and physical seminars. The service provider will not only cater for virtual interventions but face-to-face interventions as well to ensure that proper safety protocols are observed as well as compliance with all regulations of limited numbers for gatherings as set out by government. The service provider will be expected to focus more energies on virtual webinars due to the pandemic and lockdown regulations as per the specifications highlighted in point 2.2.1. Once the lockdown restrictions are eased to enable physical/ face to face interventions, the service provider might be expected to implement a hybrid model which might require the integration of both models (virtual and physical) as stated under point 2.2.1, 2.2.2 and 2.2.3 respectively.

The appointed service provider will be expected to advertise all the seminars prior to the actual event in all available electronic platforms including Facebook, Twitter, YouTube, Instagram as well as print media. Detailed impact assessment reports with attendance registers/webinar subscriptions to be attached for all the seminars **completed**, be it virtual or physical. The reports must be submitted to the NEF by the service provider after every seminar.

Service providers must be fluent or familiar with the 11 South African languages given they will be working with LSM 1 and grass roots in both townships and rural communities.

The service provider may share the NEF Investor Education content in all platforms (virtual, social media and face to face).

2.2.1. Virtual Intervention

- a. Background branding to ensure that the backdrop is the same for different participants who will be joining from different environments.
- b. Placing the logos of the institution on the screen throughout the broadcast.
- c. Titling to be consistent and professional for all participants.
- d. Information bar to enable the NEF to highlight pertinent information and key messages.
- e. Recording for accountability and reporting purposes.
- f. Visual mixing – (switching between speakers, shared screen, audio visual material and PowerPoint).
- g. Issuing the invitation with the zoom link
 - This will allow that as the targeted audiences receive the invitations, they are able to right away secure participation and attendance
 - Such a link should send a confirmation
 - On the day of the event, it should send the attendees a reminder of the webinar
 - Keeping records of those who register and the total subscriptions for reporting purposes

- h. The webinar might be run twice or more per province in all nine (9) provinces per annum:
- Mpumalanga
 - Limpopo
 - Kwazulu-Natal
 - North West
 - Free State
 - Northern Cape
 - Western Cape
 - Eastern Cape
 - Gauteng
- i. The targeted number is a minimum of five hundred (500) attendees per webinar, resulting to nine thousand (9000) attendees per annum and eighteen (18) virtual seminars accomplished.

2.2.2. Social Media Intervention

To maximise the impact, the service provider will be expected to share the Investor Education nuggets on electronic media and social media platforms. The following NEF platforms should be utilised:

- Facebook – National Empowerment Fund
- Twitter – @nefcorp
- YouTube – National Empowerment Fund
- Instagram – @theNEF

Furthermore, the service provider should be able to demonstrate innovation by suggesting other ways and means of implementing the program even by using their own contacts.

2.2.3. Face to Face Intervention

- a. The Service Provider will have to provide specialists services in implementing mobilization activities to achieve the objectives of the Investor Education campaign.

The campaign will be rolled out to five (5) towns within the following nine (9) provinces. In total, forty-five (45) seminars as well as nine (9) industrial theatre programmes which mainly targets academic institutions in the provinces, to be concluded per annum.

- North West
- Limpopo
- Mpumalanga
- Western Cape
- Eastern Cape
- Northern Cape
- Kwa-Zulu Natal
- Free State
- Gauteng

A **detailed, innovative, and concise proposal must be** included in the tenderers' documents addressing, but not limited to the following critical areas:

- Geographic outreach
- A tried and tested mechanism, methodology and tools that will be implemented for the benefit of all targeted potential investors, savers and all South Africans given the scourge of the pandemic especially to the retrenched, unemployed, and ordinary citizens.
- Proven ability and capacity to deliver.
- Ability to converse in indigenous local languages.
- Clear deliverable time frames
- Detailed costing
- A list and profiles of the implementation team
- A detailed list of references on similar work done in the space

- b. The requisite specialist services proposal must demonstrate the following:
- i. Develop a **Mass/Target Mobilisation** implementation plan which should engage a broader geographical sphere, with the intention of creating awareness of the event as well as elaborating and explaining the above the line media campaign. Specific groups are targeted which is determined by various criteria such as geographical location and membership of organisations such as stokvels, business associations and co-operatives.
 - ii. Develop a mobilization plan that demonstrates solid stakeholder engagement through provincial networks to identify and engage the relevant authorities whose support is generally required ensuring that the campaign is a success.
 - iii. Be able to demonstrate strategic approach and methodology to the mobilization plan with regards to the roll-out plan and impact assessment thereof.
 - iv. Knowledge and understanding of basic investment instruments, the financial sector, its products, and services to enable black people to make informed decisions.
 - v. The appointment of the successful service provider(s) will be subject to a contract period of one (1) year with an option of up to one (1) year extension at the NEFs discretion.

In total, fifty-four (54) campaigns comprising of forty-five (45) seminars and nine (9) industrial theatre programs to be completed over a one (1) year period.

- c. Mobilize a minimum of 300 or less attendees per seminar depending on the Corona virus level, status, and permitted numbers to be convened in line with government regulations on the safety protocols around the pandemic.

SECTION: 3

Pricing Schedule

(A separate pricing sheet must be attached)

SECTION: 4

BLACK ECONOMIC EMPOWERMENT

BBBEE Supplier Assessment Form

Trading name of entity _____

Contact person _____

Physical Address _____

Contact telephone number _____

Fax number _____

Cell phone _____

Email address _____

Percentage black shareholding (where applicable) _____

Percentage black women shareholding _____

Percentage white women shareholding _____

Do you fall within a gazetted industry charter? _____

Are you a Qualifying Small Enterprise?
(Annual turnover between R5 million and R35 million) _____

Are you an Exempt Micro Enterprise?
(Annual turnover less than R5 million) _____

Please attach the BBBEE rating / scorecard certificate.

I, the undersigned, certify that the information contained in this document is accurate and correct. I am fully responsible for any misrepresentation in this document and am aware of the repercussions that may arise as a result of such a misrepresentation.

Name: _____ ID Number/Passport Number: _____

Signed: _____ Date: _____

Position: _____

LIST OF TENDER RETURNABLES

- Original valid Tax Clearance Certificate
- Declaration of Interest form
- Declaration of tenderer's past supply chain management practices
- BEE credentials / rating certificate
- Completed and signed tender document
- A copy/ies of any professional bodies that you are affiliated to
- The following information also needs to be provided with the tender document:
 - Names and details of Senior Management.
 - Shareholders Certificate.
 - Details of employees at an Operational Level.
 - Percentage of ownership by:
 1. Black Shareholders
 2. Black Women
 3. White Women

Failure to submit the required documents will result in the proposal being non-compliant and will be disqualified.

Declaration of tenderer's past supply chain management practices

- 1 This tender may be disregarded if the tenderer, or any of its directors have:
- Abused the institutions supply chain management systems;
 - Committed fraud or any other improper conduct in relation to such a system; or
 - Failed to perform on any previous contract
- 2 In order to give effect to the above, the following questionnaire may be completed and submitted with the tender

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).		
4.1.1	If so, furnish particulars		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? To access this Register enter the National Treasury's website, www.treasuy.gov.za . click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 326 5445		
4.2.1	If so, furnish particulars		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?		
4.3.1	If so, furnish particulars		
4.4.	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?		
4.4.1	If so, furnish particulars		

I, THE UNDERSIGNED (FULL NAME) CERITFY
THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN
AGAINST ME SHOULD THIS DECLARTION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state*, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest, where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative:

.....

2.2 Identity Number:

.....

2.3 Position occupied in the Company (director, shareholder etc):

.....

2.4 Company Registration Number:

.....

2.5 Tax Reference Number:

.....

2.6 VAT Registration Number:

.....

* "State" means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;

- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / shareholder/ member:

Name of state institution to which the person is connected:

.....

Position occupied in the state institution:

.....

Any other particulars:

.....

.....

.....

2.8 Did you or your spouse, or any of the company's directors / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

.....

.....

.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.9.1 If so, furnish particulars.

.....

.....

2.10 Are you, or any person connected with the bidder, Aware of any relationship (family, friend, other) between the bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.

.....

.....

2.11 Do you or any of the directors /shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.11.1 If so, furnish particulars:

.....
.....

DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT ALL THE INFORMATION FURNISHED IN THIS TENDER SUBMISSION IS CORRECT.

I ACCEPT THAT THE STATE/NEF MAY ACT AGAINST ME IN TERMS OF THE GENERAL CONDITIONS OF CONTRACT ISSUED BY NATIONAL TREASURY OR ANY APPLICABLE LAW SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder