



***National Empowerment Fund***

**RFP No: NEF 03/2021/22**

**REQUEST FOR PROPOSAL: PROVISION FOR  
SIMULATED ENTREPRENEURIAL TRAINING  
FOR THE NEF**

**CLOSING DATE: 09/08/2021  
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](mailto:mbowenik@nefcorp.co.za)

**Technical Enquiries can be directed to:**

Name: Ms. Mpume Majola

Pre-Investment Manager

Telephone Number Office: +27 11 305 8000

Email address: [majolam@nefcorp.co.za](mailto:majolam@nefcorp.co.za)

## CONDITIONS AND UNDERTAKINGS BY BIDDERS IN RESPECT OF THIS TENDER

### 3. Medium of Communication

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

### 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 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 documents in line with the tender requirements must be submitted on PDF format via email to the email address, [tenders@nefcorp.co.za](mailto:tenders@nefcorp.co.za). No tenders for will be accepted after the cut-off date and time, **09 August 2021 at 14:00**. All proposals must be clearly marked with “**(TENDER NEF 03/2021/22 PROVISION FOR SIMULATED ENTREPRENEURIAL TRAINING FOR THE NEF)**” by no later than **14h00** on **09 August 2021**.

**A non-compulsory briefing session will be held virtually on 29 July at 11h00.**

Interested parties are to send company names, email addresses and contact numbers to [tenders@nefcorp.co.za](mailto:tenders@nefcorp.co.za) by 5pm on Thursday, 27 July 2021 to be able to join the meeting.

- 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 fulfilment of all obligations and conditions devolving on him/her under this tender as the principal(s) liable for the due fulfilment 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).

<b>Technical</b>	<b>70 Points</b>
<ul style="list-style-type: none"> <li>• Demonstrate the ability to provide training nationally face-to-face and on-line (Hybrid model)</li> </ul>	20
<ul style="list-style-type: none"> <li>• Demonstrate how to provide business training to emerging and existing entrepreneurs financial business processes and overall business compliance.</li> </ul>	20
<ul style="list-style-type: none"> <li>• Registered with relevant bodies such as seta, Financial Services Board and certified facilitators</li> </ul>	5
<ul style="list-style-type: none"> <li>• Three or more references relevant to the project (5 points)</li> <li>• Two references (3 points)</li> <li>• One reference (2 points)</li> <li>• None reference (0 points)</li> </ul>	5
<ul style="list-style-type: none"> <li>• Demonstrate ability to facilitate training in all official languages nationally.</li> </ul>	5
<ul style="list-style-type: none"> <li>• Ability to demonstrate pre- and post-training and mentorship outcomes.</li> </ul>	10
<ul style="list-style-type: none"> <li>• Good understand of funding solutions provided by the DFI's</li> </ul>	5

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

<b>Presentation</b>	<b>30 Points</b>
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:

<b>CRITERIA</b>	<b>POINTS</b>
Price	80
BEE	20
<b>TOTAL</b>	<b>100 points</b>



## **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 National Empowerment Funds (NEF) is seeking services of a service provider(s) to provide and manage the following services: capacity building training for emerging and existing entrepreneurs, focusing mainly financial understanding and cash flow management.

The COVID-19 pandemic has altered the normal ways of doing things and brought with it new norms worldwide. The National Empowerment Fund was not spared from these changes that requires innovative ways do deliver quality and efficient services to the public.

It is in this regard that the Pre-investment team deemed it necessary to seek a partnership with a service provider who is flexible, innovative and able to move with the times in order to reach the entrepreneurs nationally.

#### **The required task will generally include but not limited to:**

1. Provide online facilitation services to ensure that the NEF's training is delivered to qualifying entrepreneurs in line with the NEF's mandate. The intention is to also increase the impact of initiatives already implemented by the NEF and other Government Agencies and Departments.

2. Provision of financial skills training, focusing mainly on the previously disadvantaged groups as well as NEF Investee companies especially those with targeted beneficiaries, 70% of these sessions to be undertaken in rural areas.
3. Ability to facilitate the training programme in all African languages and show certification of all the facilitators involved in the project.
4. Ability to train nationally.
5. Develop a training manual for all the modules to be used for training.
6. The total number to be trained and mentored is 3 650 for the duration of the contract (950 year 1, 1 200 year 2 and 1 500 year 3).
7. Show a detailed budget plan for the duration of the contract which will be 3 years including cost per session and per delegate and should be linked with Technical evaluation.
8. Ability to demonstrate pre- and post-training outcomes.
9. Provision of a detailed post training report and further recommended interventions.
10. Proven track record by show of reference letters and registration documents from different relevant legal authorities such as Financial Service Board (FSB) and Seta's.

**The training to focus primarily on the following key areas:**

1. Business acumen;
2. Financial systems and controls;
3. Managing cash flow;
4. Basic financial reporting;
5. Post Mentoring and guidance

**Expected Outcomes and Deliverables**

As indicated above the expected outcomes and deliverables will be:

1. Three-year training plan
2. Detailed mentoring plan
3. Detailed budgets
4. Reports for all trainings performed
5. Attendance register for all the trainees
6. Impact assessment post-graduation

The appointed service provider will be expected to demonstrate expertise in rendering services through the implementation of both physical and virtual seminars and even the hybrid model which integrates both virtual and physical interventions. The service provider will not only cater for face-to-face interventions but virtual interventions as well to ensure that proper Covid-19 safety protocols are observed and complied with. Face to face seminars and the resultant number of people in such sittings will be guided by Government regulations, depending on the various stages of the pandemic and lockdown levels.

The appointed service provider will be expected to advertise all the training seminars prior to the actual event in all available social media platforms (Facebook, Twitter, YouTube etc.)

The appointment of the successful service provider(s) will be subject to a contract period of three (03) years with an option to extend for a further period not exceeding twelve (12) months at the NEF's discretion.

**SECTION: 3**

**Pricing Schedule**

**(A separate pricing sheet must be attached)**

**Provide a breakdown of the total bid price inclusive  
of VAT**

# 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 RETURNABLE**

- Cover Page: (the cover page must clearly indicate the RFP reference number, bid description and the bidder's name)  
Executive Summary (explaining how you understand the requirements of this RFP and the summary of your proposed solution)
  - RFP document (duly completed and signed)
  - Declaration of Interest form (duly completed and signed)
  - Declaration of tenderer's past supply chain management practices (duly completed and signed)
  - Original valid Tax Clearance Certificate or SARS issued tax verification pin code
  - Proof of registration on the National Treasury Central Supplier Database
  - A copy/ies of any professional bodies that you are affiliated to
  - B-BBEE credentials / rating certificate
- Bidders must submit a B-BBEE verification certificate indicating the contribution level of the bidding entity. For Exempted Micro Enterprises (EME) with an annual revenue of less than R10 million and Qualifying Small Enterprises (QSE) with an annual revenue of between R10 million and R50 million per annum, a sworn affidavit confirming the annual total revenue and level of black ownership may be submitted. Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.

**Note:** If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s)

- Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable)
- The following information also needs to be provided with the tender document:
  - Names and details of Senior Management.
  - Details of employees at an Operational Level
  - Shareholders Certificate.
  - Breakdown of shareholders as per the below:
    1. Shareholder's name
    2. Identity Number
    3. Race
    4. Gender
    5. % Shares
- Statement of Financial Position of the Bidder: Latest Audited Financial Statements (where applicable in terms of the Company's Act) and/or independently reviewed financial statements and/or Cashflow Budget for new entities with no financial records.

**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, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> . 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) .....  
CERTIFY 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 DECLARATION 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