



National Empowerment Fund

RFP No: NEF 03/2022/23

**REQUEST FOR PROPOSAL:
PROVISION OF BRAND COMMUNICATIONS**

CLOSING DATE: 10 June 2022

TIME: 14H00

1. Proprietary Information:

The National Empowerment Fund (NEF) considers this Tender and all related information, either written or verbal, which is provided to the respondent, to be proprietary to NEF. It shall be kept confidential by the respondent and its officers, employees, agents and representatives. The respondent 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 channelled to the officials named below:

Contact persons (all questions should be in writing)

Commercial

Kedibone Mboweni

Supply Chain Management

Tel: +27 11 305 8000

Email: mbowenik@nefcorp.co.za

Technical

Moemise Motsepe

Marketing & Communications Manager

011 305 8000

motsepem@nefcorp.co.za

3. Medium of Communication

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

4. Verification of Documents

Tenderers should check the numbers of pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the NEF in regard to anything arising from the fact that pages are missing or duplicated.

5. Validity Period

Responses to this tender received from tenderers will be valid for a period of **150** days counted from the closing date of the tender.

CONDITIONS AND UNDERTAKINGS BY TENDERER IN RESPECT OF THIS TENDER

6. Submission of Tenders

- 6.1. **TENDER RFP NEF 03/2022/23, Provision of Brand Communications Panel** must be emailed to tenders@nefcorp.co.za by no later than 14h00 on 10 June 2022.
- 6.2. All enquiries regarding this RFP should also be directed to the following email addresses, tenders@nefcorp.co.za; motsepem@nefcorp.co.za; mbowenik@nefcorp.co.za and tofilex@nefcorp.co.za. All questions will be responded to bidders within briefing session. A **compulsory virtual briefing session** will be held on 26 May 2022. To join the briefing session, names and email addresses must be submitted to tenders@nefcorp.co.za before 24 May 2022
- 6.3. No tender received by telegram, telex, facsimile or similar medium will be considered.
- 6.4. 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.
- 6.5. The tenderer is responsible for all the costs that shall be incurred in relation to the preparation and submission of the tender document.
- 6.6. A list of all references (minimum 3) with contact details must be included in the tender document.
- 6.7. 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.
- 6.8. 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
 - Youth ownership
- Percentage of ownership by profit share of:
 - Black ownership
 - Black women ownership
 - Youth ownership

6.9. An original valid SARS Tax Compliance Status PIN must be included in the tender document. Failure to submit a certificate would render your tender invalid.

6.10. Copy/ies of any affiliations that you may have must be attached to the response to this tender.

6.11. 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.

6.12. The NEF reserves the right not to accept the lowest tender or any tender in part or in whole.

6.13. The NEF reserves the right to award this tender to a black empowered firm.

6.14. 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.

6.15. 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.

- 6.16. 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.
- 6.17. 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.
- 6.18. 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.
- 6.19. 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.
- 6.20. 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.
- 6.21. 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.

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	
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)	
<i>Domicillium citandi et executandi</i> 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

Tenders shall be evaluated in terms of the following parameters and shall be scored on the weightings stated below. **Phase 1: Technical:** Bidders will need to score a minimum of **70 points in technical** in order to qualify for further evaluation

Technical	100 Points
<ul style="list-style-type: none"> • Understanding of the NEF mandate and business and how it relates to the broader DFI spectrum. 	10
<ul style="list-style-type: none"> • Demonstrate extensive technical knowledge, creative and strategic acumen, experience and implementation track-record of Brand, Marketing and Corporate Communications. Further submit portfolio of work that may demonstrate such competencies. 	55
<ul style="list-style-type: none"> • Ability to execute Brand, Marketing and Corporate Communications outputs for the NEF on a national scale. 	20
<ul style="list-style-type: none"> • Demonstrate ability to execute a campaign for the NEF in any of the preferred areas as follows: <ul style="list-style-type: none"> ▪ Media and public relations, ▪ Creative design, ▪ Media planning and buying, ▪ Audio-visual production, ▪ Website management, and ▪ Event management. • The bidders are required to develop a brief that will allow them to showcase their understanding and knowledge of their field of choice and expertise. 	15

The NEF may conduct site visits with only shortlisted companies.

Phase 2: 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

8. PREAMBLE

The National Empowerment Fund Act No.105 of 1998 established the National Empowerment Trust (NEF), for the purposes of promoting and facilitating economic equality and transformation, by providing development finance for Black Economic Empowerment (BEE) empowered South African businesses. The NEF operates under the umbrella of the Department of Trade and Industry (DTI) and is committed to the Broad-Based Black Economic Empowerment Act 55 of 2003 and the Codes of Good Practice on BEE.

SCOPE OF AGENCY SERVICES

No	Service	Frequency	Included in fee/3 rd party engagement on CE
1	Attend NEF meetings, workshops, information gathering and brainstorming sessions.	On Request	Included in fee
3	Obtain, verify and sign-off NEF brief.	Ongoing	Included in fee
4	Provide advice and guidance on communication strategies.	Ongoing	Included in fee
5	Issue contact reports.	Within 48 hours	Included in fee
6	Attend status meetings.	Weekly/ Project-based	Included in fee
7	Issue status reports for all projects that include but are not limited to project number, description, current status, next steps, timeline and due date.	Weekly/ Project-based	Included in fee
8	Screen and quality check work before presentation to NEF	Per Brief	Included in fee
9	Timeously submit work for approval by NEF.	Per Brief	Included in fee

No	Service	Frequency	Included in fee/3 rd party engagement on CE
10	Submit prepared cost estimates and obtain purchase order numbers for all jobs.	Per Brief	Included in fee
11	Briefing of 3 rd party suppliers to be done post consultation with and approval by NEF	Per brief	Included in fee
12	Provide three quotes for third party work exceeding R10 000 per supplied service.	Per Brief	Included in fee
13	Prepare and submit campaign-timing plans.	Per Brief	Included in fee
14	Obtain sign-off from authorized NEF representatives, primarily the Marketing & Communications Manager.	Ongoing	Included in fee
15	Issue invoices & statements, with PO numbers attached to relevant job descriptions.	Fortnightly/ Monthly	Included in fee
16	Manage and resolve financial queries.	Ongoing	Included in fee
17	Coordinate and jointly project-manage all projects with relevant stakeholders in consultation with NEF.	Ongoing	Included in fee
18	Oversee the application of and adherence to Corporate Identity guidelines in all internal and external communication, designs and collateral.	Ongoing	Included in fee
19	Maintain guard-book and communications message book of all NEF work.	Ongoing	Included in fee
20	Issue Financial reports highlighting projects completed and/or invoiced out-of-pocket expenses, media expenditures and other costs and committed budgets.	Quarterly	Included in fee
21	Issue Financial Reconciliation indicating the difference between third party amounts and actual third-party costs.	Quarterly	Included in fee

No	Service	Frequency	Included in fee/3 rd party engagement on CE
22	Issue a trend analysis report on NEF's brand performance against set objectives (barometer)	Quarterly	Included in fee

Strategic Services:

No	Service	Frequency	Included in fee/3 rd party engagement on CE
23	Gain in-depth knowledge of NEF's operations and brand dynamics.	Ongoing	Included in fee
24	Analyse and report on NEF's market and operating environment.	Quarterly	3 rd party engagement on CE
25	Proactive strategic involvement in providing NEF with relevant insights and communication industry trends.	Ongoing	Included in fee
26	Propose, coordinate and interpret internal and third-party market research.	Ongoing	3 rd party engagement on CE
27	Attend NEF's marketing strategy meetings.	On invitation	Included in fee
28	Develop and review integrated (including ATL, BTL and PR) communication strategies and plans.	Quarterly	Included in fee
29	Develop and review top-line media/channel strategies.	Quarterly	Included in fee
30	Provide strategic direction to creative section through a creative brief.	Per brief	Included in fee
31	Monitor performance and conduct campaign evaluations.	During and after every campaign	Included in fee

Media-buying Services:

No	Service	Frequency	Included in fee/ 3 rd party engagement on CE
32	Analyse market and operating environment from a Media perspective.	Ongoing	Included in fee

No	Service	Frequency	Included in fee/ 3 rd party engagement on CE
33	Joint NEF-agency interaction with media owners, evaluate and advise NEF on suitability of media opportunities.	Ongoing	Included in fee
34	Propose, coordinate and interpret third-party market and media research.	Ongoing	3 rd party engagement on CE
35	Interpret, and provide insights and knowledge on standard agency research, i.e. Adex, AMPS, Telmar, TGI, FutureFact etc	Ongoing	3 rd party engagement on CE
36	Evaluate marketing trends in the media by monitoring all media and provide interpretation, insights and knowledge.	Ongoing	Included in fee
37	Develop and review media strategies and plans and provide detailed information on consumption patterns, black readership / viewership, usership, impact, reach and other variables as may be identified by the NEF.	Ongoing	Included in fee
38	Develop ad-hoc and/or tactical media strategies.	Ongoing	Included in fee
39	Screen media plans and schedules before presentation to NEF (on brief, accurate, etc.).	Per Brief	Included in fee
40	Submit media strategies, plans and schedules for approval by NEF.	Per Brief	Included in fee
41	Media implementation planning and buying.	Per Brief	Included in fee
42	Negotiate, monitor and declare all discounts in consultation with NEF.	Monthly	Included in fee
43	Provision of tear sheets and clips to NEF.	After every placement	Included in fee

No	Service	Frequency	Included in fee/ 3 rd party engagement on CE
44	Conduct campaign evaluations, including TV Post buying analysis.	After every campaign	Included in fee

Creative and Production Services (ATL and BTL):

No	Service	Frequency	Included in fee/ 3 rd party engagement on CE
45	Develop and present creative ideas and concepts (including adaptation).	Per Brief	Included in fee
46	Provide storyboards for TV campaigns.	Per Brief	Included in fee
47	Provide rendering, scamps and layout for print campaigns.	Per Brief	Included in fee
48	Provide scripts for Radio campaigns.	Per Brief	Included in fee
49	Copywriting (English and African languages where relevant).	Per Brief	Included in fee for English only
50	Produce compelling campaigns.	Per Brief	Included in fee
51	Involve the NEF in agreed Production stages (e.g. Pre-Prod, Shoot, etc.).	Ongoing	Included in fee
52	Ensure adequate insurance for the Production process where relevant.	Per Brief	3 rd party engagement on CE
53	Creative DTP.	Per Brief	Included in fee

Media and Public Relations Services:

No	Service	Frequency	Included in fee/ 3 rd party engagement on CE
54	Build and maintain relationships between key media and NEF stakeholders.	Ongoing	Included in fee
55	Develop and maintain relationships with selected list of media and journalists.	Ongoing	Included in fee
56	Assistance with the crafting of media releases and key speeches, media statements and PowerPoint presentations.	Per Brief	Included in fee

No	Service	Frequency	Included in fee/ 3 rd party engagement on CE
57	Organize and facilitate media briefings, tours, functions and interviews,	Per Brief	Included in fee
58	Provide media training to NEF spokespeople.	Ongoing	Included in fee
59	Conceptualize, support and arrange discussions between key stakeholders and NEF	Per Brief	Included in fee
60	Maximise media coverage for the NEF in pursuit of set AVE targets, including proactive interventions and identifying newsworthy opportunities.	Ongoing	Included in fee
61	Monitor targeted media coverage and provide clippings and summary reports that identify opportunities, threats and coverage received.	Ongoing	Included in fee
62	Identify and leverage key industry events.	Ongoing	Included in fee
63	Advise and implement an Investor relation, i.e. relationship building, drafting copy for the annual report, develop content for financial presentations, managing media releases and organizing presentations.	Ongoing	Included in fee
64	Distributing all media releases, by approval from NEF.	Per Brief	Included in fee

Events and Experiential Marketing:

No	Service	Frequency	Required
65	Develop and present creative ideas and event concepts.	Per Brief	3 rd party engagement on CE

No	Service	Frequency	Required
66	Event coordination including venue management, catering, guest list management, management of invites and RSVPs Corporate gifts and Photography).	Per Brief	3 rd party engagement on CE

Publications:

No	Service	Frequency	Required
67	Development of project schedule with clear timelines and critical paths.	Per Brief	Included in fee
68	Document copy-concepts, creative and framework conceptualization.	Per Brief	Included in fee
69	Writing, editing and proofreading.	Per Brief	Included in fee
70	Look and feel of documents, including typesetting, layout and design of selected publications.	Per Brief	Included in fee
71	Document printing and packaging.	Per Brief	Included in fee
72	Document delivery to required destinations.	Per Brief	Included in fee

Exhibitions:

No	Service	Frequency	Required
73	Develop and present creative ideas and Exhibition material, including banners, stand, etc.	Per Brief	3 rd party engagement on CE
74	Production and Delivery of Exhibition material.	Per Brief	3 rd party engagement on CE

Digital and Direct Marketing:

No	Service	Frequency	Required?
75	Visual conceptualisation, development and production of all digital/electronic material for NEF website and intranet	Per Brief	3 rd party engagement on CE

No	Service	Frequency	Required?
76	Provide professional input on the NEF's customer relationship management (CRM) initiatives in relation to the services provided by the NEF's Pre-Investment Business Support unit and all communication pieces used	Per Brief	Included in fee
77	Conceptualisation, production, development, distribution and measurement of direct marketing/mail initiatives	Per Brief	3 rd party engagement on CE

No	Service	Frequency	Required
78	Develop and present creative ideas and communication material to encourage internal brand alignment	Per Brief	Included in fee
79	Provide professional input on team-building, corporate values and staff development activities and source relevant external speakers and service providers for the Motlana Forum	Per Brief	3 rd party engagement on CE

PROGRAMME / CONTRACT PERIOD

The duration of the contract will be for a period of three (03) years.

SECTION: 3

PRICING

Pricing (Attach separate price schedule, stating all pricing information including levels of seniority, hourly rates, costs, fees, etc including and excluding vat)

SECTION: 4

BROAD-BASED BLACK ECONOMIC EMPOWERMENT

B-BBEE Supplier Assessment Form

Trading name of entity

Contact person

Physical Address

Contact telephone number

Fax number

Cell phone

Email address

Percentage black shareholding

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 R10 million
and R50 million)

Are you an Exempt Micro Enterprise?

(Annual turnover less than R10 million)

If you are in possession of a B-BBEE rating or scorecard, please attach the certificate.

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

Name: _____ ID/Passport Number: _____

Signed: _____ Date: _____

Position: _____

LIST OF TENDER RETURNABLES

- Original valid SARS Tax Compliance Status PIN
- Declaration of Interest form
- Declaration of tenderer's past supply chain management practices
- BEE credentials / rating certificate
- Completed and signed tender document
- 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:
 - Black Shareholders
 - Black Women
 - Youth ownership

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)
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 _____

SBD 4

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, 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 an advertised competitive bid, a limited bid, a proposal or written price quotation). 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 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, trustee, shareholder², member):
.....

2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:
..... 2.5

Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹"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 of the national Council of provinces; or
- (e) Parliament.

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

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 / trustee / shareholder/ member:
Name of state institution at which you or the person connected to the bidder is employed :
Position occupied in the state institution:

Any other particulars:
.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:
.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / 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, **YES/NO**
aware of any relationship (family, friend, other) between any
other bidder and any person employed by the state
who may be involved with the evaluation and or adjudication of this
bid?

2.10.1 If so, furnish particulars.
.....
.....
.....

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

2.11.1 If so, furnish particulars:
.....
.....
.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Number / Employee Peral Number

