



**CONTRACT: CM/27-07/2009**

**TERMS OF REFERENCE: EMPLOYEE CULTURAL SURVEY**

**AUGUST 2009**

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## **1. BACKGROUND**

### **1.1. INTRODUCTION**

The National Housing Finance Corporation Limited (NHFC) wishes to appoint advisors to assist in developing a funding plan for the Corporation and with elements of the funding programme.

### **1.2. BACKGROUND INFORMATION**

The NHFC was established in 1996, by the National Department of Housing as a Development Finance Institution (DFI), with the principal mandate of broadening access to affordable housing finance for the low and moderate income South African households.

NHFC has approximately 89 full time employees. NHFC departments include Human Resources, Finance, Information Systems, Legal Services, Communications and Operations (Projects, Commercial and Retail).

The NHFC last completed a comprehensive employee satisfaction survey in 2007 February. The 2007 survey was developed and administered to establish a baseline measure of staff issues in the NHFC. The Corporation would welcome information which provides insight on the effectiveness of interventions put in place to address issues identified in the previous survey.

The National Housing Finance Corporation is therefore requesting proposals from qualified vendors to assist it with developing and conducting a 2009 Employee Satisfaction Survey. The purpose of this RFP process is to secure a contract with the most qualified vendor to assist NHFC staff in the development, implementation, and feedback sessions related to the employee satisfaction survey.

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## **2. SCOPE OF WORK**

### **2.1. PURPOSE OF THE ASSIGNMENT**

The purpose of the assignment is for the service provider to assist NHFC with conducting the 2009/10 Employee Cultural Survey.

### **2.2. ASSIGNMENT OBJECTIVES**

2.2.1. The main objective of the assignment is to conduct a employee cultural survey within the nhfc

2.2.2. To interpret, implementation, and report on survey results.

2.2.3. To assist the nhfc to design and implement strategies to address potential areas of concern;

### **2.3. ASSIGNMENT DELIVERABLES**

The appointed service provider will have to:

2.3.1. Have knowledge of and experience in working with public/private sector in developing employee culture surveys

2.3.2. Must be able to provide the nhfc with a project plan for the survey;

2.3.3. Provide the nhfc with the methodology and implementation plan;

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2.3.4. Report to the executive committee of the nhfc on the results of the survey;

**Key assumptions**

- Skilled in all areas of the implementation and support of the process
- Adequate experience by the tenderer on the above- mentioned programmes.
- Capacity to execute the assignment
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- Describe how the vendor will work with the NHFC to design and implement strategies to address potential areas of concern;

**2.4. APPOINTMENT, COMMENCEMENT AND DURATION OF ASSIGNMENT**

The service provider will be expected to commence on the 1<sup>st</sup> September 2009 and the assignment must be completed by 11<sup>th</sup> September 2009.

**3. PROPOSAL REQUIREMENTS**

**3.1. FORMAT**

Proposals must be submitted in the MS Word Format, Arial 11 and Excel.

**3.2. COPIES**

Three hard copies and an electronic copy must be submitted in a sealed envelope, duly addressed.

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### **3.3. SUBMISSION ADDRESS**

The proposal should be endorsed with the words “RFP CM/27-07/2009MN Cultural Survey” and hand delivered to **NHFC Tender Box, 1<sup>st</sup> Floor, Isle of Houghton, Old Trafford 3, 11 Boundary Road, Houghton, and Johannesburg.**

### **3.4. SUBMISSION DATE**

Proposals must reach the NHFC by 11h00, Friday, 27<sup>th</sup> July 2009.

### **3.5. PROPOSAL COST**

Respondents shall bear all costs incurred in the process of responding to the RFP and in any subsequent negotiation.

## **4. TECHNICAL PROPOSAL**

The Technical Proposal must include the following:

### **4.1. INTRODUCTION**

Outline of the proposal and summary of key aspects of the proposal.

### **4.2. COMPANY PROFILE**

- Appropriate information about the company / consortium;
- Full and comprehensive description of similar work undertaken in the past 3 years;
- List of current clients and references;
- Composition of team; and
- Abridged CV of each member of the (qualifications, experience, expertise etc).

### **4.3. UNDERSTANDING OF REQUIREMENTS**

Explanation of the service provider’s understanding and interpretation of the terms of reference.

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#### 4.4. EXECUTION PLAN

Proposed methodology and approach to be used in keeping with the scope of the work to achieve the purpose and objectives.

#### 5. FINANCIAL PROPOSAL

The Financial Proposal must follow the following framework:

- 5.1. Total price for the project, **inclusive of vat, the person-days and rate for each resource on the team per hour. Only fixed price per deliverable financial proposals will be accepted; and**
- 5.2. Project cost calculation (itemised), **derived from the work content.**
- 5.3. The nhfc undertakes to pay all fully substantiated invoices issued in terms of this appointment as per the agreement. No payment will be made if there is outstanding information.

#### 6. EVALUATION OF PROPOSALS

- I. Tender proposals will be evaluated in accordance with the 80/20 preference point system, as contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).
- II. The points out of 80 will be calculated on the basis of functionality, price and specific goals as shown below.

Category	Criteria	Weighting
1	<ul style="list-style-type: none"> <li>• Have exceptional expertise in Employee Culture Surveys.</li> <li>• Specialise in Employee Cultural /Satisfaction Surveys</li> <li>• To have carried out several similar exercises elsewhere</li> <li>• Have enough capacity to carry out the assignment in terms of the agreed contractual obligations.</li> </ul> <p><b>NB:</b> Proposals should be able to not only provide what is mentioned above but also indicate areas of importance pertinent to the process.</p> <p><b>Key assumptions</b></p> <ul style="list-style-type: none"> <li>• Skilled in all areas of the implementation and support of the process</li> <li>• Adequate experience by the tenderer on the above- mentioned programmes.</li> <li>• Capacity to execute the assignment</li> <li>• Will be able to operate from 1<sup>st</sup> September 2009</li> </ul>	20%
2	<p><b>Approach and Methodology</b></p> <ul style="list-style-type: none"> <li>• Understanding of assignment.</li> <li>• Proposed methodology and approach.</li> <li>• Feasibility and alignment of proposed methodology with required outputs.</li> </ul>	15 %
3	<p><b>Price</b></p> <ul style="list-style-type: none"> <li>• Detailed budget breakdown.</li> <li>• Total Cost.</li> </ul>	30%
4	<p><b>BEE</b></p> <ul style="list-style-type: none"> <li>• Equity Ownership</li> <li>• Management Control</li> <li>• Employment Equity Programme</li> <li>• Skill transfer initiatives</li> <li>• Preferential Procurement</li> <li>• Enterprise Development</li> <li>• Socio Economic Development</li> </ul> <p>BBBEE Criteria-level four (4) of the DTI generic score card shall be a minimum hurdle</p>	20%
	<b>TOTAL</b>	100%

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## **7. COMMERCIAL OBLIGATIONS**

### **7.1. CONTRACTING**

The Contract in respect of the assignment will be signed between the service provider and NHFC.

### **7.2. MATERIAL RIGHTS**

The product of this Funding Plan will be confidential information which will be the property of the NHFC and no disclosure of information to other parties may be made without prior written approval of the NHFC.

## **8. RULES OF BIDDING**

- NHFC reserves the right to amend or cancel this RFP at any time, at its sole discretion;
- Tax Clearance certificates dated within six months of the closing date of this bid must be submitted by those tendering for the business;
- The NHFC is not bound to accept any of the proposals submitted, and reserves the right to call for best and final offers from the short-listed bidders before final selection;
- The NHFC reserves the right to call for interviews with short-listed bidders before final selection;
- The NHFC reserves the right to negotiate price with the preferred bidder;
- An eligible Bidder, if requested, must be prepared to present evidence of experience, ability, service facilities, and financial standing necessary to satisfactorily meet the requirements set forth or implied in this proposal;
- NHFC reserves the right to award a contract in part, to reject any and all quotations in whole or in part, to waive technical defects, irregularities and omissions, at its sole discretion; and
- Late submissions will not be considered.

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## 9. DOCUMENTS TO BE SUBMITTED

- Company profile and proposals
- Original Tax Clearance Certificate
- Copies of any Shareholders agreement
- ID copies of Shareholder/Directors
- A copy of the current memorandum and articles of association of the company or constitutional documents of the company
- BEE Credentials
- Vat registration evidence
- Declaration of interest
- Declaration statement

## 10. CONTACT PERSON

The contact person for information pertaining to the proposal is Mr Ezekiel Radinne, telephone numbers 011-644 9800 fax number 011 – 484 0204 and e-mail [Ezekielr@nhfc.co.za](mailto:Ezekielr@nhfc.co.za). Any request for clarification must be submitted by e-mail to the Project Co-ordinator Cleophus Makola, e-cleophusm@nhfc.co.za.