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# National Housing Finance Corporation SOC Ltd.

Financier |Innovator |Facilitator

**Briefing Session Minutes**

**APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT RESEARCH STUDY TO DETERMINE WAYS OF OPTIMISING HOUSING DELIVERY TO ADDRESS THE AFFORDABLE HOUSING BACKLOG IN SOUTH AFRICA**

**Date:** 31 January 2024

**Time:** 11:00

**Location:** Virtually on MS Teams

NHFC Attendees:

Mr. Khomotjo Kaaka SCM Advisor/ Chairperson

Ms. Khensani Zungu SCM Administrator

Ms. Mandu Mamatela Project Sponsor

Ms. Nomvula Khumalo Project Manager

**Terms of Reference:**

* Background information on NHFC (National Housing Finance Corporation), emphasizing its role as a development finance institution under the Ministry of Human Settlements. NHFC works through intermediaries in the social housing sector and offers products like first home finance. There's a discussion about the persistent affordable housing backlog in South Africa and the need for comprehensive research to determine the scope of the problem. The goal is to understand the backlog and assess if current product offerings are adequate. NHFC is transitioning to become the Human Settlements Development Bank. This transition aims to address housing challenges and catalyze the human settlements ecosystem. The project aims to identify solutions for optimizing housing delivery to address the backlog. It involves defining affordable housing, analyzing factors affecting supply and demand, mapping the backlog, identifying housing typologies, assessing backyard rentals, and proposing solutions. The study will be conducted at provincial levels to understand regional variations. It will involve primary research to gather information from the ground.

**SCM Compliance:**

1. **Submission Deadline and Requirements:**

The submission deadline for bids is emphasized to be on February 20th at 11:00 AM sharp. Bidders are reminded to complete all necessary forms and ensure compliance with administrative requirements. The bid validity period is stated to be 120 days.

1. **Submission Procedure:**

Bidders are instructed to mark their submissions with the correct bid description and ensure they are deposited at the specified address. Late submissions will not be considered. Inquiries regarding the tender are to be directed to a dedicated email address.

1. **Evaluation Criteria:**

The bid evaluation process involves three main phases: administrative compliance, functionality qualification, and price and preference evaluation. Administrative compliance includes legal and industrial requirements, while functionality evaluation focuses on past experience, work plan, methodology, key personnel experience and qualification, and bidder capacity.

1. **Functional Criteria Breakdown:**

For functionality evaluation, various criteria such as past experience, work plan, methodology, and key personnel experience and qualifications are outlined. Points are assigned for each criterion, and bidders are urged to pay attention to details to maximize their scores.

**Questions and Answers**

1. **Scope of Work:**

**Q:** There's a question about whether the research assignment primarily involves collecting primary information directly from relevant officials, departments, or private bodies, or if it includes other methods like secondary research.

**A:** Mandu Mamatela suggests that the approach will involve a combination of engaging with officials and also gathering information from the ground. This suggests a mixed-methods approach, incorporating both primary and possibly secondary research methods.

1. **Sampling Methods:**

**Q:** There's a discussion about sampling methods, including whether to engage in a sample survey or utilize other techniques like triangulation.

**A:** Mandu Mamatela mentions the importance of speaking to a diverse range of people, including those outside of South Africa, to get a comprehensive understanding of the situation on the ground. While there's an acknowledgment of the need for scientifically valid methods, it seems that the emphasis is more on getting a representative sample and understanding the methods used rather than strictly adhering to a specific scientific sampling approach.

1. **Capacity Requirement Clarification**:

**Q:** There's a clarification regarding the requirement for bidders to have a capacity equivalent to at least 20 employees.

**A:** It's explained that this includes both internal employees and outsourced contracted resources. The goal is to ensure that the bidding entity has the necessary capacity to undertake the project, even if resources are sourced externally.

1. **Scope of Work and Relevant Experience:**

**Q:** Questions are raised regarding the reference letters required, particularly in relation to experience in development finance and financial services versus human settlement research.

**A:** The response clarifies that while the focus may be on development finance, relevant experience in similar work, including human settlement research, is considered. The emphasis is on demonstrating relevant research experience in areas similar to the scope of the project. It's mentioned that experience in development finance is considered an added advantage, especially concerning understanding financial products and ensuring they meet the needs on the ground. However, it's acknowledged that subcontracting may be necessary for such a large project.