



## **TERMS OF REFERENCE**

**CONTENT WRITING & EDITING; CREATIVE DESIGN  
AND PRINTING OF THE 2018 INTEGRATED REPORT**

**REFERENCE: MM/02/18**

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## 1. BACKGROUND

The NHFC is a Development Finance Institution, established by the Department of Human Settlements, to make secured housing finance affordable and accessible to the affordable /Gap housing market.

The NHFC achieves its mandate through the facilitation and provision of wholesale financing to various households, dependent upon their affordability, being: rental accommodation; home ownership through mortgage loan finance; and incremental housing. The following funding programmes are offered:

### **Privately –Owned Rental Housing Medium to Long-Term Loans / Private Rentals:**

NHFC provides long-term funding to develop or refurbish affordable privately – owned rental accommodation.

### **Social Housing Rental:**

This is subsidized rental housing made available by social housing institutions which are registered with the Social Housing Regulatory Authority (SHRA).

NHFC provides 30%- 35% project funding as secured debt funding with the balance provided by SHRA and the provinces.

### **Incremental Housing**

NHFC provides funding to non-banking intermediaries who on-lend to home owners for incremental improvements including additional living space.

### **Home Ownership**

NHFC invests in developments where individuals buy completed units through mortgages (with value not exceeding R500 000). Loans are provided to homeowners via NHFC clients who are non-banking retail intermediaries.

### **Strategic Partnerships**

In addition to the above mentioned programmes, NHFC works with investors, developers and housing development agencies and funds to leverage private – sector and development funders to finance and create affordable housing stock.

*(As reference and for further information, kindly link to the NHFC website: [www.nhfc.co.za](http://www.nhfc.co.za) for a view of past Annual Reports)*

## 2. THE BRIEF IN SUMMARY

The NHFC requires services of a company to undertake project management of its integrated report (IR) for the year ending 31 March 2018. The task which is expected to

culminate in an integrated report which meets the Global Reporting Initiatives (GRI) standards should include the following services:

- Copy write, consolidation and editing,
- Obtaining services of a photographer for the Boards, executives and employees; as well as obtaining photographs of successfully funded housing initiatives
- Design, layout and printing of the NHFC 2018 Integrated Report.

### 3. TECHNICAL REQUIREMENTS

#### 3.1.1. Scope of work:

- A quotation for creative design and production of a full colour Integrated Report with the following specifications:
  - 300 A4 printed copies (+/- 170 pages) with UV varnish on the front cover
  - Size: 297x210mm (portrait)
  - Cover: CMYK both sides on Hi-Q Titan Plus (matt) 250gms white
  - Inner: Printed 4 process colours both sides on Hi-Q Titan Plus (matt) 128gsm white
  - Finishing: UV Varnish (Gloss) – on front cover, one side only (four page cover)
  - Folded, gathered, PUR bound and trimmed flush
  - 10CD copies / electronic version
  - Submit a draft design and lay-out for the proposed Integrated Report and
- A production schedule to meet a deadline for work to be completed (printed Integrated Reports) by **15 August 2018**.
- Your company as a possible service provider is expected to demonstrate, through its profile, references and other supporting documents, the following:
  - Expertise in content writing and editing.
  - Experience in the design
  - Production (printing) of Integrated Reports in the financial services sector;
  - Familiarity with content and disclosure requirements for such reports in terms of Corporate Governance, Public Finance Management Act and the Companies Act, placing the service provider in a position to provide strategic advice on content;

### 3.1.2 Project Deliverables

The following are key project deliverables following the appointment of the preferred service provider:

- Draft report (content and design) should be submitted by **31 May 2018**. This refers to the entire integrated report with the exception of the Annual Financial Statements.
- The complete integrated report must be ready for submission by **30 June 2018**.
- The service provider will be expected to **conduct interview** with amongst others the CEO, CFO and Chairperson of the Board who will provide context/background to some of the challenges experienced during the current financial year and future outlook.
- The service provider will be **expected to write/develop and edit content for the 2018** Integrated Report.
- The NHFC will provide information in the form of reports and other documents which will enable the appointed service provider to write the IR content and also validate facts and numbers.
- The costing must take into account that up to three drafts may need to be reviewed, edited before final approval to print.

In addition, the successful service provider will also be evaluated on the following criteria:

- The demonstrated understanding of the NHFC
- The strategic approach to the project; report structure and lay-out
- Experience in developing Integrated Reports
- Strength in copy write, content and ability to edit an Integrated report
- The strength of the creative work
- Value for money
- Professionalism and its ability to deliver printed copies on time and within budget

### 3.2. Competencies and Expertise Required

The service provider must ensure that the appropriate expertise and experience exist in the teams of individuals undertaking the assignment. A brief summary of the experience and expertise of all team members is to be submitted with the quotation.

### 3.3. The Target Audience

<p><b>THROUGH THIS PROJECT, WITH A NATIONAL REACH, THE NHFC SEEKS TO CALL TO ACTION THE FOLLOWING PRIMARY TARGET AUDIENCE TO KNOW ABOUT AND /OR USE ITS PRODUCTS AND SERVICES:</b></p>	
<ul style="list-style-type: none"> <li>• Social Housing Institutions (SHI's)</li> <li>• Private Landlords</li> <li>• Private Developers</li> <li>• End-users (home loan seekers)</li> </ul>	<ul style="list-style-type: none"> <li>• Banks/Retail Finance Intermediaries (RFI's) – urban and rural / Micro-Financiers</li> <li>• National / Provincial / Local Authorities (housing divisions)</li> </ul>
<p><b>THE NHFC STAKEHOLDERS, DIRECTLY AND INDIRECTLY AFFECTED</b></p>	
<ul style="list-style-type: none"> <li>• <b>Government</b> <ul style="list-style-type: none"> <li>- Department of Human Settlements</li> <li>- National Treasury</li> <li>- Parliamentary Portfolio Committee on Human Settlements</li> <li>- Heads of Human Settlements (Provincial)</li> <li>- Local Governments &amp; Provincial Housing Boards</li> </ul> </li> <li>• <b>Regulatory Bodies and Associations</b> <ul style="list-style-type: none"> <li>- Banking Council</li> <li>- National Credit Regulator (NCR)</li> <li>- Social Housing Regulatory Authority</li> </ul> </li> <li>• <b>Trade Unions and Others</b> <ul style="list-style-type: none"> <li>- General Public, Media and Interest Parties (social &amp; political parties)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Investors</b> <ul style="list-style-type: none"> <li>- Banks &amp; other Development Financial Institutions (DBSA, IDC, Umsobomvu Youth Fund, etc.)</li> <li>- Large Employers and Private Sector generally</li> <li>- Donor Organizations</li> </ul> </li> <li>• <b>Partners</b> <ul style="list-style-type: none"> <li>- Public &amp; Private Partners and Funders</li> <li>- NHFC Staff and Board of Directors</li> <li>- Other Housing &amp; Housing Finance Institutions (NURCHA, NHBRC, SHRA, RHLF, etc.)</li> </ul> </li> <li>• <b>Pension/Provident Fund Administrators</b></li> </ul>

### 3.4 Technical Proposal

The Technical Proposal must follow the following framework:

- **Introduction:** Outline of the Proposal is explained and the key aspects of the proposal summarized within a maximum of two pages.
- **Service Provider Overview:** must contain appropriate information about the company / consortium. A client projects list is required, with at least three references and contact details. Referenced annexures must be included to all individuals that would be involved in the selection process.

- **Approach and Methodology:** will show that the prospective service provider understands the pertinent issues as detailed in the first two sections of this Terms of Reference and in the Integrated Report Briefing.

The service provider must support the Approach and Methodology used with experience on similar assignments, stating references of such institutions. This should indicate the prospective service provider's knowledge, experience and interpretation of this assignment. (If any deviation from the Terms of Reference is proposed, that must be indicated and a separate additional Proposal needs to be submitted to clearly illustrate the extent of such deviations).

### 3.5 Financial Proposal

The Financial Proposal **must be submitted separately** and must follow the following framework:

- Total Price for the Project, inclusive of VAT.
- Itemised price per deliverable.
- Project Cost Calculation, derived from the work content and the tariffs
- Proposed Payment Milestones directly linked to Project Deliverables and Project Milestones.

### 3.6 Bid Evaluation Criteria

The proposal will be evaluated in terms of the Preferential Procurement Policy Framework regulations of 2017.

Evaluation of bid responses will be conducted in three (3) phases as follows:

#### **Phase 1: Eligibility/ Pre-qualification criteria**

Bidders will be evaluated according to pre-qualification requirements which include the submission of mandatory information or documentation. Bidders that fail to meet the pre-qualification requirements of the bid will not be considered further for evaluation on technical requirements i.e. Phase 2. Please refer to section 5.3.1 for the eligibility and pre-qualification criteria

Category	Criteria	Weighting
1.	<b>Experience and Expertise of Key Personnel</b>	30

	<ul style="list-style-type: none"> <li>- Organizational track record and external references</li> <li>- General experience in Financial Services/Housing</li> <li>- General experience in local market and target segments</li> <li>- Financial and operational stability</li> <li>- Management structure to account and project team track record</li> <li>-</li> </ul>	
<b>2.</b>	<b>Approach and Methodology</b> <ul style="list-style-type: none"> <li>- Understanding of terms of reference &amp; brief</li> <li>- IR content writing in accordance with relevant IR guidelines. Demonstrated understanding of the NHFC</li> <li>- Applicability and Quality of strategic methodology and approach</li> <li>- Tools and techniques for measurement</li> <li>- Integrated Report structure and lay-out</li> </ul>	45
<b>3.</b>	<b>Strategic Design</b> <ul style="list-style-type: none"> <li>- Quality of creative design</li> <li>- Aesthetic appeal</li> <li>- Approach to creative design</li> </ul>	25
	<b>TOTAL</b>	<b>100</b>

### Phase 2: Technical/ functional evaluation

The minimum qualifying score for functionality is 70% (70 points). All bids that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation on Price and BEE.

### Phase 3: Price and BBEE evaluation

All bids that achieve the minimum qualifying score of 70% (70 points) for Functionality, (acceptable bids) will be evaluated further in terms of the 80/20 preference point system.

Bidders must submit a comprehensive and detailed line-item (VAT-inclusive) budget as well as proposed hours and rates of personnel involved with reference to different levels of proposed resources to be utilised and an estimate of recoverable expenses.



## 4 COMMERCIAL OBLIGATIONS

This section of the document outlines the general commercial process and obligations of the service provider.

### 4.1 Contracting

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

### 4.2 Material Rights

The product of this project will be confidential information, and will be the property of the NHFC and no disclosure of information to other parties will be made without prior written approval of the NHFC

### 4.3 Rules of Bidding

- The NHFC reserves the right to amend or cancel this RFP at any time, at its sole discretion;
- 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;
- The successful bidder (s) may be required to sign a Service Level Agreement (SLA), in terms of which the service provider's performance will be measured and managed.
- Late submissions will not be considered.

## 5 PROPOSAL COMPLIANCE REQUIREMENTS

This section contains the requirements for Proposal Compliance; all submissions must consist of a Technical and a Financial Proposal as explained below:

## 5.1 Procedural Matters

### 5.1.1 Documents to be submitted:

- Technical Proposal
- Financial Proposal (must be submitted separately )
- BBEE Credentials Certified copy of Valid BEE Certificate or Affidavit, if wanting to be scored on B-BBEE
- Original Valid Tax Clearance Certificate. Bids where consortium / joint-ventures / sub-contractors / partners are involved, each party must submit a separate proof of Tax Clearance Certificate / Unique PIN.
- Proof of banking details
- Copy of the current memorandum of incorporation of the company, if a company
- Partnership agreement, if a partnership
- ID copies of Partners / Shareholders / Directors
- VAT registration evidence
- Declaration of interest
- Declaration of Bidders Past Supply Chain Practices
- Central Supplier Database Registration Report
- Signed SBD forms
  
- Financial Proposal (Separate document)
- B-BBEE Credentials (Separate document)

### 5.1.2 Copies

Three hard copies and a soft copy (CD/USB) must be submitted in two sealed envelopes marked:

### 5.1.3 Submission Address

Proposal, endorsed with **RFP: MM/02/18** Appointment of service provider for content writing & editing; creative design and printing of the 2018 integrated report must be hand delivered to:

NHFC Tender Box  
The Isle of Houghton  
Old Trafford 3, 1st Floor

11 Boundary Road  
Houghton  
Johannesburg

Attention Mrs. Pumza Nsukwini

#### **5.1.4 Submission Date**

The Proposal (design and quotation) must reach the NHFC **by Monday 12 March, 2018, at 11am.**

#### **5.1.5 Proposal Cost**

The cost of compiling a Proposal (Design and Quotation) is and remains the prospective service provider's own cost and will not be paid for by NHFC.

#### **5.1.6 Contacts**

The contact person for information pertaining to the RFP proposal is Mrs. Pumza Nsukwini, telephone numbers 011-644 9800 fax number 011 484 0204 and e-mail [pumzan@nhfc.co.za](mailto:pumzan@nhfc.co.za).

**No bid shall be accepted if submitted in any manner other than as prescribed above**