

THE NATIONAL CREDIT REGULATOR

MARCH 2021

**TERMS OF REFERENCE FOR APPOINTMENT OF A
SERVICE PROVIDER TO CONDUCTING
PSYCHOMETRIC ASSESSMENTS FOR THE NCR**

RFP NUMBER: NCR747.03.2021

**DUE DATE: 07 APRIL 2021 AT 11H00 CAT
HAND DELIVERY TO NCR OFFICES**

SECTION 1

GENERAL TERMS OF CONDITIONS

1. General Information for Bidders

The National Credit Regulator (NCR) was established in terms of Section 12 (1) of the National Credit Act (Act 34 of 2005) and came into being on 1 June 2006.

The NCR will determine which bidding organisation (“bid participant”), if any, is appointed in response to this request for submission as stipulated in section 2 of this document.

1.1. General Terms

This tender is issued in terms of the Public Finance Management Act 1 of 1999 (PFMA), the Preferential Procurement Policy Framework Act 5 of 2000 (PPPFA), the Preferential Procurement Regulations, 2017 (PPR), Supply Chain Management Regulations issued by the National Treasury and BBBEE Act.

Parties that wish to submit proposals are required to indicate that they are willing to accept the General Conditions and Procedures of the NCR (see Section 4 below and Annexure B.1). Please read this document carefully prior to submitting your proposal.

1.2. The Proposal Format

1.2.1. Economy of proposal preparation

The proposal should be prepared simply and economically, providing a straightforward and concise description of the bid participant’s ability to meet the requirements of the proposal request.

Clear factual responses are required. The content of the proposals shall determine the merit of each participant, not brochures or other marketing material. To facilitate the review of proposals, participants are required to organise their responses according to the format presented below. Should a participant wish to provide additional information, that information should be referred to, and provided for, in a file of Annexures.

1.2.2. Validity of proposals

The proposals must include a statement as to the period for which the proposal remains valid. The proposal must be valid for at least ninety (90) days from the due date for the submission of all bids. Refer to the quarters in the terms of reference (TOR).

1.2.3. Number of proposals

Each bid participant must provide **three (3) hard copies and 1 CD/Stick** of their entire proposal,

including all the documentation referred to in 4 below, in the format specified in that section. All submitted proposals will become the property of the NCR, and will not be returned. Receipt of all proposals will be recorded in a register at the point of receipt. One copy of the proposal must be signed and dated in black ink by the bidder or authorized representative of the bidder and initialled on each page.

2. Submission of proposals

2.1. Proposals must reach the offices of the NCR before **11:00 on 07 April 2021, @11H00am** and must be enclosed in a sealed envelope which must be clearly labelled/addressed on the outside:

(a) RFP No: NCR 747.03.2021

(b) TERMS OF REFERENCE TO CONDUCTING PSYCHOMETRIC ASSESSMENTS FOR THE NCR

(c) CLOSING DATE: 07 April 2021 AT 11H00 SHARP

2.2. Proposals are to be submitted in the marked tender box, in the reception area, National Credit Regulator, 127-15th Road, Randjiespark, Halfway House, Midrand. The tender box will only be available for the depositing of proposals between 08h00 and 16h30 on weekdays (excluding public holidays).

2.3. Please note that this RFP closes punctually at 11h00 on **07 April 2021**. No late submissions will be considered under any circumstances.

2.4. All the documentation referred to in Section 4 below must be submitted. Failure to submit all the documentation referred to in this section may result in a submission being discarded, and not considered for evaluation.

2.5. If responses are not delivered as stipulated in this Section 2.1, such responses will be considered “late”, and will not be considered for evaluation.

2.6. The NCR shall not disclose any details pertaining to the responses received, to any other participant, as this is regarded as confidential information.

2.7. Envelopes must not contain documents relating to any RFP other than the one referred to in this RFP.

2.8. The responses to the RFP will be opened as soon as is practical after the expiry of the time advertised for receiving them.

2.9. Only the participants that are short-listed after the evaluation process will be informed of the results of the submission adjudication process.

2.10. After the evaluation process is completed, the Evaluation Committee may, prior to making a final selection, draw up a shortlist of participants and require them to make a detailed presentation to the Adjudication Committee. A minimum of 2 days' notice will be given to relevant participants in advance of the presentation date.

3. Timetable

Date	Activity
12/03/2021	Advertisement of the RFP
07/04/2021	Closing date @ 11h00
07/04/2021	Preliminary evaluation
12/04/2021	Evaluations by the Evaluation Committee
22/04/2021	Adjudication Committee meeting
30/04/2021	Appointment

The National Credit Regulator reserves the right to determine the structure of the process, the right to determine the number of short-listed participants, the right to withdraw from the proposal process, and the right to change this timetable at any time without notice.

4. Documentation to be submitted

Please Note

All of the documentation described below must be submitted, with no omissions whatsoever. Where a particular form or format of documentation is stipulated, this is the only form or format in which these documents must be submitted. Failure to adhere to these requirements may result in the rejection of the entire submission.

All of the documentation referred to below (in Parts One – Twelve) must be acknowledged and submitted. For ease of reference and to facilitate the evaluation process, you are requested to clearly mark each part of the submitted documentation as it is referred to below.

4.1. Table of content

Introductory letter by the bidder with authorized contact person and details for this specific tender

4.2. SBD 1 – should be the completed and inserted after the introductory letter

One – Proposal drafted in response to Terms of Reference

Section 2 of this document below, contains the terms of reference (TOR) for the above mentioned

tender. Bid participants are required to draft a proposal that will clearly indicate to the Evaluation Committee how they will fulfil the requirements as set out in the TOR.

Bid participants should include the following information when drafting their proposals:

- Proposals should make clear the relevant skills, experience and capacity of the participant, in respect of this particular TOR. This is an important evaluation criterion. Bid participants should ensure that their proposals focus on how they will address the requirements of this TOR, rather than on achievements.
- Proposals must contain the details of the proposed approach to be adopted in order to deliver the service in accordance with the TOR.
- Proposals should clearly indicate whether or not bid participants have the internal capacity to meet the requirements of the TOR.

4.3. Two – Pricing Proposal- SEPERATE ENVELOPE

SBD 3.1 Pricing Schedule together with signed off detailed pricing on the company's letter head. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected. Additional information may be added on a separate page if necessary.

The total price that the participant will charge to deliver services in accordance with the TOR must be clearly indicated. The pricing proposal should contain sufficient information to allow the Evaluation Committee to estimate the cost of the service, to a high degree of accuracy.

Please note that a financial proposal must be submitted in a separate sealed envelope together with your submission. The financial Proposal will be opened once all technical proposals have been evaluated. This appointment will be made in line with QBS. All prices provided must be inclusive of Value-Added Tax (VAT).

Please note that the prices contained in the pricing proposal are the only charges that may be levied if the participant's proposal is successful, unless explicitly agreed to in writing by the National Credit Regulator, and in terms of the General Conditions of Contract, no additional cost will be accepted after the bidding documents have been submitted and the tender closing date has expired. Any cost for additional parts and peripherals needed for the successful implementation of the project shall remain and form part of the bidding price.

4.4. Three – General Conditions and Procedures of the NCR

Annexure B and B1 - General Conditions and Procedures of the NCR. Bid participants must indicate clearly that they have read this document, and have no objections to being bound by its contents. In cases where any provisions of the General Conditions and Procedures conflict with this

General Information for Bidders and/or Terms of Reference, the latter will take precedence over the General Conditions of Contract.

4.5. Four – Contract Form: Rendering of Services

Annexure C - Contract Form: Rendering of Services. This will only be completed by the successful bidder once a selection has been made by NCR. Participants do not, therefore, need to complete this form at the bidding stage but their proposals must clearly indicate that they have read this form, and have no objections to signing it as is, if selected as the successful participant.

4.6. Five – Tax status

Annexure D - Please attach CSD showing Tax status

A CSD print out must also be attached.

4.7. Six – Preference Points Claim Form

Annexure E – form SBD 6.1. Bid participants must complete Sections 8 and 9 in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected. *## Please note that a **BBEE certificate/ sworn affidavit** must also be attached to the bid documents. None submission will result in zero scoring in this competitive bidding process*

4.8. Seven – Declaration of Interest

Annexure F – form SBD 4. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

4.9. Eight – Declaration of past Supply Chain Management Practices

Annexure G – form SBD 8. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

4.10. Nine – Non-Disclosure Agreement

Annexure H – Non-Disclosure Agreement. Participants must indicate clearly that they have read this agreement, and have no objections to signing it, as is.

4.11. Ten – Certificate of Independent Bid Determination

Annexure I – Certificate of Independent Bid Determination Participants. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

4.12. Eleven – SLA draft version for supplier review

Annexure K – SLA draft version for supplier review. The participants must indicate clearly that they have read this agreement, and have no objections to signing it, as is. If not objections should be outlined separately in a letter. NB: all the SBD documents can be downloaded from our website - <https://www.ncr.org.za/tenders-download/current-tenders>

5. Evaluation Criteria

Proposals will be evaluated on the 80/20 preference points scoring system: that is, 80% of the points awarded will be based on price, as indicated in the table below; and 20% of the points awarded will be based on B-BBEE codes system, allocated as indicated in the table below:

B-BBEE status level of contributor	Number of points	Price
Total maximum points	20	80

Functionality will be evaluated in terms of Section 2 point 10

6. Conflict of interest

Service providers are required to provide services that are professional, objective and impartial. Service providers must ensure that there is no conflict of interest between existing assignments, obligations and responsibilities to other clients and the services set out in the TOR. In the event of any uncertainty in this regard, full disclosure in the submitted proposal should be considered. Non-disclosure of a conflict of interest may be grounds for termination of any contract.

7. Confidentiality agreement

The successful service provider may have access to confidential data or information. The appointment of a successful bidder is subject to that bidder agreeing to the contents of, and signing, the NCR's standard Non-Disclosure Agreement.

8. Contact details

This no-contact policy does not apply to any information deemed to be in the public domain, or which is readily available from organs of State, which are repositories of such information. All communications and enquiries/requests for clarification relating to this proposal should be directed to procurement@ncr.org.za.

SECTION 2

TERMS OF REFERENCE FOR CONDUCTING PSYCHOMETRIC ASSESSMENTS FOR THE NCR

1. Background

The National Credit Regulator is the regulatory authority established on 01 June 2006 in terms of the National Credit Act, 2005 with the mandate to promote and advance the social and economic welfare of South Africans, promote a fair, transparent, competitive, sustainable, responsible, efficient, effective and accessible credit market and industry, and to protect consumers.

Human Resources is looking into appointing the services of a supplier for conducting competency based assessment to aid the recruitment process.

2. Purpose

- 2.1.** To conduct competency based assessments for the purpose of selection to reduce the risk of making incorrect appointments.
- 2.2.** To conduct competency based assessments for the purpose of development in order to ascertain an individual's strengths and areas for development.

3. Scope of work

- 3.1.** Conducting psychometric assessments to aid the selection process, which is suitable and reliable for the use within South African Context;
- 3.2.** Provide written recommendations to the NCR Human Resources Manager;
- 3.3.** Provide feedback to candidates, if required;
- 3.4.** The successful bidder must be able to conduct assessments throughout South Africa at their own premises.

4. Evaluation Criteria

The functionality criteria will be evaluated based on the following:

Evaluation Criterion	Weight
<p>Tools and methods used for psychometric assessments of Paterson level C and Paterson level D and E positions for selection purposes.</p> <ul style="list-style-type: none"> - Range of assessment batteries to be used for selection purposes (Paterson level C, Paterson level D and E positions). - Integration of assessment results to provide a recommendation. <p>5= Personality test, ability test(s) and emotional intelligence test used with recommendation report. All valid and reliable within the SA context. Assessments applicable to Paterson band. 4= Personality test and ability test(s) used with recommendation report. All valid and reliable within the SA context. Assessments applicable to Paterson band. 3= Various assessments without linking to Paterson band. 2= No integration of assessment batteries. 1= Assessments not applicable to broad South African demographics.</p>	60%
<p>The bidder is required to be within 30 kilometres from the NCR offices in order to make it accessible for candidates to attend to the assessment appointment</p> <p>5 = less than 30km from NCR 4= 30km from NCR 3= more than 30km from NCR 2= more than 40km from NCR 1 = more than 50km from NCR</p>	10%
<p>Bidders are required to outline step by step approach with regards to the process, including timelines. Indicate how</p>	10%

Evaluation Criterion	Weight
<p>confidentiality will be handled.</p> <p>5= Detailed approach (step by step) indicating reason for each step and timeline (completed within 5 working days for each position)</p> <p>4= Detailed approach (step by step) indicating reason for each step (completed within 8 working days for each position)</p> <p>3= Approach indicated with sufficient detail (completed within 10 working days for each position)</p> <p>2= Vague approach indicated</p> <p>1= No approach indicated</p>	
<p>Qualifications of consultants conducting psychometric assessments as well as relevant up to date registrations with the HPCSA.</p> <ul style="list-style-type: none"> - A minimum of five (5) years relevant experience and proof of relevant qualification. - Health Professions Council of South Africa (HPCSA) membership must be valid and in the names of the assigned consultant. <p>5= Relevant qualification and more than 5 years' experience</p> <p>4= Relevant qualification and 5 years' experience</p> <p>3= Relevant qualification and 4 to 5 years' experience</p> <p>2= 3 to 4 years' experience</p> <p>1= 1 to 2 years' experience</p>	10%
<p>Track record in providing similar services to organisations with similar demographics to the NCR in the past 3 years. At least 3 written references where similar work has been done in the past three years.</p> <p>5= more than 3 written reference letter with contact details</p> <p>4= 3 written reference letters with contact details</p> <p>3= less than 3 letters with contact details</p> <p>2= less than 3 letters without contact details</p> <p>1= one written reference</p>	10%

Bidders are required to score a minimum of 70% points on functionality to qualify to be evaluated in the next level (BBEE and price). Bidders who do not score the minimum of 70% points on functionality will be disqualified and not be evaluated on price and BBEE.

ANNEXURE A

Pricing Schedule

Description	Pricing Year 2021-2022 inclusive of VAT	Pricing Year 2022-2023 Inclusive of VAT	Pricing Year 2023-2024 Inclusive of VAT
Cost per candidate for full range of recommended psychometric assessments, including recommendation report and feedback for Paterson Level C positions			
Cost per candidate for full range of recommended psychometric assessments, including recommendation report and feedback for Paterson Level D positions (supervisory/managerial)			
Cost per candidate for full range of recommended psychometric assessments, including recommendation report and feedback for Paterson Level E positions (EXCO)			
Any other costs			

Additional information:

- Brief company profile, as relevant to the above mentioned terms of reference.
- Experience in the relevant areas.
- Clientele.
- The proposal should contain a work plan, showing tasks, timelines etc.
- Certified BBBEE certificate
- Financial proposal.
 - Detailed pricing on the company letter head, the total cost must link to SBD 3.1 attached.

**** Bidders will need a minimum of 70 points to be qualified for price and BBBEE.**

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