

**THE NATIONAL CREDIT REGULATOR**

**MARCH 2020**

**TERMS OF REFERENCE FOR REVIEW AND UPDATE THE NCR’S EDUCATION AND COMMUNICATION POLICIES**

**RFQ NUMBER: NCR682.03.2020**

**DUE DATE: 24 APRIL 2020 @ 16:00 via e-mail**

[**tmakoloko@ncr.org.za**](mailto:tmakoloko@ncr.org.za) **or hand delivery at the NCR offices**

**TERMS OF REFERENCE**

**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO REVIEW AND UPDATE THE NCR’S EDUCATION AND COMMUNICATION POLICIES**

# BACKGROUND

The National Credit Regulator (NCR) was established as the regulator under the National Credit Act No. 34 of 2005 (NCA) and is responsible for the regulation of the South African credit industry and market. Furthermore, the NCR is responsible for increasing knowledge of the nature and dynamics of the consumer credit market and industry and to promote public awareness of consumer credit matters. Through its Education and Communication department, the NCR carries out various educational and communication programmes guided by various related internal policies and procedures.

These policies have been in existence, however the NCR would like to conduct a comprehensive review of its internal policies and introduction of new policies aligned to the latest frameworks, legislation and industry best practices in order to remain relevant and enhance how we communicate and educate the credit industry participants and the public at large.

Below are the current NCR Education and Communication Policies:

* Communication Policy (24 pages);
* Website Content Management Policy (18 pages);
* Media Relations Policy (5 pages);
* Funding Policy for Education and Capacity Building Workshops (3 pages);
* Workshop Policy (4 pages);
* Crisis Communication Policy (included in the Communication policy);
* Corporate Identity Policy (5 pages);
* Publications Policy (3 pages); and
* Social Media Policy (4 pages).

The above number of pages exclude the title and table of content pages.

1. **TERMS OF REFERENCE**

# In light of the above, the NCR seeks to appoint an external service provider to review and/or develop current and/or new policies relating to the NCR’s educational and communication mandate. These policies should amongst other things be aligned to the latest frameworks, legislation and industry best practices.

1. **OUTPUT REQUIRED**

* Review of all existing NCR policies and development of relevant policies where necessary;
* The revised and new policies should be drafted and aligned to the Policy of Polices, which is an overarching policy for the NCR;
* A workshop with the NCR project team on the draft policies for comments;
* Incorporation of comments and revision of the policy where necessary;
* Presentation of the final drafted policies to the NCR’s Executive Committee(EXCO);
* Incorporation of further input by EXCO where necessary;
* Presentation of final drafted policies; and
* Delivery of the soft copies of the revised and developed policies;
* The review process to be finalised by **30 April 2020**.

1. **FUNCTIONALITY EVALUATION**

Proposals will be evaluated on a scale of 1-5 in accordance with the criteria below:

**1=Poor 2= did not meet the requirements 3=partially met the requirements 4= meet the requirements 5= Exceed the requirements**

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| --- | --- | --- |
| **Description** | **Weight Outline** | **Weights** |
| **Understanding of the work required**   * Is the bidder in the industry relevant to the NCR’s requirements (i.e. writing of policies)? * Does the bidder have relevant experience in providing similar service? (i.e. track record with relevant experience) | 1= 1 year and less  2= 1-2 years  3= 3-4 years  4=5 years  5=6 years and above | 10 |
| **Experience and skills**  Proposals should make clear the relevant **skills, and experience** of the proposed team, in respect of this particular TOR   * The relevant skills and the entire proposed project team (Brief CV’s of the proposed team members indicating amongst others their qualifications, and experience must be provided). * Project leader- highlight experience in policy review; and * Project team members to at least have the relevant qualifications amongst others policy/documents writing with design and layout. | 1= 1 year and less  2= 1-2 years  3= 3-4 years  4=5 years  5=6 years and above | 30 |
| **Design and Layout**   * Bidder is required to submit a draft design and the layout of the policies; * Bidder must indicate the proposed layout and design with version controls; and * Provide a soft copy of all the policies to be uploaded online. | 20 | 20 |
| **Project Execution Plan or Framework**  Proposals must contain the details of the **proposed approach** to be adopted in order to deliver the service in accordance with the TOR. Bidders must provide:   * Project Execution Plan or Framework * An indication of ability to meet tight deadlines and work schedules as well as capacity to deliver; * Outline high level review process to be conducted. | 30 | 30 |
| **References**   * Contact details of 3 references from amongst recent clients with whom similar work has been conducted in the past 36 months. * The bidder must provide 3 reference letters from previous clients where similar work has been conducted, indicating the contact details of the client. | 10 | 10 |
| **Total Score** | | **100** |

1. **Conditions of the bid**

The appointed professional service provider is duly bound to observe confidentiality requirements and compliance with all relevant laws and regulations of South Africa.

1. **Submission of proposals**

Proposals must reach the offices of the NCR before **24 April 2020**, and must be enclosed in a sealed envelope which must have clearly inscribed on the outside:

1. **TERMS OF REFERENCE FOR DEBT COUNSELLING TRAINING.**
2. **METHOD OF SUBMISSION: HAND DELIVERY TO NCR OFFICES AT RECEPTION OR E-MAIL:** [**tmakoloko@ncr.org.za**](mailto:tmakoloko@ncr.org.za)
3. **CLOSING DATE: 24 April 2020 Time: 16:00**

Proposals are to be submitted through e-mail: **tmakoloko@ncr.org.za**, or in the reception area, Please note that this RFQ closes punctually at **16:00**. No late submissions will be considered under any circumstances. Failure to submit all the documentation referred to in this section may result in a submission being discarded, and not considered for evaluation.

1. **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, **20%** of the points awarded will be based on B-BBEE codes system.