



## **TERMS OF REFERENCE**

**CIPC BID NUMBER: 21/2017/2018**

**DESCRIPTION:**                    **INVITATION TO CERTIFIED RESEARCH SERVICE PROVIDERS TO CONDUCT THE CIPC ANNUAL CUSTOMER AND STAKEHOLDER SATISFACTION INDEX AND PREPARE A SURVEY REPORT WITH RECOMMENDATIONS FOR IMPROVEMENTS AND IMPLEMENTATION BY CERTIFIED RESEARCH SERVICE PROVIDERS**

**CONTRACT PERIOD:**                    **NOT EXCEEDING THREE (3) MONTHS.**

## 1. Purpose

The purpose of this Request for Proposal (RFP) is to outline the terms of reference (TOR) for the invitation of suitably qualified, certified, professional and competent research practitioners to submit a detailed proposal for the following services:

- To conduct Brand, Customer and Stakeholder Satisfaction Surveys; and produce a report accordingly

## 2. Introduction and background:

During the previous financial year CIPC contracted a service provider to conduct a stakeholder and customer segmentation and satisfaction baseline survey, to produce reports and recommend a framework for improvement and implementation.

The stakeholder and customer segmentation phase one (1) workshop was aimed at segmenting CIPC stakeholders and customers using qualitative methods. This also outlined methods of interaction and how these are perceived by CIPC internal stakeholders.

Phase two (2) involved conducting a baseline customer and stakeholder satisfaction survey using quantitative methods.

The primary purpose of effective Reputation and Brand Management, including stakeholder management is to support an organization in achieving its strategic objectives by interpreting and influencing both the external and internal environments and by creating positive relationships with stakeholders and customers through the appropriate management of their expectations and agreed objectives. One of the three (3) CIPC's Outcome oriented goals is to promote broader formal economic participation by enhancing service delivery and extending the reach of the CIPC. A key objective under this goal is to improve the reputation and organizational performance of CIPC.

With the development of customer interaction methods such as the revamped CIPC Website, Introduction of Unstructured Supplementary Service Data (USSD) codes and upgraded call Centre, CIPC still has to find out whether these yield positive and effective results from customer point of view.

## 3. Scope

The scope of this Terms of Reference entails the following key elements:

### 3.1 Stakeholders, Customers and mediums of communication

An initial list of stakeholders (not exhaustive), in no particular order of importance or significance is set out below.

- The Minister of Trade and Industry and Members of the Portfolio Committee of Trade and Industry
- The dti and Council Of Trade and Industry institutions (COTII) forum
- Government cluster partners (Department of Justice and Constitutional Development; Department of Home Affairs, Department of Statistics, National Treasury, The Department of Justice (Master of the High Court and the High Court itself), The Department of Land Affairs – The deeds office, etc.)
- Regulators and similar other institutions: SARS, Johannesburg Stock Exchange (JSE), FSB, FIC, Higher education institutes (universities, universities of technology, colleges), ICT, National Credit Regulator (NCR), Competition Commission, National Consumer Commissioner, Provincial Departments of Economic Affairs
- National Economic Development and Labour Council (NEDLAC), Business Unity of South Africa (BUSA)
- Banking Association of South Africa (BASA) and banks
- Chamber of Commerce
- CLC – SAICA, SAIPA, Law Societies.(customers or stakeholders depending on nature of engagement)

Currently CIPC reaches its customers through the following channels:

- Website and transactional website
- Customer Notices
- Call centre
- Collaboration partners
- Self Service Terminals
- Service Centres
- USSD services
- Social Media (Facebook and Twitter)

### 3.2 Stakeholder and Customer Baseline Satisfaction Survey:

- Review the phase two (2) questionnaire and improve/ update it where necessary (minimize the questions) and incorporate stakeholder and customer needs, concerns, perceptions of CIPC, its brand and reputation, channels of communication, etc.
- Develop the Questionnaire/s in consultation with CIPC.
- Allow for at least 5 open ended /recorded questions in the survey.
- Conduct 30 key stakeholder face to face interviews
- Conduct 50 stakeholder telephonic interviews
- Conduct 1000 customer/ channel interviews using either electronic, telephonic, face to face or other type of interview methodology that best suit each customer/channel.
  - Website
  - Customer Notices
  - Call centre
  - Collaboration partners
  - Self Service Terminals
  - Service Centres
  - USSD
  - Social Media (Facebook and Twitter)
- Present analysis results and report accordingly; and
- Make recommendations

### 3.3 Research Methodology & Sample

The Customer Expectations Loyalty Model was used during the baseline survey for stakeholder and customer satisfaction. Bidders must conduct a brand and customer and stakeholder satisfaction survey with CIPC's customers and stakeholders, using quantitative methods. Specifically, the appointed service provider must use three platforms to conduct the survey, namely:

- Computer Assisted Telephonic Interviews (CATI) with CIPC customers,
- Computer Assisted Personal Interviews (CAPI) with CIPC stakeholders; and
- Online Self-Completion Questionnaires with both customers and stakeholders.

The research universe for this study will comprise of all CIPC's stakeholders and customers. CIPC will supply the appointed service provider with a list of these customers and stakeholders. A total of 50 Stakeholder interviews should be conducted (using the CAPI and Online methodology) and 1000 Customer interviews should be conducted (using the CATI and Online methodology). The total achieved sample should be 1000 interviews.

**The methodology and approach should be similar to the one used for the base line survey.**

Satisfaction with the CIPC should be measured across seven key attribute dimensions:

- Image & Reputation
- Leadership & Vision
- Systems & Processes
- Mediums of Communication
- Communication
- Service Excellence
- Brand
- Products/services

Satisfaction ratings should be done on a ten (10) point scale, where 1 means extremely dissatisfied and 10 means extremely satisfied. The CIPC received an overall satisfaction rating of 6.95 out of 10 during the 2015/16 which was improvement from the baseline survey that achieved an overall satisfaction of 6.30 out of 10. Overall, stakeholders were less satisfied with the CIPC (4.70) compared to customers mean score of (6.38). Service Excellence and Communication received the lowest satisfaction ratings among both customers and stakeholders during the baseline survey. The research methodology should also include Correlation, Regression and Impact Grid Analysis for CIPC.

#### **4. Pricing Schedule:**

- The service provider must provide costing based on the pricing schedule table below.
- Service providers must endeavor to structure their pricing in terms of milestone payments.
- These milestones must be structured in such a way that the deliverables are achievable and measurable. These milestones will be used as payment milestones once the deliverables have been signed off by the responsible project sponsor or owner. It will be in the bidder's best interest to structure the payment milestones in such a way that regular payments can be achieved.
- The services provider should provide a clear project plan, with very clear activities, time frames, relevant deliverables and costing.
- **Note: Service providers will be responsible for all costs; e.g. design and production of survey materials, third party payments, transportation and other disbursements for ALL activities/ meetings associated with this quote and must include this cost in the pricing for this quote.**
- **NB: The pricing schedule table below must be printed and placed in a separate closed envelop together with the SBD 3 form for Price**
- **SBD 1 to be included in the price envelop**  
The price envelop must consist of the following documents
  - i. **SBD 3 FORM**
  - ii. **SBD 1 FORM**
  - iii. **PRICING SCHEDULE (TABLE BELOW)**

**ALL THE ABOVE MENTIONED MUST BE PRINTED AND PLACED IN A SEPARATE ENVELOP MARKED WITH THE BIDDER'S NAME**

Submissions not set out in the prescribed format will not be considered.

Item	Description of element	Quantity / Estimated hours	Price (excl VAT)	Price (Incl VAT)
1	All costs involved in conducting survey including travel, meetings, planning, testing, questionnaires, etc. )			
2	Survey methodology presented, discussed and approved and questionnaire and approach reviewed and approved by CIPC			
3	Survey conducted and analyses. Preliminary Report presented to CIPC			
4	Final Report approved by CIPC			
	<b>TOTAL</b>			

**5. Service provider appointment – service level agreement:**

The successful service provider will be required to enter into a Service Level Agreement (SLA) with CIPC within ten (10) working days after receiving official confirmation of being awarded the tender or contract.

**6. Validity of Proposals:**

The prospective service provider (Bidder) is required to confirm that it will hold its proposal valid for 90 days from the closing date of submission of proposals, during which time it will maintain without change, the personnel proposed for the services together with their proposed rates.

**10. Copyright**

Copyright in all documentation, electronic data/programme source codes, manuals and documentation produced or prepared for the CIPC (any training material included) by or on behalf of the Contractor or emanating from this Contract shall vest in the CIPC which shall have the right to adopt them for other projects. Any base systems, programme source codes, technical manuals or adaptations developed by the Contractor or its supplier prior to this contract will be excluded. The contractor shall not, without the written consent of the CIPC, granted by a duly authorised official, use, copy or communicate to any person such documents or information, except as strictly necessary for the purposes of the Contract. In addition and without limiting the foregoing, the Contractor shall deliver such documentation to the CIPC, immediately upon the expiry or termination of the Contract.

**11. Special Conditions:**

- The service provider must ensure that their work is confined to the scope as defined and agreed.
- Government Procurement General Conditions of contract (GCC) as issued by National Treasury will be applicable in all instances. The general conditions is available on the National Treasury website ([www.treasury.gov.za](http://www.treasury.gov.za))
- No advance payment will be made. Payment will be made in terms of the deliverables. CIPC will pay within the prescribed period according to PFMA.

- The price quoted for the services must include Value Added Tax (VAT).
- All prices must be valid for 90 days.
- The successful contractor must at all times comply with CIPC's policies and procedures as well as maintain a high level of confidentiality of information.
- All information, documents, programmes and reports must be regarded as confidential and may not be made available to any unauthorised person or institution without the written consent of the Commissioner or her delegate.

**12. Contractual Period:**

The contract will be valid for a period **not exceeding Three (3) months.**

**13. EVALUATION PROCESS**

Bids will be evaluated in accordance with the **80/20** preference point system contemplated in the Preferential Procurement Policy

**Evaluation Process (Phases)**

- a) Bids will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

**The evaluation will be completed in 3 phases:**

- 1. Phase 1: Compliance to minimum requirements**
- 2. Phase 2: Functional evaluation**
- 3. Phase 3: Pricing and Preferential Procurement policy**

**Phase 1: Compliance to minimum requirements**

**During Phase 1**

All bidders will be evaluated to ensure compliance to minimum document requirements (ex. Tax Clearance Certificates), ensuring all documents have been completed and that the specified documentation has been submitted in accordance to the bid requirements. All bidders that comply with the minimum requirements will advance to Phase 2.

**Responsiveness Criteria: Failure to provide the following might result in a bid not to be considered: (minimum requirements)**

- Bid offers must be properly received on the tender closing date and time specified on the invitation, fully completed and signed in ink as per Standard Conditions of Tender.
- Submission and completion of the Declaration of Interest
- Submission of an original and valid Tax Clearance Certificate
- Submission of the company's registration certificate from the Register of Companies (CIPC).
- Submission of proof of registration with the National Central Supplier Database

## Phase 2: Functional evaluation

All bidders that advance to Phase 2 will be evaluated by a panel to determine compliance to the functional requirements of the bid. The functional evaluation will be rated out of 100 points and will be determined as follows:

**Note:** Functionality will count out of 100 points. Interested parties must achieve a minimum score of 60 out of 100 on the functionality evaluation to proceed to the next phase. Bidders that achieve less than 60% on functionality will be disqualified for further evaluation.

Only service providers that demonstrate the above and receive sound references will be considered for price evaluation.

### 13. Evaluation Criteria:

Only service providers scoring higher than 60% will be considered during phase two (2). The functional evaluation will be rated out of 100 points and will be determined as follows:

EVALUATION CRITERIA	Rating					Weight	Total
	1	2	3	4	5		
Demonstrated expertise with stakeholder and customer Surveys, Examples of surveys demonstrating the scope and level of complexity, Bidders must provide three (3) contactable references and testimonial letters for similar work done ✓ Testimonial to include email addresses ✓ Testimonial to include telephone numbers ✓ Testimonial to include contact person <b>CIPC MAY verify reference provided by bidders</b>						20	
Demonstrated resources and capacity to conduct credible research and strategy recommendations: ○ Provide CVs of the people who will be working on the project, clearly setting out their respective roles ○ Provide certified copies of accreditations and certified copies of accredited researchers. ○ Submit an abridged company profile outlining qualified resource availability ○ Proof of Liquidity ○ Numbers of years of experience (less than 1 year, 1-3 year, 4-6 years, 7-9 years, 10 or more years)						30	
The quality of the overall proposal: Clearly demonstrating the approach and methodology to be applied in carrying out the assignment. The proposal should include: ✓ Proposal on principles, methodology, and plan aligned to the baseline methodology. ✓ Demonstrated understanding of CIPC requirement and environment ✓ Clearly articulated process and costing.						30	
Ability to execute and submit the report on timelines and provide a compiled report as segmented						20	
<b>TOTAL</b>						<b>100</b>	

The bids will be evaluated on a scale of 1 – 5 in accordance with the criteria below. The rating will be as follows: 1 = Very poor, 2 = Poor, 3 = Good, 4 = Very good, 5 = Excellent

Only service providers scoring higher than 60% will be considered during phase three (3).

### PHASE THREE (3): PRICE AND PREFERENTIAL PROCUREMENT POLICY

Bidders scoring less than 60 points in Phase 2 will not be eligible for Phase 3 evaluation i.e. pricing and preferential procurement.

- Please provide details for all the above information to enable proper evaluation.

### PHASE 3: PREFERENTIAL PROCUREMENT POLICY AND PRICING

**Please Note:** CIPC 6.1 Preference Points Claim Form in terms of the PPPFA is attached for claiming above mentioned points, if not completed the company will automatically score 0 points

#### Preferential Procurement Policy

The bidders that have successfully progressed through to Phase 2 will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

#### Pricing

Pricing will be calculated using the lowest price quoted as the baseline, thus the lowest price quoted will achieve full marks, while all other quotes will achieve a weighted average mark based on the lowest price.

Description	Total
Price	80
BBBEE	20
<b>Total</b>	<b>100</b>

The bidder with the highest score will be recommended as the successful vendor.

#### 1. SUBMISSION OF PROPOSALS

Sealed proposals will be received at the Tender Box at the Reception, 77 Meintjies Street, Sunnyside, **the dti** campus, Block F.

#### Proposals should be addressed to:

Manager (Supply Chain Management)  
Companies and Intellectual Property Registration Office  
Block F, **the dti** Campus, 77 Meintjies Street,  
Sunnyside  
PRETORIA

#### ENQUIRIES

##### A. Supply Chain Enquiries

Mr Solomon Motshweni OR Ms Ntombi Maqhula

Contact No: (012) 394 5233 /45344

E-mail: [SMotshweni@cipc.co.za](mailto:SMotshweni@cipc.co.za) OR [Nmaqhula@cipc.co.za](mailto:Nmaqhula@cipc.co.za)

##### B. Technical Enquiries

Lalah Lesejane: Brand Management Specialist

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