



Request for Proposal:
**To provide SAICA with a mechanism to measure
member satisfaction**

Research Tender No 03/2010

Ref: 305637/BK/hh/11.3.2010

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1 Introduction

1.1 The South African Institute of Chartered Accountants

The South African Institute of Chartered Accountants (SAICA) is a not-for-profit organisation that provides a range of services to its more than 29 000 members. Over 23 000 members reside in South Africa and more than 6 000 are resident in countries around the world.

SAICA is governed by a board consisting of representatives of members and member groupings. The organisation has a full-time secretariat comprising over 130 people and it is headed up by the Chief Executive Officer, Matsobane Matlwa. Its head office is located at Bruma Lake in Gauteng and it has offices in Cape Town, Durban and Bloemfontein.

SAICA is a key supplier of financial skills to the market and has many stakeholders. First and foremost, it serves its members, however, it also has commitments to other stakeholders, including government and the community. It has over 10 000 trainees serving training contracts and several thousand students at SAICA accredited universities around the country. In terms of the Chartered Accountants Designation (Private) Act No 67 of 1993, members of SAICA have the right to use the CA (SA) designation.

Of its 23 000 members resident in South Africa, only 15% are black and therefore SAICA faces a significant challenge to transform its member base to better represent the population demographics of the country. To this end, SAICA, together with the Departments of Labour, Education, Science and Technology and many firms and companies, have invested millions of Rand in running programmes to assist and encourage black people to become Chartered Accountants. SAICA's transformation and development programmes are run through separate not-for-profit organisations which use the name 'Thuthuka' and are rapidly gaining recognition in the community.

SAICA is one of the pre-eminent accountancy institutes in the world and is a member of the Global Accounting Alliance (GAA) through which it works with the leading institutes in Australia, Canada, Great Britain and Ireland, New Zealand and the USA.

For more information about SAICA consult the SAICA website at <http://www.saica.co.za>.

1.2 Overview of research required

SAICA has over 29 000 members operating in many different fields and countries around the world. SAICA is a service organisation that provides a range of services to these members. In a fast changing and competitive world, it is critical that SAICA is able to measure on a regular and ongoing basis the extent to which it is meeting the requirements of members.

Whilst members of an institute, such as SAICA, have a strong loyalty to the CA (SA) brand, they demand high quality services and support. The service industry in today's global economy is very competitive. Member organisations and institutes, such as SAICA, are not exempt from this and SAICA operates in a business environment where there are many competitors.

This document is a formal Request for Proposal (RFP) for the supply to SAICA of a mechanism that will enable SAICA to measure member satisfaction with the range and quality of services rendered. The measurement process needs to take place at least half yearly and be measured against an initial benchmarking exercise. The measurement process also needs to identify key areas where SAICA is falling short or that need to be improved, so that the necessary corrective actions can be put in place.

SAICA is seeking to appoint a research company to conduct a benchmark exercise in May 2010 as well as half yearly measurements up until September 2011. The contract could be renewed thereafter, but at SAICA's sole discretion.



2 RFP Process

2.1 Process and timetable

The tender process will be undertaken as follows:

Research organisations are requested to submit a formal proposal.

Thereafter, a project team appointed by SAICA will review the supplier proposals against a set of pre-defined criteria and rate the candidates on their ability to satisfy the requirements. A shortlist of preferred suppliers will be chosen based upon compliance with the formal criteria. These suppliers may be asked to do a 30 minute presentation to the project team and answer questions on their proposals. Thereafter the project team will select a single supplier. SAICA and the chosen supplier will negotiate a contract for a specific time period before the supplier is given the go-ahead to proceed with the project and initial benchmarking.

▪ Release tender documentation (RFP)	14/03/10
▪ Briefing session at SAICA's offices for interested parties	
▪ @ 14h15	18/03/10
▪ Closure date for supplier proposals.....	29/03/10
▪ Tender review meeting	01/04/10
▪ Presentation by short-listed suppliers and review of supplier proposals completed	08/04/10
▪ Chosen supplier notified	08/04/10
▪ Unsuccessful suppliers notified	08/04/10
▪ Contract signed	14/04/10
▪ Supplier contract initiated	14/04/10
▪ Benchmark report	15/06/10

Whilst SAICA is issuing this RFP in good faith, it reserves the right to cancel or delay the process at any time without providing reasons therefor and reserves the right not to select any of the respondents to this RFP.

2.2 Proposals

- Formal proposals should be sent to Mncedi Mabona at the following address:

Mncedi Mabona
c/o The South African Institute of Chartered Accountants
Integritas, 7 Zulberg Close
Bruma Lake
2198

Tel No. (011) 621-6911
Fax No. (011) 621-6805
E-mail. bekin@saica.co.za

- Proposals must be in English.
- The prospective supplier must provide five (5) paper copies and one (1) electronic copy of the proposal. Documents supplied will not be returned. E-mail and fax responses are **NOT** acceptable.
- To be considered proposals should arrive at SAICA by the close of business (12h00) on 29 March 2010. There will be no public opening of the proposals.
- No extensions for submissions of the proposals will be granted. **Late submissions, no matter what the cause, will be automatically disqualified.**



- Any attempt to gain information on the RFP content and process in a manner deemed to be unfair or disadvantageous to other respondents, or any attempt to influence the outcome of the response evaluation will result in immediate disqualification from the RFP process.
- All costs associated with any aspect of developing a response to this RFP, including but not limited to collection and delivery, are for the respondent's account.

2.3 Questions and clarification

Any enquiries regarding this RFP content or process should be addressed to the Research Co-ordinator.

Contact:

Beki Nkala
Tel No. (011) 621-6718
Fax No. (011) 621-6768
Email. bekin@saica.co.za

Questions received and answers given will be placed on the SAICA website (www.saica.co.za) from time to time up to 25 March 2010 (the closing date for proposals).

A voluntary briefing session will be held for prospective suppliers between 12h00 and 13h00 on 18 March 2010 at SAICA's offices in Bruma Lake (See Appendix B for the address and map). Interested suppliers will also be afforded the opportunity to ask questions at this session.

2.4 Assessment of proposals

Unsuccessful respondents will be notified by fax and/or e-mail and SAICA reserves the right to re-select prospective suppliers should negotiations with the supplier originally selected prove unsatisfactory or non-productive. A contract with the successful supplier will only be deemed to be concluded when reduced to writing in a formal contract signed by the designated responsible persons of both parties.

Prospective suppliers are reminded that their submission and costing will form an integral part of the evaluation, selection and contracting process and will therefore be carried through to the contracting stage (See 2.1).

Proposals will be evaluated on the following criteria:

Demonstrated understanding of objectives and issues (Weighting 15%)

Supplier proposals will be assessed for their understanding of the objectives and scope of the research as indicated in the RFP.

Solution methodology (Weighting 30%)

The solution methodology used will be vital to the success of the project. It needs to be logical, practical and provide reliable results.

Relevant experience of the supplier (Weighting 20%)

The project team will assess the experience of the supplier, the team leader and the team members in conducting similar research. It may also call for references from clients. An important element will be a demonstration of ability to meet deadlines within tender specifications.

Broad Based Black Economic Empowerment (BEE) (Weighting 15%)

SAICA is a signatory to the BEE Charter for the accountancy profession. Compliance with BEE principles as evidenced in a BEE rating certificate will be taken into account by the project team.



Price (Weighting 20%)

Price is an important component of the evaluation, however, it will not be the most important aspect. The proposal will be judged in terms of all the criteria and the value that SAICA will derive from the research report.

3 Requirements

3.1 Scope

SAICA provides a variety of member services and products including publications, seminars, workshops, networking events, technical and ethics help lines as well as a suite of services available in an electronic format. It also provides a range of indirect services such as advocacy and promotion of the CA brand locally and internationally. In addition, SAICA has a number of projects where it takes a leadership role in the profession or in the community. These include its Thuthuka development programmes run at schools with a view to improving the standard of mathematics, English and accounting, programmes at universities, as well as programmes to assist local government to improve its financial processes. A key benefit of the SAICA service offering is the maintenance of the reputation and standing of the leadership position of the CA (SA) designation held by SAICA members.

SAICA needs a mechanism that enables it to measure how well it is doing in satisfying the needs of the membership as a whole and by constituency and geographic region.

The measurement should not be a detailed measure of every type of service but rather a high level measure that assesses the general perception of members regarding SAICA's service rendering. The member satisfaction measure is not intended as a performance measure of the organisation's staff on a departmental basis, but rather an overall measure that is, nevertheless, detailed enough to provide strategic guidance to the institution.

The measure needs to be conducted periodically and it should identify key trends and areas where SAICA is not meeting expectations and where it is exceeding expectations.

Some of the key areas that should be considered include:

- Adequacy and appropriateness of communications including perception of key messages
- Quality of products and services
- Appropriateness of products and services
- Leadership performance including technical standards, education and training standards and transformation
- Brand management
- Advocacy performance
- Service levels.

These are examples and are not meant to be comprehensive.

The solution could be the creation of a member satisfaction index, however the supplier may have an alternative approach which better meets the needs of SAICA. Therefore, SAICA is not being prescriptive in how the objectives should be achieved.

Because the perceptions and views of members from different constituencies and residing in different regions may be different, the solution needs to provide a reliable indicator or measure for each of these.

3.2 Definitions

3.2.1 Member constituency

Member constituency means the area in which members work. The key constituencies are:

- Members in large audit practices
- Members in medium-sized audit practices
- Members in small audit practices
- Members in business – large corporations



- Members in small and medium corporations
- Members in government
- Members in public enterprises
- Members in the academic field / academia
- Absentee members
- Other.

3.2.2 Geographic region

SAICA is divided into four local regions and absentee members in various countries:

- Northern region: covers Gauteng, Limpopo and Mpumalanga provinces
- Eastern Region: covers KwaZulu-Natal province
- Central Region: covers Free State, Northern Cape and North-West provinces
- Southern Region: covers Eastern and Western Cape provinces.
- Absentee members (mostly SAICA-UK, SAICA-Australia and other countries)

3.3 Exclusions

Members resident overseas and retired members.

3.4 Provision of information

The contracted organisation will be provided with all the information necessary to carry out surveys, including contact names, addresses, numbers and information about constituencies. SAICA will also provide copies of previous questionnaires and results. Confidentiality of this information is critical and use of the information for purposes other than this project will not be permitted.

3.5 Benchmark Timing

To provide SAICA with a benchmark with which to compare its ratings, SAICA would require the supplier to provide it with a benchmark measure by 30 June 2010.

3.6 Term of contract

To provide for a solution that gives SAICA an ongoing and consistent measure, SAICA is prepared to sign a two-year contract ending in September 2012 with the supplier. This contract may be renewed, but solely at the discretion of SAICA.

4 Proposal document

The proposal should include the information listed below. It should also deal with how issues highlighted in this document would be dealt with. In particular, it should deal with how best SAICA can obtain reliable information that can be used in decision-making, but which would not be prohibitively expensive.

4.1 Research organisation information

Provide the following information to enable the project team to be able to assess the organisation's ability to deal with the project:

- Vision, objectives
- Size, location
- Track record in conducting research and reporting thereon
- Number of years in operation
- Details of any sub-contractors to be used.

4.2 Statutory and general

The following information must be supplied with the submission:

- SARS tax clearance certificates
- Copy of company incorporation certificate(s)



- VAT registration certificates (Vat 103)
- BEE rating (refer to paragraph 2.4 for further information)
- A reference list of engagements of a similar nature to this project in Southern Africa, including contact details
- Nature of respondent's (and/or partner in the event of a consortium response) current and/or past business dealings with SAICA
- Declaration of any past, present or planned involvement with SAICA, either by way of employment or by way of any governing board, council or committee.

4.3 Proposed team

List the names of the persons who would be involved in the project, together with experience and qualifications and the extent to which they will be involved. If elements of the project are to be outsourced, similar information would be required about the sub-contractor.

4.4 Approach

Please outline your intended research methodology and approach to this project, stating main tasks and milestones involved. The proposal should clearly state how the research report will satisfy SAICA's requirements as described in this RFP.

The proposal should also indicate:

- How quantitative and/or qualitative methods of investigation will be applied
- What sample sizes will be used and how these samples will be selected from the population
- What assumptions will be made, and
- How the results will be presented so as to achieve the objectives of the research project.

The proposal does not need to include questionnaires that would be used.

The proposal could include alternative solutions with a recommended best solution.

4.5 Timetable, timelines and milestones

The proposal should outline the timetable, timelines and milestones.

4.6 Pricing

The attached pricing sheet must be completed in full. SAICA will not entertain pricing adjustments after the signing of any contracts, and it is therefore most important that all pricing elements are disclosed. Prices for each survey from May 2010 through to September 2011 need to be given. In addition, the pricing document should explain why the proposed price may vary from survey to survey.

All pricing shown must INCLUDE VAT (refer to the pricing document).

All pricing assumptions must be clearly documented. SAICA assumes that the pricing document as supplied is complete and covers all costs associated with this project.

The supplier is expected to provide all required equipment e.g. PCs, laptops, diskettes, overhead projectors etc. and stationery associated with providing the deliverables of this project.

The pricing schedule should be submitted in a separate envelope.

4.7 Reports

The chosen supplier is required to present a comprehensive quantitative result report, a qualitative executive summary report of key findings, as well as give a presentation of the results to a committee constituted by SAICA. The report should provide indices which measure current perceptions but should also be capable of being used as a benchmark against which future surveys can be compared.



Separate indices or measures should be presented for each member constituency and geographic region. Measures for each key area such as communications (key message perception), quality of services, brand management, should be presented in the report. Refer to paragraph 3.1 for examples of key areas.

Details of the responses to questionnaires and other research results should also be made available to SAICA but should not form part of the main report.

4.8 Terms and conditions

The proposal should set out any terms and conditions that the supplier would want to add into the contract should the proposal be accepted.

5 Other

5.1 Confidentiality

The tender organisation and SAICA agree to keep the terms of this tender and details of the tender organisation's proposal strictly confidential, including but not limited to any financial information provided, and shall not disclose the content thereof to any third party, except as required by law.

5.2 Copyright

Copyright of the reports provided in respect of this project will rest solely with SAICA.

5.3 Termination of contract

SAICA reserves the right, upon 2 (two) weeks written notice to the chosen supplier, to terminate the contract during any time and award the contract to an independent third party, due to the supplier's non-compliance, either to the agreed service standards or breach of any of the conditions of the contract.

5.4 BEE ratings

SAICA is a signatory to the BEE Charter for the accountancy profession. Compliance with BEE principles as evidenced in a BEE rating certificate will be taken into account by the project team. Tendering suppliers may submit an up-to-date rating certificate or they can obtain a self-assessment rating from B1SA www.b1sa.co.za. Tendering organisations wishing to obtain a rating from B1SA, should please contact Mr Mncedi Mabona who will provide them with instructions on how to register. This assessment will not cost the tendering company anything.

Mncedi Mabona
c/o The South African Institute of Chartered Accountants
Integritas, 7 Zulberg Close
Bruma Lake
2198

Tel No. (011) 621-6911
Fax No. (011) 621-6805
E-mail. mncedim@saica.co.za



SAICA

THE SOUTH AFRICAN INSTITUTE
OF CHARTERED ACCOUNTANTS

APPENDIX A

PRICING SCHEDULE

MEMBER SATISFACTION MECHANISM

Research Tender No 03/2010



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PRICING SCHEDULE

The pricing sheet must be completed in full. SAICA will not entertain pricing adjustments after the signing of any contracts and it is therefore most important that all pricing elements are disclosed.

All pricing shown must INCLUDE VAT.

All pricing assumptions must be clearly documented. SAICA assumes that the pricing document as supplied is complete and covers all costs associated with this project.

The supplier is expected to provide all required equipment e.g. PCs, laptops, diskettes, overhead projectors, etc and stationery associated with providing the deliverables of this project.

The pricing schedule must be submitted in a separate envelope.

This response sheet pertains to the complete service delivery scope for a **proposal to provide SAICA with a mechanism to measure member satisfaction.**



PRICING SCHEDULE

REQUEST FOR PROPOSAL: MEMBER SATISFACTION MECHANISM

NAME OF BIDDER:

CLOSING TIME 12H00 ON

29 MARCH 2010

OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF BID.

1. SAICA

SAICA is seeking to award the contract for a period of 2 (two) years. Surveys would need to be carried out as follows:

- June 2010 (Benchmark)
- September 2010
- March 2011
- September 2011

The contract could be extended thereafter, but at SAICA's sole discretion.

2. PRICING DETAIL

2.1 Benchmark exercise	Hours	Rand
Planning		
Preparation of questionnaire		
Field work		
Data capture		
Supervision		
Report writing and presentation		
Total cost		

2.2 Subsequent surveys	Hours	Rand
May 2010		
September 2010		
March 2011		
September 2011		
Total cost		

MAP OF BRUMA SHOWING SAICA'S OFFICES

