

**BIDDING DOCUMENT FOR THE PROVISION OF A SYNDICATED SERVICE DELIVERY,
CUSTOMER SATISFACTORY AND BRAND EQUITY FOR POSB 2024
PROCUREMENT REFERENCE NO: POSB 32-2024**

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DATE OF ISSUE	31 MAY 2024
CLOSING DATE	14 JUNE 2024
CLOSING TIME	10.00 HOURS

Chapter 1 Table of Contents

Part 1: Bidding Procedures

Part 2: Statement of Requirements

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PART 1: BIDDING PROCEDURES

1.1. BACKGROUND

POSB requires the services of a reputable organization to carry out an exhaustive Syndicated Customer Satisfaction Survey to measure and make recommendations on the Bank's segment specific and overall position relating to; customer service delivery, products and services, customer experience, customer satisfaction, customer loyalty and brand(s) and related brand health checks. The bank invites interested bidders to participate in the tender process.

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1.1. Preparation of Bids

You are requested to bid for the supply of the services specified in the Statement of Requirements below, by completing and returning the following documentation:

1. Fully sign Bid Submission Sheet in this Part.
2. Fully completed Statement of Requirements in Part 2.
3. Completed Bid-Securing Declaration.
4. The bidder **MUST** attach the following **MANDATORY** documents: -
 - a. Legal Documents - Certificate of Incorporation,
 - b. CR6 Form or CR14 form
 - c. Tax clearance certificate.
 - d. Company Profile
 - e. Valid VAT certificate (ITF 263)
 - f. Valid NSSA Clearance Certificate
 - g. At least 3 x **signed and authentic** reference letters from previous corporate customers indicating supplies of similar nature **excluding POSB reference letter**. References letters should indicate business conducted **within the past 5 years only**.
 - h. 3 months' active bank statement to show financial capability
- 5 Bidders must state the validity period (minimum of 120 days)
- 6 Bidders must state the delivery period.

You are advised to carefully read the complete Bidding Document before preparing your Bid.

The standard forms in this document may be retyped for completion but the Bidder is responsible for their accurate reproduction. All pages of the Bid must be clearly marked with the Procurement Reference Number above and the Bidder's name and any reference number.

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You are requested to submit a Proposal to provide the consultancy services detailed in the Statement of Requirements by submitting separate technical and financial proposals, as detailed below. The standard forms contained within this Request for Proposals may be retyped for completion, but the Consultant is responsible for their accurate reproduction.

You are advised to read carefully the complete Request for Proposals document.

1.2. Number of bids allowed

No Consultant may submit more than one bid, either individually or as a joint venture partner in another bid, except as a subcontractor. A conflict of interest will be deemed to arise if bids are received from more than one Consultancy owned, directly or indirectly, by the same person.

1.3 Clarifications

Clarification of the request for proposals document may be requested in writing by any Consultant up to **10 June 2024** and should be sent to hmadziwana@posb.co.zw copy procurement@posb.co.zw for attention of H. Madziwana or G. Sibanda. Consulting individuals who send their queries after the deadline will not be entertained. Responses will be made to all Consulting individuals who have requested for the bidding documents via email. Written copies of POSB's responses (Including an explanation of the query) will be sent to all prospective consulting individuals. Request for clarification and the response(s) shall form part of any final contract.

1.4 Preparation of Technical Proposals:

Technical proposals should contain the following documents and information:

Technical proposals should contain the following documents and information:

- 1) The Technical Proposal Submission Sheet in this Part.
- 2) A brief methodology for performing the services.
- 3) A workplan, showing the inputs by the Project Manager.
- 4) Detailed CVs of the Consultants
- 5) A summary of your experience in similar assignments, together with the reference letters from institutions where similar services were provided.
- 6) Copies of academic and professional Certificates
- 7) Membership to a professional body applicable.
- 8) Financial proposal showing all prices, taxes and costs.
- 9) 3 months' active bank statement to show financial capability

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1.5 Preparation of Financial Proposals:

Financial proposals should contain the following documents and information:

1. the Financial Proposal Submission Sheet in this Part.
2. the Breakdown of Contract Price form in this Part, showing all costs for the assignment, broken down into fees and reimbursable costs.

1.6 Basis of Pricing and Payment:

The contract will be a lump sum amount-based contract.

The contract price must be a fixed total lump sum, including all costs required to carry out the Services. The Breakdown of Contract Price may be used only for evaluation purposes and to determine the price for any additional services agreed.

1.7 Validity of Proposals:

The minimum period for which the Consultant's proposal must remain valid is 120 days from the deadline for submission of proposals.

1.8 Number of bids allowed

The bidder is not allowed to submit more than one bid, either individually or as a joint venture partner in another Bid, except as a subcontractor. A conflict of interest will be deemed to arise if bids are received from more than one Bidder owned, directly or indirectly, by the same person.

1.9 Submission of Bids

The technical and financial proposals should be provided as one set of tender documents.

Bidders are advised to bring in samples ahead of closing time and date. Samples to be brought to Procurement 15th Floor, Causeway Building.

The Bidder must mark the subject matter with the Procurement Reference Number and Description of requirements. **The bids shall be submitted electronically through email.**

Late bids will be rejected. POSB reserves the right to extend the bid submission deadline but will notify the bidder if they have made it beyond the screening stage.

Date of deadline: **14 JUNE 2024** **10.00 hours**

Submission address: tenders@posb.co.zw

Means of acceptance: **Electronically through email**

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The bid submission documents should be scanned as a single document bearing the tender number and description on the tender.

1.10 Bid opening

Due to Covid-19 Virus NO bidders and their representatives may witness the opening of bids, which will take place at the submission address immediately following the deadline.

1.11 Withdrawal, amendment or modification of Bids

A Bidder may withdraw, substitute, or modify its Bid after it has been submitted by sending a written notice, duly signed by an authorized representative. However, no Bid may be withdrawn, substituted, or modified in the interval between the deadline for submission of Bids and the expiration of the period of Bid validity specified by the Bidder or any extension of that period.

1.12 Delivery Requirements

The delivery period required (from the date of contract signing) and the destination for delivery are as indicated in the Delivery Schedule in Part 2.

1.13 Bid Prices and Discounts

The prices and discounts quoted by the Bidder in the Bid Submission Form and in the Price Schedules must conform to the requirements specified below.

Prices must be quoted as specified in the Price Schedule included in Part 2 Statement of Requirements. In quoting prices, the Bidder is free to use transportation through carriers registered in any eligible country and similarly may obtain insurance services from any eligible country. Prices quoted must include the following costs and components:

- (a) For Goods
 - (i) the price of the Goods and the cost of delivery to the destination, including the relevant INCOTERM, as stated in the Delivery Schedule.
 - (ii) the custom duties to be paid on the Goods on entry in Zimbabwe, if not already included.
 - (iii) Any other applicable import taxes.
 - (iv) any sales and other taxes due within Zimbabwe which will be payable on the Goods, if not already included.
 - (v) any rebate or mark-up of the local agent or representative.
- (b) for Related Services, (other than inland transportation and other services required to convey the Goods to their destination), whenever such Related Services are specified in the Schedule of Requirements:

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the price of each item comprising the Related Services (inclusive of any applicable taxes).

1.14 Bid Securing Declaration

- i. Any bid not accompanied by a Bid Securing Declaration will be rejected by the Procuring Entity as non-responsive.
- ii. The Bid- Securing Declaration of a Joint Venture (JV) must be in the name of the JV that submits the Bid. If the JV has not been legally constituted at the time of bidding, the Bid-Securing Declaration must be in the names of all intended partners.

1.15 Evaluation of Bids

Bid will be evaluated using the following methodology:

- 1. Preliminary examination to confirm that all documents required have been provided.
- 2. Technical evaluation to determine substantial responsiveness to the specifications in the Statement of Requirements.
- 3. Financial evaluation to determine the reasonableness of the pricing as compared with the bank's budget.

Bids failing any stage will be eliminated and not considered in subsequent stages

1.16 Evaluation criteria

The Procuring Entity's evaluation of a Bid will take into account, in addition to the Bid Price and Technical compliance, the following criteria and methodologies

- i. Delivery schedule: The specified services are required to be delivered by the agreed dates indicated on the issued Purchase Order.
- ii. NO Deviation in payment schedule: Payment will be made within 48 Hours following receipt of invoice and confirmation of satisfactory services by POSB and no deviation from this arrangement will be considered.

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1.17 Eligibility and Qualification Criteria

Bidders are required to meet the criteria set out in the *Preparation for Bids* section 1.1 of this tender document to be eligible to participate and to be qualified for the proposed contract. They must therefore provide any available documentation and certify their eligibility in the Bid Submission Sheet. To be eligible, Bidders must

- i. have the legal capacity to enter into a contract.
- ii. not be insolvent, in receivership, bankrupt or being wound up, not have had business activities suspended and not be the subject of legal proceedings for any of these circumstances.
- iii. have fulfilled their obligations to pay taxes and social security contributions in Zimbabwe.
- iv. not have a conflict of interest in relation to this procurement requirement.
- v. Are of Zimbabwean nationality

1.18 Technical Criteria

The Technical Specifications Sheet details the minimum specification of the services required. The services offered must meet this specification, but no credit will be given for exceeding the specification.

1.19 Bid Currency:

Bids should be priced in United States Dollars (US\$)

1.20 Payment Currency:

Payment will be processed in ZiG at rate of exchange on willing buyer willing seller basis on day of payment.

1.21 Award of Contract

The proposed award of contract will be by issue of a Notification of Contract Award which will be effective until signature of the contract documents. The Bank reserves the right not to notify unsuccessful bidders on the outcome of the Evaluation.

1.22 Right to Reject

POSB reserves the right to accept or reject any Bid or to cancel the procurement process at any time prior to the contract award.

1.23 Corrupt Practices

The POSB requires that Bidders and Consultants observe the highest standard of ethics during the procurement and execution of contracts. In pursuit of this policy:

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1. POSB will reject a recommendation for award if it determines that the Bidder recommended for award has, directly or through an agent, engaged in corrupt, fraudulent, collusive, or coercive practices in competing for the Contract or been declared ineligible to be awarded a procurement contract.
2. POSB may impose the sanctions on fraudulent bidders; and
3. any conflict of interest on the part of the Bidder must be declared.

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Bid Submission Sheet

{Note to the Bidder: Complete this form with all the requested details and submit it as the first page of your Bid. Attach the completed Statement of Requirements and any other documents requested in Part 1. Ensure that your Bid is authorized in the signature block below. A signature and authorization on this form will confirm that the terms and conditions of this Bid prevail over any attachments. If your Bid is not authorized, it may be rejected.

Procurement Reference Number:

Subject of Procurement:

Name of Bidder:

Bidder's Reference Number:

Date of Bid:

We offer to perform the services listed in the Statement of Requirements to the indicated specifications and standards, at the prices indicated on the attached Price Schedule and in accordance with the terms and conditions stated in your Bidding Document referenced above.

We confirm that we meet the eligibility criteria specified in Part 1: Procedures of Bidding.

We declare that we are not debarred from bidding and that the documents we submit are true and correct.

The validity period of our bid is: {days} from the date of submission.

We confirm that the prices quoted in the attached Price Schedule are fixed and firm for the duration of the validity period and will not be subject to revision, variation or adjustment.

Bid Authorized by:

Signature	Name:
Position:	Date:(DD/MM/YY) Authorized
for and on behalf of:	
Company	
Address:	
.....	

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1) SCOPE OF WORK- CUSTOMER SATISFACTION SURVEY

POSB requires the services of a reputable organization to carry out an exhaustive Syndicated Customer Satisfaction Survey to measure and make recommendations on the Bank's segment specific and overall position relating to; customer service delivery, products and services, customer experience, customer satisfaction, customer loyalty and brand(s) and related brand health checks. The results must be delivered as following for the year 2023.

- Assess POSB's service delivery situation,
- Determine POSB's customer satisfaction situation, measures and indices,
- Establish the levels of POSB's product/ service awareness and appeal per segment and overall, for the Bank,
- Discover the POSB Brand situation,
- Manage customer retention,
- Reduce customer churn,
- Delight customers into brand ambassadors,
- Overcoming negative customer experience,
- Build and protect brand reputation,

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2) TECHNICAL REQUIREMENTS

EVALUATION CRITERIA	MINIMUM REQUIREMENTS	POSSIBLE SCORE (points)
Experience of organization conducting customer satisfaction and brand awareness research projects.	<ol style="list-style-type: none"> 1. Number of years bidder has been carrying research works, (minimum 5 years) as per company registration documents. 2. Company profile and detailed organizational structure. 	<p>3 2 Total Score 5</p>
Qualification and experience of key personnel	<ol style="list-style-type: none"> 1. Project Manager or Lead Consultant – CVs and proof of relevant qualifications (Graduate qualification in Economics, Statistic, Psychology, Marketing or other relevant degree). 2. Research/ Data Analyst - CVs and proof of relevant qualifications (Graduate qualification in Economics, Statistic, Psychology, Marketing or other relevant degree). 3. Field supervisors and or interviewers – CVs and proof of relevant qualifications (Graduate qualification in Economics, Statistic, Psychology, Marketing or other relevant degree). 	<p>5 5 5 Total Score 15</p>
Proof of previous works done and client confirmation of the same	<p>Proven experience in design and implementation of quantitative and qualitative studies/surveys on customer satisfaction, consumer behavior and brand matrices. This should be evidenced by submission of reference letters from 3 organizations for work done in the past 5 years, that is from 2018 to 2023. One reference should be from an organization in the financial service sector, other than POSB. The letter should be on the company letterhead, signed by a significant authority and stamped, dated 2024.</p> <ul style="list-style-type: none"> • Non-financial services organization reference letter 1, within the period 2018 to 2023, dated 2024, signed and stamped • Non-financial services organization reference letter 2, within the period 2018 to 2024, dated 2023, signed and stamped • Financial services organization reference letter, 	<p>8 6 Total Score 14</p>

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<p>Data Analysis Methods and Categories</p>	<p>1. Demonstration of the use of statistical package(s) for data capturing and analysis such as SPSS, STATA or any similar program/software.</p> <p>2. Brief discussion/demonstration of the proposed method or formula to be used to calculate the</p> <ul style="list-style-type: none"> • Customer Satisfaction Index • Net Promoter Score • Customer lifetime Value • Voice of customers • Customer churn rate • Average resolution time • First response time • Brand and Products awareness Index • Top of mind awareness • Prompted awareness • Aided awareness • Customer Effort Score • Customer Equity • Brand Equity • Brand recall <p>3. Demonstration of statistical validity of methods proposed.</p>	<p>5</p> <p>5</p> <p>4</p> <p>Total Score 14</p>
<p>Operational Capabilities</p>	<p>1. Formal business premises with valid respective operating licenses(POSB reserves the right to visit premises).</p> <p>2. 3 months' active bank statement to show financial capability</p>	<p>3</p> <p>5</p> <p>Total Score= 8</p>
<p>Mechanism of Data Collection</p>	<p>The approach(es) for the baseline study should include discussions/description of the following:</p> <ol style="list-style-type: none"> 1. explanation of methodological choice 2. appropriate mix of tools and methods for data collection for both quantitative and qualitative components 3. sampling design 4. indicators 5. plan for pre-test questionnaires 	<p>4</p> <p>4</p> <p>2</p> <p>2</p>

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	<p>6. plan for conducting training for data collectors 7. analysis; limitations; risks and mitigation strategies 8. quality assurance mechanisms</p>	<p>2 2 2 2 Total score = 20</p>
<p>Practical Assessment</p>	<p>1.Workplan Detailed workplan showing the breakdown of activities in the 8-week period. Activities should include but not limited to: Research Problem, Literature Review, Research Design, Research process, Preparation of research results and submission of research findings. Further provide a short summary of what each activity entails and give examples where appropriate. A timeline and short summary of activity will both carry 2 marks. Two (2) more marks will be awarded to bidders who provide additional relevant information on the workplan and activities.</p>	<p>12 2 Total Score =14</p>
	<p>2.Key Consideration Bidders are expected to have carried brief research about the POSB brand and provide the following. Who we are? Targeted customer segment Branch network Main competition Delivery channels available</p>	<p>2 2 2 2 2 Total Score =10</p>

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Score		100%
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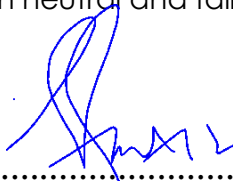
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3) FINANCIAL REQUIREMENTS

Bidders must clearly provide comprehensive pricing information for the syndicated customer satisfaction survey. All price quotations include VAT.

Declaration by the Accounting Officer

I declare that the procurement is based on neutral and fair technical requirements and bidder qualifications.



G Changunda **Signature** **Date**

Chief Executive Officer

Company Stamp

Signed on 3 Jun 2024, 11:14 AM CAT

Bid-Securing Declaration

{The Bidder must fill in this Form in accordance with the instructions indicated, where it has been stated in the Bidding Procedures that a Bid-Securing Declaration is a requirement of bidding}.

Procurement Reference number:

Date:[date (in day, month and year format)]

Bidder’s Reference Number:

To: {full name of Procuring Entity}

We, the undersigned, declare that:

We understand that, according to the terms and conditions of your bidding documents, bids must be supported by a Bid-Securing Declaration.

We accept that we may be debarred from being eligible for bidding for any contract with a Procuring Entity in Zimbabwe for a period to be determined by the Authority, if we are in breach of our obligation(s) under the bidding conditions, because:

- (a) we have withdrawn our Bid during the period of Bid validity; or
- (b) having been notified of the acceptance of our Bid by the Procuring Entity during the period of bid validity, we fail or refuse to execute the Contract.

We understand this Bid Securing Declaration will expire if we are not the successful Bidder, upon our receiving your notification to us of the name of the successful Bidder; or twenty-eight days after the expiration of our Bid, whichever is the earlier.

Signed	Name:
	...
In capacity of:	Date:
	(DD/MM/YY)
Duly authorised for and on behalf of:	
Company	
Address:	
.....	
Corporate Seal (where appropriate)	

{Note: In case of a Joint Venture, the Bid Securing Declaration must be in the name of all partners to the Joint Venture that submits the Bid.}