



**TERMS OF REFERENCE/BRIEFING INFO
FOR PUBLICATION OF FSB ANNUAL REPORT AND OTHER REPORTS OF THE FSB
2009/2010**

1. INTRODUCTION

The Financial Services Board (FSB) is a unique independent institution established by statute to oversee the South African Non-Banking Financial Services Industry in the public interest. Our mission and vision is to promote and maintain a sound financial investment environment in South Africa. Please visit the FSB website on www.fsb.co.za for further background on the FSB and view our previous Annual reports.

The FSB invites tenders from suitable service providers to assist in the publication of the FSB Annual Report 2009/2010.

2. SCOPE OF WORK

The publication of the Annual Reports will include the following A4 full colour booklets:

REPORT	ESTIMATED NUMBER OF COPIES	ESTIMATED NUMBER OF PAGES Excl cover	DELIVERY DATE to FSB 2010
FSB Annual Report 2010	3 000	145-165	1 Sept
Pension Funds Annual Report 2007/2008	1 200	60-70	20 Oct/Nov
Friendly Societies Annual Report	500	30-45	27 Oct/Nov
Collective Investment Schemes Annual Report	600	45-50	28 May
Long-term Insurance Annual Report:12th Report for calendar year 2009	1 000	96 to 100	30 Nov
Short-term Insurance Annual Report:12th Report for calendar year 2009	1 000	82 to 86	30 Nov

Size:	A4
Copywriting:	Included
Editing, proofreading :	Included
Photography:	Included

2.1 PRINTING

Colours: Full colour throughout

Stock: Cover: To be dictated by the design; 300 gsm.
Text: To be dictated by the design; 135 gsm.

Finish: Cover Matt Laminated, inner machine varnished throughout; perfect bind in case of FSB Annual Report; staples in case of others/saddle stitch for durability . May include spot varnish/or di-cuts design dependant

Quantity: The estimated number of copies is included in the above table and may differ at the finalisation.



2.2 CONCEPTUALISING AND DESIGN

For conceptualising and developing a theme and design.

Design development includes plotting & generating organograms, maps, graphs, pie charts, and digital artwork such as deep etching and cropping.

2.3 REPRODUCTION AND LAYOUT

Typesetting and layout of copy, which will be supplied in electronic format in MicroSoft Office, e.g. Word and Excel. Supplier to supply final proofs and generate electronic generation of plates for printing; provide the FSB with an electronic version for web publishing.

2.4 QUALITY ASSURANCE

The contractor shall ensure that all work conforms to the highest professional standards. Such work may further be subject to an external quality assurance as may be considered necessary. Quality assurance is required in terms of colour accuracy and consistency; registration; paper; binding; folding; size accuracy and consistency; packaging; packaging material; quantity; and overall appearance. The Annual report must comply with the FSB Corporate identity which will be supplied by the FSB.

The Annual Reports of Long-term and Short-term Insurance have certain tables that are prepared in Excel and must be printed by a method that will ensure complete integrity and accuracy so that the FSB representative will not be required to proofread those tables.

2.5 EXAMPLES

Examples of previous annual reports can be inspected at the premises of the FSB. Most of the publications can also be viewed on the website of the FSB at the following address: www.fsb.co.za under publications.

2.6 OTHER IMPORTANT INFORMATION

Supplier to acquire ISBN from the Government Printers, and this number must be printed on the back cover of the Report. .

The FSB logo has the following colour breakdown:

Process

Blue: C100; M72; Y0; K56

Bronze: C36; M53; Y78; K7

Spot

Blue: Pantone 282

Bronze: Pantone 875

2.7 PACKAGING AND DELIVERY

For the Annual Report of the FSB the following is required:



1 500 copies placed in FSB permit envelopes for posting, delivered with the rest of the copies to the office of the FSB.

Final Draft Annual Report to be sent to Minister, National Treasury and the Auditor General. Board Secretariat to ensure that this is done.

500 copies must be delivered via courier to Parliament in Cape Town. The address will be confirmed at finalisation of the report. Board Secretariat to ensure that this is done.

Copies to be sent to all national libraries of South Africa. List provided by Government when applying for ISBN no's

3. Criteria

The following criteria will be used for evaluation of the bid:

- **Technical Criteria/Experience** -Relevant academic qualification of the project team as well as their experience 15%
- **Quality and Service** - Experience in similar or related projects including a minimum of three **references 40%**
- **Project planning** - with intermediate and final outputs and id timeframes 15%
- **Pricing** 30%

3.1 PRICING SCHEDULE

Only fixed prices will be accepted. Price variations can only be applied if the number of pages or copies varies or changes.

The pricing schedule should include separate prices for the following:

- Editing and proof reading
- Conceptualisation and design
- Reproduction, layout and typesetting (charts and graphs, Digital artwork, Tables, cover design)
- Photography (2 separate days, one for board members and another for HOD's Individual photos as well as Group/Theme studio photographs) Board Secretariat to oversee bookings.
- Disk - Repro ready
- CD with artwork, open files, images and the Report in PDF format for wed usage.
- Total price for printing on the estimated number of pages, binding etc.
- Postage and packaging in envelopes
- Draft 1 – Require 7 colour copies, thereafter 2 colour copies. Final draft – 7 colour copies. (this quantity only applies to the FSB General AR) Requirements will differ per individual Annual report.

3.2 TECHNICAL CRITERIA/QUALITY/SERVICE/PRICING

The firms' previous experience will be evaluated for the allocation of these points.

The following information should be included in the bid documentation:

- Summary of similar projects done in the past three years
- Include at least three examples of projects mentioned above.



- Any awards received for work
- Qualifications of employees/company
- Example of a project plan and method of Methodology followed for planning of project and management

3.3 HDI

The 80/20 principle will apply with 80% being the content and the 20% toward BEE status.

4. Submission Instructions

- **Physical printed copies**

The original official forms included in the tender pack must be placed in a separate sealed envelope.

The FSB requires four (4) printed copies of your documents supporting the technical criteria as stated above and reserves the right to make further copies as needed for this evaluation.

Clearly mark the physical copies of your submissions must be couriered or hand-delivered to the following address and marked as follows:

TENDER NO: 01/2010

Financial Services Board
Riverwalk Office Park, Block B
41 Matroosberg Road,
Extension 6,
Ashlea Gardens

- ***Submission Deadline***

All responses to this document should be submitted by no later than:

15 February 2010 at 16:00

FSB reserves the right to reject any submissions received after this deadline. It remains the respondents' duty to ensure that submissions are received by FSB at the above address before the deadline.

Under no circumstances will extensions be granted to any respondent.