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**TERMS OF REFERENCE**

**BID NO: PROJ/LPD/2021/22/01**

**APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EVENTS MANAGEMENT SERVICES  
FOR THE MANAGEMENT OF INSETA INSURANCE CAREER INDABA**

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## 1. BACKGROUND

- 1.1 The Insurance Sector Education and Training Authority (INSETA) is a public entity listed in schedule 3A of the PFMA and was established in March 2000. The INSETA must perform, in accordance with any prescribed requirements of the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), the Constitution and any other relevant legislation.

## 2. PURPOSE

The INSETA Insurance Career Indaba is a Two-part event consisting of: (a Convention and a Career Guidance Exhibition) taking place over a two-day period on the 29<sup>th</sup> – 30<sup>th</sup> November 2021. The purpose of this Request for Proposal (RFP) competitive bid process is to invite events management service providers to submit their proposals for:

- 2.1 The Logistics Management, Pre & Post the event
- 2.2 Issuing of invitations and coordinating RSVPs, and managing all event communication,
- 2.3 Guest Relations - accommodation and onsite management (including COVID 19 Safety Protocol) of the INSETA Insurance Career Indaba Event hosted in Zululand district, Northern KwaZulu Natal.

## 3. SCOPE OF WORK

The bidder's proposal must be inclusive (but not limited to) the following requirements:

### 3.1. Planning

- 3.1.1 **Event schedule:** Create a project plan with deadlines, key milestones outlining seamless interaction between the two parts of the event (Convention: 200 Delegates indoors, and Career Exhibition: 1000 Learners Grade 8 – 12 and TVET College Learners (over 2 days), Exhibitors: 20 Exhibitor Stands with X2 Exhibitor Representative)
- 3.1.2 **Logistics:** create a logistics roster covering pre to post event activities. Negotiating a Conference package for all attendees and a lunch pack for all students
- 3.1.3 **Theme and Aesthetics:** Provide options for the Convention and Career exhibition and themes that will be incorporated in all promotions, printed materials, and onsite signage.
- 3.1.4 **Budget:** Manage overall budget throughout the project. **(no variations to budget will be allowed)**



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- 3.1.5 **Management of Invitations and RSVP:** the service provider is to create efficient and effective system that will allow the INSETA to ascertain the possible success or failure of the event.
- 3.1.6 **Co-ordination and Management of the Career Guidance Exhibition:** Liaise with the Department of Basic Education and TVET College management for required approvals.
- 3.1.7 **Security and emergency services:** the service provider must ensure that the necessary security and disaster management measures are in place.
- 3.1.8 **Event Certificates:** the service provider must comply with the necessary certification to host an outdoor event (In line with the Disaster Management protocols i.e., COVID 19 regulations)

## 3.2. Event Promotions

- 3.2.1 **Target Audience:** Learners from DBE, TVET College, Insurance and other financial related Stakeholders, Traditional House Representatives and Government Representatives as well as surrounding communities.
- 3.2.2 **Promotions:** Coordinate all marketing efforts to promote the event to the required target audience via, Mass Media Platforms (TV-Radio-Billboards-Print), social media platforms and INSETA marketing platforms.
- 3.2.3 **Registration System:** The service provider will be required to provide a registration system which must include pre-event registration, onsite registration, and a creation of a QR code for access to the event. Providing Lanyards for all attendees on arrival – hosted at the registration desk
- 3.2.4 **Design, distribution of invites and management of RSVPs:** The service provider will be responsible for the management and design of invites for circulation. This should be provided in weekly Steering Committee meetings leading up until the event takes place.
- 3.2.5 **Convention and Career Guidance exhibition marketing materials:** INSETA will provide guidance on marketing materials required (printed and digital). The service provider will be required to produce (design, print, bind and distribute) and prepare material for distribution at the event.

## 3.3. Service Provider Responsibilities for the INSETA INSURANCE INDABA/ DELIVERABLES

- 3.3.1 **Staff coordination:** Manage communications with staff involved with the event including marketing/sales/customer services staff, delegates, and speakers.
- 3.3.2 Source a venue to host the event around Zululand district, Northern KwaZulu Natal (for Convention & Career exhibition). Venue must be easily accessible and in line with all protocols to host an event at a stadium. Security, emergency services, health and safety, seating arrangements, and other requirements and outputs relevant to the overall preparation of an event of this magnitude should be taken into consideration
- 3.3.3 Responsible for tasks that includes technical bookings, arrangements with subcontractors such as catering, audio visual, transport and security services.
- 3.3.4 **Onsite signage:** Supply all onsite signage for the event.



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- 3.3.5 **Audio Visual:** Ensure that all audio-visual requirements for the Convention and Career Exhibition are managed by the appointed service provider.
- 3.3.6 Be onsite to manage logistics with INSETA and venue staff to ensure a well-coordinated event.
- 3.3.7 Event Staffing including Registration personnel (registration to be conducted both digitally and manually) for Convention and Career Exhibition, Ushers assisting with learner rotation, guests, and distribution of INSETA material.
- 3.3.8 ***Travel and accommodation must be excluded from the bidder's proposal.***
- 3.3.9 Identify and escalate aspects of any risk associated with the event.
- 3.3.10 Set up a holding room for VIPs to accommodate 30 people. There must be table, chairs, and refreshments.
- 3.3.11 **Convention Segment**
  - a) Backdrop and Staging: Source and provide custom designed backdrop, staging and furnishing (convention).
  - b) Define Seating arrangements to comply with Covid 19 regulations under the Disaster Management Act
  - c) Provide a Podium and PA System including microphones, lapels, 2x big screens (100 – 120-inch projector screen)

### 3.3.13 Career Exhibition Segment

- a) Liaise with the provincial Department of Education District office for the permission and relevant TVET College to release the learners as per the region. To provide proof of approval letter from the Department of Education District office and TVET College at least 2-weeks prior to the event.
- b) Identify schools and TVET Colleges in the Zululand district and surrounding rural areas to be invited to the career guidance event for 1000 learners (500 per day over 2 days for Grade 8 - 12 and TVET College Learners.
- c) Send invitation letters to the identified schools and TVET Colleges, confirm attendance of the Grade 8 - 12 Learners and TVET College Learners (Provide proof of approval to INSETA).
- d) Liaise, procure, and confirm transport for the 1000 learners from their respective schools and TVET College to the venue and back again to their respective schools / TVET College. Bidder must ensure that learner consent forms are signed and filed for audit purposes.
- e) Prepare and coordinate signing of the indemnity forms for all the learners attending the event.
- f) Arrange for learners to sign the registers per School – TVET College at the event.
- g) Invite and confirm stakeholders to exhibit at the event (SETAs, Insurance Companies, Professional Bodies, TVETs and Institutions of higher learning).
- h) Provide entertaining Master of Ceremonies for event.
- i) Provide a Public Announcement system.
- j) Supply and building of 3x3 shell schemes, 2 chairs per exhibition stall, 1 table per exhibition stall for a total of 20 exhibition stalls manned by 2 exhibitors per stall (total 40 exhibitor personnel). There must be sufficient electrical facilities for lightning and viewing of DVDs on the stand



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#### 4. CATERING

##### 4.1 Convention and Holding Room (DHET Executives, SETA Officials, HET Officials and INSETA Stakeholders, Government and/or Mayoral Officials, Zulu Royal House)

- 4.1.1 2 Day Catering for convention and holding room VIP delegates. Cater for any Special dietary Meals Requirements (Halaal, vegetarian)
- 4.1.2 Arrange catering for approximately 240 stakeholders/exhibitors for 2 days. – based on confirmation of RSVP
  - a) VIP estimated maximum number **50 (price range breakfast 150 and lunch 250)**
  - b) Stakeholders, exhibitors' maximum number **190 (price range breakfast R100 and lunch R 150)**
- 4.1.3 There must be catering prepared for the holding room delegates.
- 4.1.4 Provide x 2000 500ml Still bottled water (**for the duration of the event**)
- 4.1.5 Bidder must negotiate the most cost-effective pricing for the above-mentioned requirements.

##### 4.2 Career Guidance Exhibition

- 4.2.1 Provide to an estimated 1000 lunch packs for the learners comprising at a cost of R100 per learner – based on confirmation of RSVP.
- 4.2.2 The food packs must adhere to Health Regulations standard. Lunch pack to consist of the following:
  - a) 100% pure fruit Juice (250ml)
  - b) Fruit
  - c) Hotdog roll
  - d) Packet of chips 80g

#### 5. CONTRACTUAL OBLIGATION

- 5.1 All prices indicated in the pricing schedule must remain fixed for the remainder of the project, bidder to provide **all-inclusive pricing (Total cost)** based on services and/or goods required.
- 5.2 In the case of the service provider using sub-contractors, the former will be responsible for ensuring delivery of services from any such sub-contractors and for making any payments to such sub-contractors.
- 5.3 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (**upon parties contracting**).
- 5.4 INSETA will provide a INSETA Corporate Identity Manual to the awarded bidder upon contracting

6. **ABSENCE OF OBLIGATION & CONFIDENTIALITY**

- 6.1 No legal or other obligation shall arise between the service provider and INSETA unless/until both parties have signed a formal contract or Service Level Agreement in place.
- 6.2 The Contract site is at **INSETA office building (as and when required)**.

7. **PREQUALIFICATION CRITERIA (Phase 1)**

- 7.1 Bidder must provide proof of valid **(BBBEE Certificate accredited by SANAS or DTI or CIPC template of a BBBEE Sworn Affidavit) and must be an EME or QSE or GENERIC (level 1 or level 2 BBBEE contributor)** status will be considered.

***Note: All bidders who do not comply with the items listed above will be disqualified.***

8. **MANDATORY CRITERIA (Phase 2)**

- 8.1 Bidder must submit proof of registration on CSD (Central Supplier Database).

***Note: All bidders who do not comply with the items listed above will be disqualified.***

9. **EVALUATION CRITERIA**

- 9.1 Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria is designed to reflect the INSETA's requirements in terms of identifying a suitable service provider and ensure the selection process is transparent and affords all the bidders a fair opportunity for evaluation and selection.

9.2 **Functional Evaluation threshold**

- 9.2.1. The tender submission will be functionally evaluated out of **75 points (phase 3)**, should the bidder/s not meet the required points, they will be disqualified and will **not qualify for BBBEE & Price Preference (Phase 4)**

9.3 **Functional Evaluation Criteria Phase 3:**

- 9.3.1. The evaluation is based on functionality, which will be evaluated using the following criteria and points:



Evaluation Area	Evaluation Criterion	Points
<p><b>At least 5 years' company operational experience reflected on the reference letter in the field of:</b></p> <ul style="list-style-type: none"> <li>• Concept development</li> <li>• Working with a SETA or Education institutions or Department of Higher Education and Training on career development in rural areas/ conferences planned in rural areas for events with over 2000 attendees or more</li> <li>• Have planned rural events in any of the of the following provinces: KZN, Limpopo, Eastern Cape, Northern Cape Province, North West</li> <li>• RSVP Systems</li> <li>• Full Technical and Production support</li> </ul>	<p>The bidder must provide evidence in the form of reference letters for events management.</p> <p>Reference letters - dated and signed with contactable references</p> <ul style="list-style-type: none"> <li>• 5 and above reference letters of completed similar projects = <b>35 points</b></li> <li>• Minimum of 3-4 reference letters of completed similar projects = <b>20 points</b></li> </ul> <p>Bidder to provide Portfolio of Evidence (POE) of a minimum of three (3) events completed in a digital format submitted with a bid (POE to be aligned to the reference letters submitted) = <b>5 points</b></p> <p><b>Non-compliance with the minimum criteria = 0 points</b></p>	<p><b>40</b></p>
<p><b>Project Plan (GANTT Chart).</b></p> <p>The bidder must provide a high-level project plan which demonstrates the following:</p> <ul style="list-style-type: none"> <li>• Planning and conceptualization</li> <li>• Target dates (29-30 November 2021)</li> <li>• Provision for space requirements</li> <li>• Full Production &amp; Technical setup</li> <li>• Planning the marketing and promotion material</li> <li>• Mapping out the event schedule</li> <li>• RSVP Processing</li> <li>• Close-out report</li> </ul>	<p>The bidder must provide a high-level project plan should demonstrate efficient management of the entire project from inception to conclusion = <b>35 points</b></p> <p><b>Non-compliance with all the above criteria = 0 points</b></p>	<p><b>35</b></p>

<p><b>Dedicated Project Manager with relevant expertise in providing project management services</b></p> <p><i>Working together for a skilled tomorrow</i></p> <ul style="list-style-type: none"> <li>• <b>At least 5 years' experience in providing required project management services</b></li> </ul>	<p>Bidder to provide a dedicated Project Manager Curriculum Vitae (CV) with proof of years of relevant experience</p> <p><b>Project Manager:</b> The Project Manager's CV must reflect the following requirements:</p> <ul style="list-style-type: none"> <li>• Must have minimum NQF Level 6 qualification on Project Management or Events Management (or both)</li> <li>• Must have above 5 years' experience in Events Management = <b>25 Points</b></li> <li>• Must have 5 years' experience in Events Management = <b>15 Points</b></li> </ul> <p><b>Non-compliance with the minimum criteria = 0 points</b></p>	<p><b>25</b></p>
<p><b>TOTAL</b></p>		<p><b>100</b></p>

9.3.2. Bidders who obtain less than the minimum threshold of **75 points** will be declared non-responsive and therefore will not be eligible for evaluation of BBEE & Price Preference.

#### 9.4 Preference Evaluation BBEE and Price: Phase 3

9.4.1. As the tender **price is estimated to be below R50 million**, the tender responses will be evaluated on the **80/20**-point system.

### 10. ADJUDICATION USING A POINT SYSTEM

- 10.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder
- 10.2 Preference points shall be calculated after process has been brought to a comparative basis considering all factors of non-firm prices.
- 10.3 If two or more bids have scored equal points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 10.4 However, when functionality is part of the evaluation process and two or more bids have scored equal points for B-BBEE, the successful bid must be the one scoring the highest score for functionality
- 10.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.



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## 11. POINTS AWARDED FOR PRICE

The **80/20** preference point system

A maximum of **80** points is allocated for price on the following basis:

$$P_s = 80 \{1 - (P_t - P_{\min})\}$$

P min

Where:

P <sub>s</sub>	=	Points scored for comparative price of bid under Consideration
P <sub>t</sub>	=	Comparative price of bid under consideration
P <sub>min</sub>	=	Comparative price of lowest acceptable bid

## 12. B-BBEE PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

B-BBEE Status Level of contributor	Number of points 80/20 system
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 12.1** Bidders who qualify as EME's and QSE's in terms of the B-BBEE Act must submit a Sworn affidavit. Misrepresentation of information constitutes a criminal offence.
- 12.2** Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by SANAS.
- 12.3** A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 12.4** A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

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**12.5** Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

**12.6 Consortium**

12.6.1. A consortium is an association of two or more individuals, companies, organisations, or governments (or any combination of these entities) with the objective of participating in a common activity or pooling their resources for achieving a common goal.

12.6.2. A consortium requires that each participant retains its separate legal status and the consortium's control over each participant is generally limited to activities involving the joint endeavor, particularly the division of profits. A consortium is formed by contract, which delineates the rights and obligations of each member.

12.6.3. In a consortium, only the lead bidder's credentials both in terms of financial and technical qualifications are considered. Therefore, the interpretation and application to a RFQ/Bid process is such that the lead partner is identified, and the following requirements are required as follows:

a) **Lead Partner**

- All administrative documents (consortium agreement between the lead partner and the partner)
- Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intent and purpose fulfils the requirements of the bid through combination of skills)

b) **Partner**

- Proof of CSD registration.
- Tax Pin.
- BBBEE Sworn-Affidavit.
- SBD 4 Declaration of interest.
- SBD 8 Past supply chain.

12.6.4. It should be taken into cognizance that although the lead partner is the qualifying entity, the partner should prove that it can do business with state-owned entities, through CSD registration, proof that the taxes are compliant, its level of BBBEE status to align with the BBBEE status level required by the BID, declare interest and answer questions that it is not a disqualified entity with the National Treasury. The foregoing ensures compliance from an SCM process perspective that the consortium is in order.

12.6.5. Of importance is that in a consortium, each individual team members retain their identities.

**12.7 A joint venture**

12.7.1. A joint venture is a business entity created by two or more parties, generally characterized by shared ownership, returns and risks and shared governance.



## 12.8 **Unincorporated joint venture:**

12.8.1. All SCM documents are filled in by the joint venture in the name of the joint venture, although the submission of administrative documents (partnership agreement between parties) will be completed in the name of the joint venture, and the following will be required from both parties, amongst others

- a) SBD 4.
- b) SBD 6.
- c) SBD 8.
- d) SBD 9.
- e) Tax pin
- f) CSD registration.
- g) The JV agreement will direct which bank account of the two entities will be used.
- h) Consolidated Joint BBEE Certificate.

## 12.9 **Incorporated joint venture**

12.9.1. This aligned to a registered entity or company. A registered entity/ company with a consolidated BBEE certificate and a bank account in the name of the Joint venture. The required compliance documents must be complete by the entity/ company the name of the joint venture, and the following will be required amongst others

- a) SBD 4.
- b) SBD 6.
- c) SBD 8.
- d) SBD 9.
- e) Tax pin
- f) CSD registration.
- g) The JV agreement will direct which bank account of the two entities will be used.
- h) Consolidated Joint BBEE Certificate.

12.9.2. A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.

**12.10** A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.

**12.11** A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.

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- 12.12** A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.

### **13. COMMUNICATION**

Respondents are warned that a response will be disqualified should any attempt be made by a bidder either directly or indirectly to canvass any officer(s) or employees of INSETA in respect of BID process, between the closing date and the date of the award of the business.

All enquiries relating to this BID should be emailed **three (3) days before the closing date.**

### **14. CONDITIONS TO BE OBSERVED WHEN BIDDING**

The organization does not bind itself to accept the lowest or any BID, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of his BID submission. The organization also reserves the right to withdraw or cancel the BID at any stage.

No BID shall be deemed to have been accepted unless and until a formal contract / letter of award is prepared and executed.

The competitive shall remain open for acceptance by the Organization for a period of **120 days** from the closing date of the BID Enquiry.

**INSETA reserves the right to:**

- 14.1.** Not evaluate and award a bid that do not comply strictly with this BID document.
- 14.2.** Make a selection solely on the information received in the Bid Document and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the terms of reference.
- 14.3.** Contact any bidder during the evaluation process, to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the BID shall be sought, offered, or permitted.
- 14.4.** Cancel this BID at any time as prescribed in the PPPFA regulation.
- 14.5.** Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the of cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

### **15. Cost of Bidding**

- 15.1** The bidder shall bear all costs and expenses associated with preparation and submission of its BID submission and the INSETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.



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**16. Note to Bidders:**

**16.1** Due diligence to be conducted by INSETA prior to the award of the contract.

**END OF TERMS OF REFERENCE DOCUMENT**

