



### **REQUEST FOR QUOTATION (RFQ)**

*Working together for a skilled tomorrow*

**APPOINTMENT OF A PANEL OR FRAMEWORK CONTRACT FOR PROCUREMENT OF HOST VENUES FOR THE IMPLEMENTATION OF EISA EXAMINATIONS IN GAUTENG, DURBAN AND CAPE TOWN FOR SEVEN (7) REGISTERED OCCUPATIONAL QUALIFICATIONS. THIS APPOINTMENT WILL BE FOR A PERIOD OF EIGHTEEN (18) MONTHS**

<b>RFQ</b>	<b>RFQ/2021/22/143</b>
<b>RFQ ISSUE DATE</b>	<b>23 NOVEMBER 2021</b>
<b>RFQ DESCRIPTION</b>	<b>APPOINTMENT OF A PANEL OR FRAMEWORK CONTRACT FOR PROCUREMENT OF HOST VENUES FOR THE IMPLEMENTATION OF EISA EXAMINATIONS IN GAUTENG, DURBAN AND CAPE TOWN FOR SEVEN (7) REGISTERED OCCUPATIONAL QUALIFICATIONS. THIS APPOINTMENT WILL BE FOR A PERIOD OF EIGHTEEN (18) MONTHS</b>
<b>CLOSING DATE &amp; TIME</b>	<b>26 NOVEMBER 2021 @ 11h00</b>
<b>LOCATION FOR SUBMISSIONS</b>	<a href="mailto:rfqs@inseta.org.za">rfqs@inseta.org.za</a>

**Bidders must submit responses via e-mail at: [rfqs@inseta.org.za](mailto:rfqs@inseta.org.za). For any queries or questions, please use above mentioned email address.**

The INSETA requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. **Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

FAX NO: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

## 1. BACKGROUND

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

1.2 The Quality Council for Trades and Occupations (QCTO) is a regulated body that quality assures the provision of Occupations Qualifications (OQs) in South Africa. The INSETA/QCTO Service Level Agreement (SLA) signed in December 2020 mandates INSETA as a QCTO delegated Development Quality Partners (DQP) as well as an Assessment Quality Partner (AQP) to among other:

- 1.2.1 Develop, review and implement the roll-out of OQs for implementations by delegated bodies.
- 1.2.2 Manage the implementation of External Integrated Summative Assessments (EISA) examinations for OQs.
- 1.2.3 Recommend Skills Development Providers (SDPs) as well as suitable Assessment Centres to host EISA examinations.

1.3 The assessment centre(s)/venue(s) must be accredited by QCTO as an assessment centre for ANY or All of the following OQs:

SAQA ID Code	Occupation Qualification Title	NQF Level	Credits
91784	Insurance Agent – Insurance Underwriter	Level 05	156
99668	Claims Administration – Claims Assessor	Level 04	131
105030	Health Care Benefits Advisor	Level 05	102
105022	Long-Term Insurance Advisor	Level 05	180
105025	Employee and Pension Fund Benefits Advisor	Level 05	110
105021	Investment Advisor	Level 06	213
99574	Professional Principal Executive Officer.	Level 05	120

**NB:** each exam sitting session is a minimum of 3 hours

1.4 Therefore, the INSETA is requiring suitable examination venues that have been accredited by QCTO to host EISA examinations (on-demand) for specified Occupational Qualifications.

## 2. PURPOSE

The sourcing of QCTO accredited examination venues is expected to carry out the functions in terms of the QCTO approved EISA examination venue guidelines. These guidelines can be found at website [www.qcto.org.za](http://www.qcto.org.za)

## 3. SCOPE OF WORK

The successful bidder(s) is required to perform the following services:

- 3.1 Provide suitable examination venues (on-demand) that can host a minimum of 20 learners per scheduled session(s). It is expected that during the period of this appointment, a total of Four (4) exam sessions will be held.
- 3.2 Perform examination related administrative services including:
  - 3.2.1 Safe storage of examination instruments couriered by INSETA to the centre.
  - 3.2.2 Completing a supervision/invigilation report – template will be provided by INSETA.
  - 3.2.3 Where necessary, manage and complete an irregularity report for each exam.
  - 3.2.4 Maintaining an examination attendance register for candidates & invigilating team.
  - 3.2.5 Other as directed by INSETA.
- 3.3 Provide exam supervision/invigilating services including:
  - 3.3.1 Appoint and train invigilators (ratio: 1 invigilator to 15 candidates) for each scheduled exam session.
  - 3.3.2 Appoint a competent examination centre manager or supervisor for each scheduled exam session.
  - 3.3.3 Audit of performance information (AOPO)
- 3.4 Manage the return through courier/hand delivery of examination scripts and related documents after each completed examination session. Examination scripts and related documents (reports/registers etc) must reach INSETA head-office within 2 days of completing the exam session

## 4. DELIVERABLES

Bidder must comply with the performance areas as follows:

- 4.1 Provide QCTO accredited exam venue(s) that can host a minimum of 20 candidates per session.
- 4.2 An appointed examination Centre Manager.
- 4.3 Appointed exam Invigilator(s) at ratio (1 invigilator to 15 candidates).
- 4.4 Training of Invigilator(s) pre-invigilation services (per 5.3 above).
- 4.5 Administrative services including reports, managing courier documents etc.
- 4.6 Hosting of exam to be performed in accordance QCTO - EISA exam requirements.
- 4.7 **Bidder to indicate where the venue is situated.**

## 5. KEY PERFORMANCE INDICATORS

Key Responsibilities	Activities	Results Indicators (Including all applicable evidence to substantiate against all key responsibilities)
<b>Accreditation</b>	Pre-condition: venue must be accredited as an assessment centre for specified OQ reflecting qualification title and SAQA ID number.	Valid QCTO accreditation letter.
<b>Appointment of Examination Centre Manager/Supervisor</b>	Recruitment of Centre Manager(s) to oversee implementation of exam(s).	Signed appointment letter.
<b>Appointment of Invigilators</b>	Recruitment of Invigilators for each exam schedule.	Signed appointment letter(s)
<b>Training of Invigilators</b>	Training of Invigilators to supervise the examination per determined candidate ratio. An INSETA invigilator training manual can be provided.	Invigilator training attendance register.
<b>Other Admin Services</b>	Receiving of exam instruments pre- exam (courier). Returning of exam documents to INSETA post exam (courier or hand delivery) i.e., scripts, reports etc.	Courier company confirmation of document delivery/receipt.

## 6. TIMEFRAMES

6.1 The duration of the contract will be for period of **18 months** from the date of appointment.

## 7. CONTRACTUAL OBLIGATION

- 7.1 Bidder rate-based pricing will be fixed for the duration of the contract.
- 7.2 Bidder will be expected to sign SBD 7.2 contract form upon award.
- 7.3 Bidder will be issued a PO on request of services as and when require.
- 7.4 The contract value will be capped at **R 1 000 000,00 including VAT for services as and required.**
- 7.5 The service provider's quotation must also provide sufficient detail in terms of various cost items such as total "man" hours and daily rates for the project team.
- 7.6 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.
- 7.7 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (**upon parties contracting**)
- 7.8 Bidder must comply to any relevant legislative framework including but not limited to POPI Act 4 2013.

## 8. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 8.1. 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.
- 8.2. The Contract site is at **INSETA (as and when required)**.

## 9. WORKMEN AND SUPERVISION ON SITE

- 9.1. The service provider shall be held responsible for the conduct of his employees and the conduct of his sub-contractor's employees for the full duration of the contract.

## 10. MANDATORY CRITERIA

- 10.1 The bidder must provide evidence in the form of a Valid QCTO Accreditation Letter. The letter must reflect:
  - 10.1.1 QCTO Accreditation Number
  - 10.1.2 Name(s) of qualifications accredited for
  - 10.1.3 SAQA ID number for each OQ accredited for.
  - 10.1.4 Accreditation start and end date. Provide a schedule of past and current successful similar fundraising services. Experience in raising funds from local donors or grants will be an added advantage.
- 10.2 Experience to host supervised exams. Bidder to provide List of previous supervised exams indicating:
  - 10.2.1 Name(s) / Title(s) of each qualification hosted
  - 10.2.2 Name of quality assuring body for each qualification
  - 10.2.3 Date(s) when the exam(s) was written/hosted

***Note: Bidders who are non-compliant with the mandatory criteria will result in automatic disqualification and therefore will not be eligible for evaluation of BBBEE & Price Preference.***

## 11. PRICING SCHEDULE

11.1 Bidder to prepare their pricing according to the availability of venue (irrespective of the number of qualifications being written on the day). Pricing must include items listed in the below table but not limited to:

Section / Category (as per the terms of reference)	Number of sessions (18 months)	Price per item (session hosted)	Total
Provide suitable examination venues (on-demand) that can host a minimum of 20 learners per scheduled session(s).	4		
Perform examination related administrative services			
Provide exam supervision/invigilating services			
Manage the return through courier/hand delivery of examination scripts and related documents after each completed examination session.			
Other costs			
<b>Sub-Total</b>			
<b>VAT (15%)</b>			
<b>Total</b>			

## 12. Preference Evaluation:

### 12.1 BBBEE and Price

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

## 13. ADJUDICATION USING A POINT SYSTEM

- 13.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 13.2 Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 13.3 In the event that two or more bids have scored equal points in terms of price and preference points for BBBEE, the successful bid must be the one scoring the highest number of preference points for BBBEE - in terms of PPPFA Regulation 2017 – Section 11 (1) & (2)
- 13.4 However, when functionality is part of the evaluation process and two or more bids have scored equal points for BBBEE, the successful bid must be the one scoring the highest score for functionality.
- 13.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

#### 14. POINTS AWARDED FOR PRICE AND BBEE PREFERENCE POINT

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:

$P_s$  = Points scored for comparative price of bid under Consideration

$P_t$  = Comparative price of bid under consideration

$P_{\min}$  = Comparative price of lowest acceptable bid

#### 15. 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

**15.1** 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.

- 15.2** 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.
- 15.3** 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.

## **16. Consortium**

- 16.1.** 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.
- 16.2.** 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 endeavour, particularly the division of profits. A consortium is formed by contract, which designates the rights and obligations of each member.
- 16.3.** 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.
- 16.4.** It should be taken into cognisance 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 in order 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.

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

## 17. A joint venture

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

## 18. Unincorporated joint venture:

18.1. 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 BBBEE Certificate.

## 19. Incorporated joint venture

19.1 This aligned to a registered entity or company. A registered entity/ company with a consolidated BBBEE 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 BBBEE Certificate.

- 19.2** 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.
- 19.3** 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.

## **20. 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 days before the closing date**.

## **21. 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:**

- 21.1** Not evaluate and award a bid that do not comply strictly with this BID document.
- 21.2** 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.
- 21.3** Contact any bidder during the evaluation process, in order 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.

- 21.4 Cancel this BID at any time as prescribed in the PPPFA regulation.
- 21.5 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.

## 22. Cost of Bidding

- 22.1 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.

## 23. Note to Bidders:

- 23.1 Due diligence to be conducted by INSETA prior to the award of the contract.

**END OF TERMS OF RFQ DOCUMENT**

**Annexed to this document for completion and return with the document:**

- Declaration of Interest (SBD 4),
- Preference Points Claim Form (SBD 6.1),
- Declaration of Bidder's Past Supply Chain Practices (SBD 8),
- Certificate of Independent Bid Determination (SBD 9)
- Initialled General Conditions of Contract (GCC)

**Non – compliance in returning above mentioned documents, will deem the bid nonresponsive.**

