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REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A SERVICE PROVIDER TO DRAFT, WRITE, EDIT, DESIGN, LAYOUT AND PRINT THE INSETA ANNUAL REPORT

RFQ	
RFQ ISSUE DATE	16 May 2022
BRIEFING SESSION	N/A
RFQ DESCRIPTION	Appointment of a service provider to draft, write, edit, design, layout and print the INSETA Annual Report
CLOSING DATE & TIME	20 May 2022 at 14:00
LOCATION FOR SUBMISSIONS	rfqs@inseta.org.za

Bidders must submit responses via e-mail at: rfqs@inseta.org.za, before on the stipulated date and time. 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: _____

Board Members: Mr. J.S. Ngubane (Chairperson), Ms. V. Pearson (Business), Ms. L. van der Merwe (Business), Ms. R.G. Govender (Business), Ms. P. Mendes (Business), Ms. S.J. Kruger (Business), Ms. Z. Motsa (Business), Mr. R.P. Motlhabane (Labour), Mr. M. Soobramoney (Labour), Mr. J.J.M. Mabena (Labour), Ms. S.A. Anders (Labour), Mr. C.B. Botha (Labour), Ms. S.T. Dinyake (Labour), Ms. F. Mabaso (Government), Mr. S.M. Mpuru (Community Organisation)

CEO: G. Mkhize

DETAILED SPECIFICATION

APPOINTMENT OF A SERVICE PROVIDER TO DRAFT, WRITE, EDIT, DESIGN, LAYOUT AND PRINT THE INSETA ANNUAL REPORT

1. BACKGROUND

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, 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.

INSETA is a Schedule 3A Public Entity in terms of the Public Finance Management Act No 1 of 1999, as amended (PFMA). This therefore implies that the INSETA must fully comply with all the requirements of the PFMA as well as the Irregular Expenditure Framework.

The objective of this request is to appoint a competent service provider to conceptualise, design, layout, print and deliver the INSETA **2021 - 2022** Annual Report. The Annual Report provides a comprehensive report on the activities and financial performance of the organisation throughout the preceding year according to the Skills Development mandate.

2. TERMS OF REFERENCE

2.1 Technical Outcome of the Annual Report

- 2.1.1 Quantity: 300
- 2.1.2 Size: A3 folded to A4
- 2.1.3 Orientation: Portrait
- 2.1.4 Pages Cover: 4 pages
- 2.1.5 Inner Pages: Approximately 120 pages (may vary by 10% - bidder to include variation in costing)
- 2.1.6 Colour: Full Colour Throughout
- 2.1.7 Paper Cover: 350gsm Matt Art
- 2.1.8 Finishing: Inner pages' machines throughout, cover matte with spot gloss
- 2.1.9 Cover: Matt with elements of UV Varnish combined with Skodix spot varnish - Foiling of the INSETA Logo and Name
- 2.1.10 Perfect Bound
- 2.1.11 Type setting: Annual Report Guide for Schedule 3A and 3C Public Entities
- 2.1.12 Bidder must make provision for photo stock for sector imagery- Maximum 10 stock photos

2.2 Conceptualisation

- 2.2.1 Bidder is required to design the thematic 'look and feel' that best represents the INSETA for its financial and strategic performance – aligned to the INSETA Corporate identity manual (***this document will be circulated as an Annexure to the RFQ document***)
- 2.2.2 The bidder is required to provide a concept theme centred with a rationale for futuristic insurance related cover, insurance related images for the **2021/2022**
- 2.2.3 The Annual Report theme needs to reflect a strong futuristic insurance approach including imagery on the INSETA sectors.
- 2.2.4 The design concept fee should be inclusive of the final quoted project costing.

2.3 Design and Layout

Bidders design layout must be:

- 2.3.1 High Resolution scanning, photographic manipulation, etching and cropping where required
- 2.3.2 Creation and creative manipulation of graphs and tables, where applicable applying 3-D effects for a futuristic reporting aspect.

2.4 Content Management

- 2.4.1 Copy: Text Bidder must conduct interviews with the Chairperson, CEO, Executive Management and Department heads to finalise their content for the Annual report. Strong technical writing skills for annual report is required.
- 2.4.2 Bidder is required to include Professional Proof-Reading services before Draft Annual Report gets submitted to the (1) National Treasury and (2) Auditor General as well as Department of Higher Education, Science and Technology.
- 2.4.3 Before the final Draft Annual report gets final signoff, it is to be proof-read again before it goes to print and presented to (3) Parliament. - *In total provision of three (3) rounds of professional proof readings will be required.*
- 2.4.4 Supplier to show exceptional project management skills with quick turnaround times and be meticulous in managing content (version control), reporting progress timeously and required to attend status updates meetings as and when required.

2.5 Pre-Press Management

- 2.5.1 Bureau – ready file generation
- 2.5.2 Impositioning (where applicable)
- 2.5.3 Colour and layout proofing from AGFA (or similar) colour correct play outs

2.6 Printing (draft)

- 2.6.1 3 x Draft Annual Reports in Word Format to be printed and bound (**as it will be submitted to the Auditor General and DHET for viewing & approval, and to provide an authorised proof copy for the INSETA- as part of the proof reading exercise**)

2.7 Deliverable- print and distribution (final)

- 2.7.1 Computer to press lithographic printing
- 2.7.2 5X CDs with high-resolution PDF and Professional Windows Format (MS-word) of Annual Report
- 2.7.3 2X CDs with low resolution PDF and Professional Windows Format (MS-word) of Annual Report
- 2.7.4 A total of **300 copies** of the Annual Reports to be printed and distributed as follows:
- **INSETA Office in Parktown:** 190 copies
 - **Parliament of the Republic of South Africa:** 65 copies + 1 CD with high-resolution PDF and Professional Windows Format (MS-word) of Annual Report
 - **Department of Higher Education, Science and Technology:** 31 copies + high-resolution PDF and Professional Windows Format (MS-word) of Annual Report
 - **Auditor General, Pretoria:** 10 copies
 - **National Treasury – Pretoria:** 2 copies
 - **National Treasury – Madiba Building, Pretoria:** 2 copies
- 2.7.5 An online version of the Annual Report as an e-book for uploading on the INSETA SETA website.
- 2.7.6 Bidder to make provision for courier costs all above mentioned sites.
- 2.7.7 **2020/2021 PowerPoint Presentation**
- The service provider will also be required to design and conceptualise a creative PowerPoint presentation that translates key elements of the **2021/2022** Annual Report. Maximum 50 slides
- 2.7.8 Copy: Text to be supplied electronically by the **INSETA**.

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3. COSTING

3.1 The quotation must reflect a detailed cost breakdown indicating the following:

See table below as reference: (Pricing must include a detailed cost breakdown but not limited to)

Line items to be delivered	Qty	Unit Price	Price
Technical Outcome of the Annual Report (Copies, in-line with the RFQ specification)			
DTP and layout - Additional Services - or photo stock, Conceptualization, image sourcing, Design and Layout			
Disc preparation including production and e-book (digital copies)			
PowerPoint Presentation slides including artwork in full colour			
Infographics (in-line with the RFQ specification)			
Content Management – copy writing, editing and proof reading			
Delivery and Courier costs (for the project as well as the distribution of samples) - print and distribution (in-line with RFQ specification)			
Project Management fee/ Miscellaneous			
Sub total			
VAT			
Total Price			

4. CONTRACT CONDITION

4.1 Bidder must clearly include all associated total cost of delivery of goods or services including but not limited to the list above.

5. PRE-QUALIFICATION CRITERIA

5.1 Proof of registration on CSD (**Central Supplier Database**)

5.2 Bidder must sign, complete, and submit Standard Bid document (**SBD4**)

5.3 Bidder must submit a BBEE Certificate accredited by SANAS *only* or Sworn Affidavit on an applicable *DTI template or CIPC template*.

5.4 RFQ bid document must be completed, **signed, and initialled** by the authorised company representative.

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

6. FUNCTIONAL EVALUATION CRITERIA

6.1 BBBEE and Price

6.1.1 As the RFQ price is estimated to be between **R 30 000.00 and R 500 000.00**, therefore RFQ responses will be evaluated on the **80/20** Price & BBBEE preference point system.

6.2 Functional Evaluation

6.2.1 The RFQ submission will be technically evaluated out of a maximum of **100. (phase 1)** a threshold of **70** out of the **100** has been set, bidders who fail to minimum threshold will be deemed non-responsive and will not qualify for further evaluation against phase 2.

6.2.2 Phase 2 will be evaluated against a threshold of **30 points. Bidders who do not meet the set threshold of 30, will be deemed non-responsive and will be disqualified for further evaluation of BBBEE & Price Preference.**

6.2.3 Assessment of evaluation of the functional/ technical criteria will be based on the tables below:

Phase 1:

Category	Description	Maximum points
Experience and track record	<p>Bidder is required to provide a Portfolio of Evidence (with contactable references) related to the bidder's experience in conceptualising, design layout, printing, and distribution of Annual Reports. <i>Experience on similar work done particularly for 3A public entities.</i></p> <p>Number of projects completed: 1-3 projects completed = 10 points 3 -6 projects completed = 20 points Above 6 projects completed = 30 points</p> <p><i>Non-compliance with the minimum requirement = 0 points</i></p>	30
Approach and methodology aligned to a detailed project plan	<p>Bidder to demonstrate detailed approach, methodology and process aligned to timeframes (project plan) to be adopted in the project as aligned to the deliverables detailed in section 2 of the RFQ document.</p> <p>Project plan must be linked to the deliverables and outputs (distribution) to be completed on the 15th of August 2022.</p> <p>Detailed project plan = 40 points</p>	40

<p>Proven capacity of team to deliver in time</p>	<p>Evaluation of the capacity of the appointed team to manage the project and deliver a quality product in time.</p> <p>Above 2 years' experience of any of the key staff (Designer, Technical writer, Content manager and Project manager) with a minimum of 2 examples of previous work as well as CV of previous annual reports written = 10 points</p> <p>Between 2- and 5-years' experience of any of the key staff (Designer, Technical writer, Content manager and Project manager) but less than 5 examples of previous projects as well as CV of previous annual reports written = 20 points</p> <p>Above 5 years' experience of any of the key staff (Designer, Technical writer, Content manager and Project manager) but more than 10 examples of previous projects as well as CV of previous annual reports written = 30 points</p> <p>Note: the projects in this factor refer to those delivered by the designer, content management or project manager in any past company, not limited to the bidding company, i.e. linked to the individual</p>	<p>30</p>
<p>TOTAL</p>		<p>100</p>

Phase 2:

<p>Digital and hard copy samples (Delivered to INSETA 24 hours after request)</p>	<p>Bidder is required to provide digital sample (online version) and hard copy (<i>hard copies will be kept by INSETA for audit purposes, and POPI conditions will be applied</i>) of previous work completed – Annual Reports.</p> <p>1-3 projects completed = 10 points 3 -6 projects completed = 20 points Above 6 projects completed = 30 points</p> <p>Bidders will be informed, after shortlisting, of delivery address to send hard copy sample. The same sample must reflect in the digital and hard copy – 4 x copies hard copies</p>	<p>30</p>
<p>TOTAL</p>		<p>30</p>

Note: All bidders achieving less than the set threshold will be declared non-responsive.

6.2.4 Bidders are required to pass the minimum threshold of **10 points** on the functional criteria to be considered for the final phase which is price and BBEE.

6.2.5 Bidders who score less than **10 points** will **not** be considered for the final phase, and thus be disqualified.

7. ADJUDICATION USING A POINT SYSTEM

- 7.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder
- 7.2 Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 7.3 In the event that 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.
- 7.4 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
- 7.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

8. POINTS AWARDED FOR PRICE

The **80/20** preference point system

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

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

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

9. 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

- 9.1 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.
- 9.2 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.
- 9.3 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.
- 9.4 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.
- 9.5 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.
- 9.6 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.
- 9.7 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.

10. 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 a RFQ, between the closing date and the date of the award of the business.

All enquiries relating to this RFQ should be emailed three days before the closing date.

11. CONDITIONS TO BE OBSERVED WHEN RFQING

INSETA does not bind itself to accept the lowest or any RFQ, 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 RFQ. INSETA reserves the right to accept a separate RFQ or separate RFQs for any one or more of the sections of a specification. The corporation also reserves the right to withdraw the RFQ at any stage.

No RFQ shall be deemed to have been accepted unless and until a formal contract / letter of intent is prepared and executed. Quotation shall remain open for acceptance by the Corporation for a period of **90 days** from the closing date of the RFQ Enquiry.

INSETA reserves the right to:

- 11.1 Not evaluate and award RFQs that do not comply strictly with this RFQ document.
- 11.2 Make a selection solely on the information received in the RFQs and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the evaluation of this RFQ.
- 11.3 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 RFQ shall be sought, offered or permitted.
- 11.4 Award a contract to one or more bidder(s).
- 11.5 Accept any RFQ in part or full at its own discretion.
- 11.6 Cancel this RFQ or any part thereof at any time as prescribed in the PPPFA regulation.
- 11.7 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the greatest benefit to the Corporation and not necessarily on the basis of the lowest costs.

12. Cost of Bidding

The bidder shall bear all costs and expenses associated with preparation and submission of its RFQ or RFQ, 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.

END OF RFQ DOCUMENT

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

- Preference Points Claim Form (SBD 6.1), Declaration of bidders (SBD 4),
- General Conditions of Contract (GCC)

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

