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**REQUEST FOR QUOTATION (RFQ)**

**APPOINTMENT OF A FACILITATOR FOR THE EXECUTIVE MANAGERS AND BOARD STRATEGIC PLANNING SESSIONS AND DEVELOPMENT OF THE STRATEGIC PLAN, AS WELL AS THE ANNUAL PERFORMANCE PLAN.**

RFQ	RFQ/2022/23/1023
RFQ ISSUE DATE	23 JUNE 2022
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A FACILITATOR FOR THE EXECUTIVE MANAGERS AND BOARD STRATEGIC PLANNING SESSIONS AND DEVELOPMENT OF THE STRATEGIC PLAN, AS WELL AS THE ANNUAL PERFORMANCE PLAN
CLOSING DATE & TIME	30 JUNE 2022 at 14h00
LOCATION FOR SUBMISSIONS	<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), 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.

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

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

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

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

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

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

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

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

## **DETAILED SPECIFICATION**

### **APPOINTMENT OF A FACILITATOR FOR THE INSETA EXECUTIVE MANAGERS AND BOARD STRATEGIC PLANNING SESSIONS AND DEVELOPMENT OF THE STRATEGIC PLAN, AS WELL AS THE ANNUAL PERFORMANCE PLAN.**

#### **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, 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 Insurance Sector Education and Training Authority [INSETA] seeks to appoint a qualified professional service provider to provide facilitation services for the INSETA Executive Managers and Board strategic planning sessions and development of the strategic plan, as well as the annual performance plan.

#### **2. SCOPE OF WORK**

The bidder is required to provide a proposal in compliance with the below scope of work:

- 2.1** Conduct briefing sessions in preparation of the Strategic Planning sessions with the INSETA Executives,
- 2.2** Peruse documentation relevant to the assignment in preparation for the Strategic Planning session.
- 2.3** Study the achievements, constraints and challenges facing the INSETA in the last few years.
- 2.4** Benchmarking with other institutions and identification of best practices.
- 2.5** Prepare a presentation and facilitate the Board Strategic Planning Session & Executive Managers session based on benchmarking and research undertaken.
- 2.6** Facilitate the Strategic planning sessions and apply strategies to solicit constructive discussions to ensure that the objectives are met.
- 2.7** Write preliminary report on the strategic planning session for discussion with Executive Management and inputs from the Board.
- 2.8** Prepare final report on the strategic planning session as a reflection of the proceedings including action plan and recommendations.
- 2.9** Bidder to provide evidence of understanding the Sector Education Training Authority Landscape.

### 3. DELIVERABLES AND PROJECT TIMELINES

The bidder must provide a methodology in full compliance to the scope work and project plan with the reference to the below mentioned timelines (subject to confirmation upon appointment by INSETA)

- 3.1 Briefing Session with Executive Managers-(week of the 1 July 2022), bidder to set aside 1 day. *(Virtual and face to face)*
- 3.2 Extended Manco Session (11 July 2022)
- 3.3 Manco Session (2 August 2022)
- 3.4 Board Strategic Session on 17 August 2022 bidder to set an aside 1 day. *(Virtual)*
- 3.5 Draft, develop and submit the strategic plan and annual performance plan to INSETA, and make provision for a minimum of 5 drafts prior to finalisation and approval by INSETA.
- 3.6 Provision for professional writing, editing and proof reading before final submission to INSETA.
- 3.7 Preparation of the consolidated and closeout report.

### 4. LEGISLATIVE COMPLIANCE AND KNOWLEDGE

Bidder must be display compliance and knowledge in terms of the following legislations and areas of functionality applicable to a SETA environment:

- 4.1 The relevant skills development and related legislation, including the Skills Development Act, 1999 as amended and the latest skills development regulations and the Skills Development Levies Act, 1999.
- 4.2 Public Finance Management Act specific to a scheduled 3 entities.
- 4.3 Bidder must adhere to Protection of Personal Information (POPI) Act.

### 7. ADMINISTRATIVE COMPLIANCE

- 7.1 The Standard Bid Document (SBD) forms as annexured to this RFQ must be fully completed, signed by the authorized company representative.
- 7.2 Bidders must initial each page of General Conditions of Contract (GCC).

### 5. PREQUALIFICATION

- 5.1 Proof of registration on CSD (**Central Supplier Database**)
- 5.2 RFQ bid document must be completed, **signed, and initialed each page** by the authorised company representative.
- 5.3 The Bidder Disclosure (SBD 4) must be fully completed.

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

### 6. MANDATORY CRITERIA

- 6.1 The bidder must submit a minimum of three (3) reference letters with contactable references (Email or telephone contact) experience in providing strategic planning sessions and development of the Strategic Plan and Annual Performance Plan. The reference letters must be signed and must on the Company letterhead.

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

## 7. PRICING CONSIDERATIONS:

- 7.1 Service providers must ensure that the price quotations are inclusive of all applicable taxes **(including VAT)**. Costing must comprise to all the relevant service proposed in the bidder submission.

Activities as per the deliverables and scope work as detailed in this RFQ document				
No.	Description	Rate	Per day	Tootal cost
1.	Briefing Session with Executives Management <b>(Week of the 1 July 2022)</b> ,-bidder to set an aside 1 day. <i>(Virtual and face to face)</i>			
2.	Extended Manco Session <b>(11 July 2022)</b> bidder to set aside 1 day. aside <i>(Virtual and face to face)</i>			
3.	Manco Session <b>(02 August 2022)</b> -bidder to set an aside 1 day. <i>(Face to face)</i>			
4.	Board Strategic Session week of the <b>(17 August 2022)</b> , bidder to set an aside 1 day. <i>(Virtual)</i>			
5.	Draft, develop and submit the strategic plan and annual performance plan to INSETA, and make provision for a minimum of 5 drafts prior to finalisation and approval by INSETA.			
6.	Provision for professional writing, editing and proof reading before final submission to INSETA.			
7.	Preparation of the consolidated and closeout report.			
<b>Subtotal</b>				
<b>Vat</b>				
<b>Total</b>				

## 8. CONTRACTUAL OBLIGATION

- 8.1 The bidder will be required to sign to SBD 7.2 contract form with the bidder's approved submission as annexure to the contract.
- 8.2 Compliance with the general conditions of contract.
- 8.3 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.
- 8.4 The successful bidder will be required to have adequate professional indemnity as well liability insurance in place **(upon parties contracting)**
- 8.5 Bidder must adhere to Protection of Personal Information (POPI) Act.

## 9. ADJUDICATION USING A POINT SYSTEM

- 9.1** The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 9.2** Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 9.3** 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.
- 9.4** 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.
- 9.5** Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

## 10. 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

## 11. 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

- 11.1** 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.
- 11.2** 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.
- 11.3** 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.
- 11.4** 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.
- 11.5** 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. 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.

## **13. 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.



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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:**

- 13.1 Not evaluate and award RFQs that do not comply strictly with this RFQ document.
- 13.2 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.
- 13.3 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.
- 13.4 Award a contract to one or more bidder(s).
- 13.5 Accept any RFQ in part or full at its own discretion.
- 13.6 Cancel this RFQ or any part thereof at any time as prescribed in the PPPFA regulation.
- 13.7 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.

**14. 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), Bidders Disclosure (SBD 4),
- General Conditions of Contract (GCC)

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

