

REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A SERVICE PROVIDER FACILITATE THE IMPLEMENTATION OF STRATEGY IMPLEMENTATION & REVIEW WORKSHOP FOR INSETA AGAINST THE APPROVED INSETA APP

RFQ	REQ/INS/2022/01066
RFQ ISSUE DATE	15 SEPTEMBER 2022
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FACILITATE THE IMPLEMENTATION OF STRATEGY IMPLEMENTATION & REVIEW WORKSHOP FOR INSETA AGAINST THE APPROVED INSETA APP
CLOSING DATE & TIME	19 SEPTEMBER 2022 @ 11:00
LOCATION FOR SUBMISSIONS	rfqs@inseta.org.za

Bidders must submit responses via e-mail at: 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 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 Therefore, the INSETA is requiring a suitability qualified service provider for the appointment of a service provider facilitate the implementation of strategy implementation & review workshop for INSETA against the approved INSETA APP.

2. SCOPE OF WORK

- 2.1 Develop and implement an impactful bespoke 2-day workshop that will both inspire and inform.
- 2.2 Manage workshop logistics and communications.
- 2.3 Design a programme that will ensure excellent delegate engagement and robust conversation.
- 2.4 Programme must include well thought-out and appropriate topics to ensure dialogue.
- 2.5 Engage appropriate speakers that are subject matter experts on implementing strategy, including a renowned motivational speaker.
- 2.6 Provide facilitation services for sessions and breakaways.
- 2.7 Compile a report that details the sessions and outcomes.

3. CONTRACT DURATION

- 3.1 Once-off services for the **22nd to 24th September 2022.**

4. PREQUALIFICATION CRITERIA

- 4.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 4.2 Bidder must submit a fully of a completed and signed bidding documents:
 - 4.2.1 **Standard Bidding Document (SBD 4) Bidder's Disclosure.**
 - 4.2.2 **SBD 6.1 Preference Points Claim form**
 - 4.2.3 **General Conditions of Contract (GCC)**
- 4.3 Bidder must provide a valid BBBEE Certificate (**EME or QSE only, no Generic entities will be accepted**), accredited by **SANAS only**) or **BBBEE Certificate issued by CIPC**, or **valid Sworn Affidavit on the DTI issued template – BBBEE Contributor level 1 or Level 2.**

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

5. MANDATORY CRITERIA

- 5.1 The bidder must initial each page of the RFQ document.
- 5.2 The bidder must submit a quotation on a company letter.
- 5.3 Bidder must submit a minimum 2 reference letter (*signed, dated on client letterhead*) where bidder conducted facilitation of strategic planning workshops.

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

6. PRICE CONSIDERATION

- 6.1 Responses 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.

No	Item Description	Quantity	Price
1.	Strategic planning facilitation services as per scope of work	2 days	
		Sub-Total	
		Vat @ 15%	
		Total	

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 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 Act 5 of 2000.
- 7.4 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.
- 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 AND BBBEE 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

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

EMPOWERED TO **INFLUENCE** AND **INSPIRE!**

- 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 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.

9.4 Consortium

- 9.4.1. 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.
- 9.4.2. 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.
- 9.4.3. 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.
 - BBEE Sworn-Affidavit.
 - SBD 4
- 9.4.4. 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 BBEE status in order to align with the BBEE 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.
- 9.4.5. Of importance is that in a consortium, each individual team members retain their identities.

9.5 A joint venture

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

10. Unincorporated joint venture:

10.1 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) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBEE Certificate.

11. Incorporated joint venture

11.1 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) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBEE Certificate.

11.2 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.

11.3 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.

12. COMMUNICATION

12.1 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.**

13. 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:

- 13.1 Not evaluate and award a bid that do not comply strictly with this BID document.
- 13.2 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.
- 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 BID shall be sought, offered or permitted.
- 13.4 Cancel this BID at any time as prescribed in the PPPFA.
- 13.5 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the cost effectiveness and the principle of value for money not necessarily on the basis of the lowest costs.

14. Cost of Bidding

14.1 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.

15. Note to Bidders:

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

END OF TERMS OF REFERENCE DOCUMENT