

REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A FRAMEWORK OR PANEL CONTRACT TO PROVIDE QCTO ACCREDITED ASSESSMENT CENTRE VENUES TO HOST INSETA EXIT EXAMINATIONS AND PROVIDE INVIGILATION SERVICES. (for services as and when required)

RFQ ISSUE DATE	19 OCTOBER 2022
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A FRAMEWORK OR PANEL CONTRACT TO PROVIDE QCTO ACCREDITED ASSESSMENT CENTRE VENUES TO HOST INSETA EXIT EXAMINATIONS AND PROVIDE INVIGILATION (for services as and when required)
CLOSING DATE & TIME	25 OCTOBER 2022 @ 11h00
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 _____

APPOINTMENT OF A FRAMEWORK OR PANEL CONTRACT TO PROVIDE QCTO ACCREDITED ASSESSMENT CENTRE VENUES TO HOST INSETA EXIT EXAMINATIONS AND PROVIDE INVIGILATION (for services as and when required)

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 requires a suitably qualified service provider/s to provide QCTO accredited assessment centre venues to host Exit Examinations and provide invigilation services as and when required. Venues are required in Gauteng (Johannesburg) 100 learners, Western Cape (Cape Town) for 50 learners, KZN (Durban) for 50 learners, Mpumalanga (Witbank) for 20 learners, Limpopo for 20 learners, and Eastern Cape (East London for 30 learners and Port Elizabeth for 50 learners) - (for services and when required)
- 1.3** The centres must be accredited for all or any of the following qualifications:

SAQA ID Code	Qualification Title
91784	Occupational Certificate: Insurance Agent – Insurance Underwriter
117329	Occupational Certificate: Insurance Agent – Insurance Underwriter (REVIEWED)
99668	Occupational Certificate: Claims Administration – Claims Assessor
105026	Occupational Certificate: Financial Advisor
105030	Occupational Certificate: Health Care Benefits Advisor
105022	Occupational Certificate: Long-Term Insurance Advisor
105025	Occupational Certificate: Employee and Pension Fund Benefits Advisor
105021	Occupational Certificate: Investment Advisor
99574	Occupational Certificate: Professional Principal Executive Officer.

2. SCOPE OF WORK

Services required include the following: (for services and when required)

- 2.1 Provide suitably furnished assessment venues (classrooms) that can host a minimum of **20** candidates each per exam session.
- 2.2 Venues must be available at specified dates in April/May and April/September and November/December of each year during the 36 months contract period. A schedule of assessment dates will be communicated by INSETA and each exam sitting will be confirmed by INSETA.
- 2.3 An assessment venue for an examination session must provide **TWO (2)** trained Invigilators (per classroom) and **ONE (1)** Chief Invigilator for the centre. Proof of invigilator training in the form of i.e., training attendance register will be required once the venue booking is confirmed per session.
- 2.4 Provide safe overnight storage to keep assessment instruments (question papers and resources) for use during an examination session.
- 2.5 Facilitate courier and distribution of exam related documents or answer books to INSETA (Johannesburg) after every examination.
- 2.6 Provide invigilation related administrative services including completing invigilator reports, irregularity reports etc related to exams.

3. TIMEFRAMES

- 3.1 The duration of the contract will be for period of **three (3)** years from date of appointment – for services and when required.

4. CONTRACTUAL OBLIGATION

- 4.1 Bidders to fully complete pricing table or provide a quotation that attends to the elements listed in this RFQ **including all applicable costs (VAT)**
- 4.2 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.
- 4.3 Bidder will be expected to sign SBD 7.2 contract form upon award.
- 4.4 Bidder will be issued a PO on request of services as and when required
- 4.5 Bidder must remain compliant in terms of BBBEE compliance throughout the contract period.
- 4.6 Bidder must maintain a tax compliant status through the contract period for services as and when required.
- 4.7 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as application of regulatory and prescripts. Bidders are also required to take all reasonable steps

to protect information, in line with the provisions of the POPIA 4 of 2014.

5. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 5.1 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.
- 5.2 The Contract site is at **INSETA (as and when required)**.

6. WORKMEN AND SUPERVISION ON SITE

- 6.1 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.

7. PREQUALIFICATION CRITERIA

- 7.1 Proof of registration on CSD (**Central Supplier Database**)
- 7.2 Bidder must submit a **BBBEE Certificate accredited by SANAS only** or **Sworn Affidavit on an applicable DTI template or CIPC template (EME, QSE or GENERIC BBBEE 1 or 2 contributor)**.

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

8. MANDATORY CRITERIA

- 8.1. Bidder must provide a *valid* proof of QCTO accreditation for any or all listed qualification in section 3.
- 8.2. Bidder to provide a CVs of chief invigilator and trained invigilator indicating experience showing a minimum of 2 years relevant work experience in the field.

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

9. PRICING SCHEDULE

9.1 The bidder must ensure that the price quotations are inclusive of all applicable taxes (**including VAT**). Costing must comprise of all the relevant services proposed in the bidder's submission (but not limited to):

No.	Areas	Quotation -20 learners/venue - Year 1	Year 2	Year 3	Total (VAT.) Inc
1.	Gauteng				
2.	Western Cape				
3.	KZN				
4.	Mpumalanga				
5.	Limpopo				
6.	East London				
7.	Port Elizabeth (Gqeberha)				

Annual escalation of 5.5% over the contract term

9.2 Preference Evaluation

9.2.1. **BBBEE and Price**

As the tender **price is estimated to be between R30 000 and R50 million including VAT**, 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 basic taking into account all factors of non-firm prices.
- 10.3** 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.
- 10.4** 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.
- 10.5** Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

11. 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:

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

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

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 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.

12.4 Consortium

12.4.1. 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.

12.4.2. 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.

12.4.3. 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.
- BBBEE Sworn-Affidavit.
- SBD 4

12.4.4. 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 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.

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

12.5 A joint venture

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

12.6. Unincorporated joint venture:

12.6.1. 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.

12.7. Incorporated joint venture

12.7.1. 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.

12.7.2. 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.

12.7.3. 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.

13. COMMUNICATION

13.1 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/RFQ should be emailed **three days before the closing date** at rfqs@inseta.org.za

14. CONDITIONS TO BE OBSERVED WHEN BIDDING

14.1. 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 **60 days** from the closing date of the BID Enquiry.

INSETA reserves the right to:

- 14.2. Not evaluate and award a bid that do not comply strictly with this BID document.
- 14.3. 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.
- 14.4. 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.
- 14.5. Cancel this BID at any time as prescribed in the PPPFA.
- 14.6. 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.

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.

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

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

- SBD 4 (Bidders Disclosure)
- SBD 6.1
- General Conditions of Contract (GCC) initialled