

REQUEST FOR QUOTATION (RFQ)

PROVISION FOR PANEL OF PSYCHOMETRIC ASSESSMENT AND BACKGROUND CHECKS (AS AND WHEN REQUIRED) FOR A PERIOD OF 24 MONTHS

RFQ	REQ/INS/2022/01095
RFQ ISSUE DATE	13 JANUARY 2023
BRIEFING SESSION	N/A
RFQ DESCRIPTION	PROVISION FOR PANEL OF PSYCHOMETRIC ASSESSMENT AND BACKGROUND CHECKS (AS AND WHEN REQUIRED) FOR A PERIOD OF 24 MONTHS
CLOSING DATE & TIME	20 JANUARY 2023 @ 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: _____

Board Members: Mr. J.S. Ngubane (Chairperson), Ms. V. Pearson (Organised Employer), Ms. L. van der Merwe (Organised Employer), Ms. R.G. Govender (Organised Employer), Ms. P. Mendes (Organised Employer), Ms. Z. Motsa (Organised Employer), Mr. K.A.A. Sungay (Organised Employer), Mr. M. Soobramoney (Organised Labour), Mr. J.J.M. Mabena (Organised Labour), Ms. S.A. Anders (Organised Labour), Mr. C.B. Botha (Organised Labour), Ms. S.T. Dinyake (Organised Labour), Ms. N.B. Jonas (Organised Labour), Ms. F. Mabaso (Professional Bodies), Mr. S.M. Mpuru (Professional Bodies)

CEO: Ms. G. Mkhize

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 objective of this request is to appoint a professional and accredited service provider to conduct a psychometric assessments and background and checks of new INSETA candidates (as and when required) for a period 24 months.

2. SCOPE OF WORK

Bidders are required to provide a details methodology and aligned to clear turn-around times for the completion and submission of background checks (**maximum 48 hours**) including the recommendation report, and report on psychometric assessment (**maximum of 5 days**) including the assessment recommendation report.

2.1 Background and Screening Check must be in consisting of the following:

- 2.1.1 Qualification Verification
- 2.1.2 Criminal record checks – Fingerprint
- 2.1.3 Credit checks
- 2.1.4 Previous employment history and reference checks
- 2.1.5 Identity checks

2.2 Psychometric assessments must be in consisting of the following:

- 2.2.1 Fifteen Factor Personality Questionnaire (15FQ)
- 2.2.2 Work-related Risk and Integrity Scale (WRISc)
- 2.2.3 Cognitive Process Profile (CPP)
- 2.2.4 Emotional Quotient Inventory 2.0 (EQ-I 2.0)
- 2.2.5 Measuring emotional intelligence

2.3 General Assessment must consist of the following.

- 2.3.1 integrity
- 2.3.2 problem solving
- 2.3.3 resilience and drive
- 2.3.4 innovation and resourcefulness
- 2.3.5 empowering self and others
- 2.3.6 leadership skills

3. CONTRACT DURATION

- 3.1 The project duration is for a period of 24 months, **effective from 1 April 2023.**

4. EVALUATIONS PREQUALIFICATION CRITERIA (Phase 1)

- 4.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 4.2 Bidder must submit fully completed and signed bid 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 Signed **Request for Quotation (RFQ)** form.
- 4.3 **General Conditions of Contract (GCC)** initialled on each page.
- 4.4 Bidder must provide a valid BBBEE Certificate (**EME or QSE**), for **Level 1 or Level 2 BBBEE contributor (no generic companies will be considered)**, accredited by **SANAS only** or BBBEE Certificate issued by CIPC, or valid Sworn Affidavit on the DTI issued template. **Note: All bidders who do not comply with this element will be disqualified.**

5. MANDATORY CRITERIA (Phase 2)

- 5.1 Bidder must provide proof of experience in undertaking this scope Background checks and Psychometric assessments and of work in at least three different companies with contactable references. Bidder to provide a list of a minimum of 3 references. Reference Letters must not be older than five years.

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

6 PRICE CONSIDERATION (Phase 3)

- 6.1 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.
- 6.2 Quotation on company letterhead aligned the items listed below:

No.	Description (as per scope of work)	Rates per services (Per Candidate per service)
1	Backgrounds checks including reports	
	Qualification Verification	
	Criminal record checks – Fingerprint	
	Credit checks	
	Previous employment history and reference checks	
	Identity checks	
2	Psychometric assessments including reports	
	Fifteen Factor Personality Questionnaire (15FQ)	
	Work-related Risk and Integrity Scale (WRISc)	
	Cognitive Process Profile (CPP)	
	Emotional Quotient Inventory 2.0 (EQ-I 2.0)	
	Measuring emotional intelligence	

7 CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 7.1 The contract will be capped **R1 000 000,00 including VAT** for services required on an as when required basis.
- 7.2 Signatory to SBD 7.2 contract form with the bidders approved submission as annexure to the contract.
- 7.3 For each service required the bidder will be required to accept a purchase order.
- 7.4 Compliance with the general conditions of contract.
- 7.5 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.
- 7.6 The successful bidder will be required to have adequate professional indemnity as well liability insurance in place (**upon parties contracting**).
- 7.7 **Bidder must adhere to Protection of Personal Information (POPI) Act.**

8 ADJUDICATION USING A POINT SYSTEM

- 8.1** The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 8.2** Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 8.3** 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.
- 8.4** 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.
- 8.5** Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

9 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

10 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

- 10.1** 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.
- 10.2** 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.
- 10.3** 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.
- 10.4 Consortium**
- 10.4.1 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.
- 10.4.2 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 delineates the rights and obligations of each member.
- 10.4.3 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

10.4.4 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.

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

10.5 A joint venture

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

10.6 Unincorporated joint venture:

10.6.1 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.



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- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

10.7 Incorporated joint venture

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

10.8 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.

10.9 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.

11 COMMUNICATION

11.1 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.**

12 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:

- 12.1 Not evaluate and award a bid that do not comply strictly with this BID document.
- 12.2 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.
- 12.3 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.
- 12.4 Cancel this BID at any time as prescribed in the PPPFA.
- 12.5 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.

13 COST OF BIDDING

- 13.1 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.

14 NOTE TO BIDDERS:

- 14.1 Due diligence to be conducted by INSETA prior to the award of the contract – where applicable

END OF DOCUMENT