

ADDEMDUM
REQUEST FOR QUOTATION (RFQ)

**COACHING AND MENTORING SERVICES FOR INSETA FIVE (5) EXECUTIVES AND
TWELVE (12) MANAGERS**

RFQ	REQ/INS/2022/01086
RFQ ISSUE DATE	13 JANUARY 2023
BRIEFING SESSION	N/A
RFQ DESCRIPTION	COACHING AND MENTORING SERVICES FOR INSETA FIVE (5) EXECUTIVES AND TWELVE (12) MANAGERS
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: _____

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) therefore seeks to appoint a competent, experienced and accredited service provider to offer coaching and mentoring services for INSETA Five (5) Executives and Twelve (12) Managers over a period of 12 months, on an as and when required basis.

2. SCOPE OF WORK

The INSETA has identified a need for one-on-one Executive and Management coaching and mentoring services to be provided to INSETA. The objective is to enrich learning and development, to enhance INSETA's leadership impact and effectiveness to drive organizational culture and business performance.

2.1 Coaching and mentoring sessions/service must include the following:

- 2.1.1 Executive and Management coaching and mentoring sessions will consist of One-on-One sessions and group/alignment sessions where required.
- 2.1.2 Coaching and mentoring sessions will be conducted monthly over a period of twelve months and each session to be One to Two hours long.
- 2.1.3 The service provider must conduct initial psychometric assessments and profiling to identify the developmental areas on which the coaching will be based on.
- 2.1.4 Executives and Managers will receive an individual written report on the outcome of the assessment.
- 2.1.5 Guide & support Executives and Managers in developing a personalised development plan.
- 2.1.6 Develop the coaching and mentoring plan for INSETA with at least eight (8) to twelve (12) coaching sessions per individual.
- 2.1.7 Monthly reporting on the progress made regarding the coaching and coaching outcomes.
- 2.1.8 Provide high level report to the CEO when required on the overall impact of the coaching and mentoring services; and
- 2.1.9 A final close-out report to the CEO with recommendations at the end of the coaching and mentoring programme.

3. PROJECT OUTCOME AND DELIVERABLES

INSETA expects the coaching and mentoring services must amongst others lead to the following outcomes:

- 3.1 Increased personal awareness of own strengths, weaknesses and ability to leverage on the strengths.
- 3.2 Significant personal growth and ability to motivate employees to perform optimally.
- 3.3 Provide personal and professional tools to strengthen one's effectiveness as a leader.
- 3.4 Equip Executives and Managers with tools and techniques to create a positive and innovative organisational culture.
- 3.5 Increased sense of emotional Intelligence in relation to thought control and mood management when taking leadership roles within teams and between teams.
- 3.6 Conflict Management.
- 3.7 Transformational, Courageous and Ethical leadership.
- 3.8 Agility

4. CONTRACT DURATION

- 4.1 The project duration is for a period of twelve (12) months.

5. EVALUATIONS

PREQUALIFICATION CRITERIA (Phase 1)

- 5.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 5.2 Signed **Request for Quotation (RFQ)** form.
- 5.3 **Quotation** on company letterhead.
- 5.4 Bidder must submit fully completed and signed bidding documents:
 - 5.2.1 **Standard Bidding Document (SBD 4) Bidder's Disclosure.**
 - 5.2.2 **SBD 6.1 Preference Points Claim form.**
- 5.5 **General Conditions of Contract (GCC)** initialled on each page.
- 5.6 Bidder must provide a valid BBEE Certificate (**EME or QSE**), **for Level 1 or Level 2 BBEE contributor (no generic companies will be considered)**, accredited by SANAS only) or BBEE Certificate issued by CIPC, or valid Sworn Affidavit on the DTI issued template. **Note: All bidders who do not comply with the items listed above will be disqualified.**

6. MANDATORY CRITERIA (Phase 2)

6.1 Project methodology and project plan

The Service Provider must provide the detailed methodology and approach on how the required services will be provided to INSETA. The methodology and approach must be aligned to the scope of requirements

- 6.1.1. Assessments including pre-coaching needs analysis, data gathering and planning.
- 6.1.2. Goal setting, development of a coaching plan and contracting with the individual.
- 6.1.3. Implementation of the coaching plan through coaching sessions focused on specific competencies or areas identified.
- 6.1.4. Measurement and Reporting on the results against the plan;
- 6.1.5. Project management, and Information Management.

6.2 Reference letters

- 6.2.1. Three (3) reference letters indicating *conducting of successful completion of mentoring and coaching* projects experience within the last five (5) years. *Reference letters must be dated, signed and be in the referring company's letterhead.*

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

7. PRICE CONSIDERATION (Phase 3)

7.1 Service providers must consider the following for price quotations and must be inclusive of all applicable taxes (including VAT):

- 7.1.1. It is anticipated that the executive coaching programme will include a minimum of one (1) contact session every 3 – 6 weeks (ideally monthly), consisting of 1 – 2 hours each, over a period of 12 months. **A minimum of 8 sessions and a maximum of 12 sessions.**
- 7.1.2. Costing must comprise amount per:
 - i. Assessments including pre-coaching needs analysis, data gathering and planning
 - ii. Coaching sessions
 - iii. Coaching Individual development plan
 - iv. Team Coaching as and when required
 - v. Reporting

6 CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 6.1 Bidders pricing must include all applicable costs i.e. including VAT, escalations and discounts etc where applicable.
- 6.2 Signatory to SBD 7.2 contract form with the bidder's approved submission as an annexure to the contract.
- 6.3 For each service required the bidder will be required to accept a purchase order.
- 6.4 Compliance with the general conditions of contract.
- 6.5 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.
- 6.6 **Bidder must adhere to Protection of Personal Information (POPI) Act.**

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 respects, the award shall be decided by the drawing of lots.

8 POINTS AWARDED FOR PRICE AND BBEE 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

- 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.

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

- 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.
 - BBBEE 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 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.

- 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.

9.6 Unincorporated joint venture:

- 9.6.1 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 BBBEE Certificate.

9.7 Incorporated joint venture

- 9.7.1 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.

- 9.8 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.
- 9.9 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.

10 COMMUNICATION

- 10.1 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**.

11 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:

- 11.1 Not evaluate and award a bid that do not comply strictly with this BID document.
- 11.2 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.
- 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 BID shall be sought, offered or permitted.
- 11.4 Cancel this BID at any time as prescribed in the PPPFA.
- 11.5 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.

12 COST OF BIDDING

- 12.1 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.

13 NOTE TO BIDDERS:

13.1 Due diligence to be conducted by INSETA prior to the award of the contract – where applicable)

END OF DOCUMENT

