

REQUEST FOR QUOTATION (RFQ)

PANEL OR FRAMEWORK OF SERVICE PROVIDERS: APPOINTMENT OF A SERVICE PROVIDER/S TO DEVELOP INSTRUMENTS & TOOLS (QUESTION PAPERS & MEMOS) FOR IMPLEMENTATION OF EXTERNAL INTERGRATED SUMMATIVE ASSESSMENTS (EISA) EXAMINATIONS FOR REGISTERED OCCUPATIONAL QUALIFICATIONS.

RFQ ISSUE DATE	21 FEBRUARY 2023
BRIEFING SESSION	N/A
RFQ DESCRIPTION	PANEL OR FRAMEWORK OF SERVICE PROVIDERS: APPOINTMENT OF A SERVICE PROVIDER/S TO DEVELOP INSTRUMENTS & TOOLS (QUESTION PAPERS & MEMOS) FOR IMPLEMENTATION OF EXTERNAL INTERGRATED SUMMATIVE ASSESSMENTS (EISA) EXAMINATIONS FOR REGISTERED OCCUPATIONAL QUALIFICATIONS.
CLOSING DATE & TIME	28 FEBRUARY 2023 @ 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 _____

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 Quality Council for Trades and Occupations (QCTO) is a regulated body that quality assures the provision of Occupations Qualifications (OQs) in South Africa. The INSETA/QCTO Service Level Agreement (SLA) signed in December 2020 mandates INSETA as a QCTO delegated Development Quality Partners (DQP) as well as an Assessment Quality Partner (AQP) to among other:
- 1.2.1. Develop, review and implement the roll-out of Occupation Qualifications for implementations by delegated bodies.
 - 1.2.2. Manage the implementation of External Integrated Summative Assessments (EISA) examinations for OQs.
 - 1.2.3. Recommend Skills Development Providers (SDPs) as well as suitable Assessment Centres to host EISA examinations.

2. PROJECT OBJECTIVE

- 2.1** The objective of the project is to enable INSETA to fully implement Occupations Qualifications in-line with its mandate as a QCTO delegated AQP. The SME will be contracted to provide the following services:
- 2.2** Develop banks of 10 x unique EISA ready examination instruments/tools for each or any of the Nine (9) registered OQs – see list below.

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.
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NB: post development, SME must prepare development reports and moderations reports for each or any of the 10 question/model answer papers in the bank.

- 2.3.** Therefore, INSETA wishes to appoint a service provider to develop EISA ready examination instruments and tools for Nine (9) registered OQs and provide development reports related to instrument development and moderation processes.
- 2.4.** Appoint Subject Matter Experts (SMEs) to develop banks of examination ready question papers and model answers in line with the associated OQ blueprint for each qualification. INSETA will provide to the SME the related blueprint for each qualification.

3. SCOPE OF WORK

Development of Banks of EISA Instruments/Tools for each or any of the (9) OQs:

- 3.1** Develop a bank of 10 x unique EISA ready instruments (question papers) for each or any the listed OQs.
- 3.2** Develop a bank of 10 x unique EISA ready tools (model answers) for each or any of the OQs listed above.
- 3.3** The instruments/tools must comply with the Qualification Assessment Specification (QAS Addendum) for each OQ. The QAS addendum is a blueprint used to develop instruments for each OQ. *The QAS addendum will be provided by INSETA to the selected SME(s).*
- 3.4** The SME must submit to INSETA a project plan highlighting timeline. INSETA envisages that the upcoming of EISA exams will be at the end of November 2022
- 3.5** The SME must also be prepared to sign an INSETA confidentiality agreement. *The confidentiality agreement will be provided by INSETA to the selected SME(s).*

4. DELIVERIES

As and when required, related to the development of instruments & tools, the service provider must:

- 4.1** Deliver to INSETA 10 x unique EISA ready EISA examination instruments and tools for each OQ.
- 4.2** The service provider must submit to INSETA signed development reports for each question paper/answer set.
- 4.3** The service provider must submit to INSETA a development project plan highlighting deadline.

5. KEY PERFORMANCE INDICATORS

Key Responsibilities	Activities	Results Indicators (Including all applicable evidence to substantiate against all key responsibilities)
Submit profiles of EISA instrument developer(s) for each paper & OQ.	Recruit experts with experience on assessment instruments development who will develop the instruments for each OQ.	Profiles (CVs), ID Copies, appointment letter of Developers and signed INSETA non-disclosure agreement.
Submit profiles of EISA instrument moderator(s) for each paper & OQ.	Recruit experts that will moderate the instruments for quality, correctness, and suitability for each OQ.	Profiles (CVs), ID Copies, appointment letter of Moderators and signed INSETA non-disclosure agreement.
Develop and moderate 10 or any unique instruments per OQ.	Develop, moderate, and submit final instruments/tools per INSETA OQ prioritisation and timelines.	EISA bank approved by INSETA
Submit to INSETA instrument reports for each paper/ OQ developed and moderated.		Development reports signed by developer and moderator.

6. TIMEFRAMES

6.1 The duration of the contract will be for period of **two (2)** years from date of appointment.

7. CONTRACTUAL OBLIGATION

- 7.1 Bidders to fully complete pricing table or provide a quotation that attends to the elements listed in this RFQ **including all applicable costs (VAT)**
- 7.2 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.
- 7.3 Bidder will be expected to sign SBD 7.2 contract form upon award.
- 7.4 Bidder will be issued a PO on request of services as and when required
- 7.5 Bidder must remain compliant in terms of BBBEE compliance throughout the contract period.
- 7.6 Bidder must maintain a tax compliant status through the contract period for services as and when required.
- 7.7 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.

8. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 8.1 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.
- 8.2 The Contract site is at **INSETA (as and when required)**.

9. WORKMEN AND SUPERVISION ON SITE

- 9.1 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.

10. PREQUALIFICATION CRITERIA

- 10.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 10.2 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.**
- 10.3 **General Conditions of Contract (GCC)** initialled on each page.

11. MANDATORY CRITERIA

11.1 Bidders must provide CVs of subject matter experts with 5 years relevant experience in learning materials development or assessment instruments development.

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

12. PRICING SCHEDULE

12.1 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):

Unit Standard	Occupational Qualification	Quotation (Incl. Developer & Moderator Report)	Total (VAT. Inc)
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.		

12.2 Preference Evaluation

12.2.1. 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.

13. ADJUDICATION USING A POINT SYSTEM

- 13.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 13.2 Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 13.3 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.
- 13.4 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.
- 13.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

14. POINTS AWARDED FOR PRICE AND 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

Pt	=	Comparative price of bid under consideration
Pmin	=	Comparative price of lowest acceptable bid

15. SPECIFIC GOALS POINTS WILL BE AWARDED AS FOLLOWS:

Table 1: Specific goals for this bid and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprise with ownership 100% black owned-: Ownership	10	20		
Enterprise with ownership 80% and above black owned-: Ownership	10	20		
Enterprise with ownership 51% to 79% black owned-: Ownership	9	18		
Enterprise with ownership 51% women -: Ownership	9	18		
Enterprise with ownership 50% black owned-: Ownership	4	12		

Note: Evidence to be submitted by Emerging Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) – sworn affidavit (DTI or CIPC Template, Generic entities – SANAS accreditation.

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



- 15.1** Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 15.2** The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

16. Consortium

- 16.1.** 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.
- 16.2.** 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.
- 16.3.** 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



16.4. 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 specific goals 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.

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

17. A joint venture

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

17.1.1. Unincorporated joint venture:

17.1.1.1 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.

17.1.2. Incorporated joint venture

17.1.2.1. 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.

18. COMMUNICATION

18.1. 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.**

19. 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:

- 19.1.** Not evaluate and award a bid that do not comply strictly with this BID document.
- 19.2.** 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.
- 19.3.** 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.
- 19.4.** Cancel this BID at any time as prescribed in the PPPFA.
- 19.5.** 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.

20. COST OF BIDDING

20.1. 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.

21. NOTE TO BIDDERS:

21.1. Due diligence to be conducted by INSETA prior to the award of the contract – where applicable.

END OF DOCUMENT



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