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## **EXPRESSION OF INTEREST (EOI) FOR APPOINTMENT OF A PROJECT MANAGEMENT SERVICE PROVIDER FOR THE INSURANCE SECTOR STUDENT FUND (ISSF) SERVICE TO INSETA FOR A PERIOD OF 36 MONTHS**

The Insurance Sector Education and Training Authority (INSETA) invites suitable service providers to submit an Expression of Interest (EOI) to project manage the Insurance Sector Student Fund (ISSF) project.

The Insurance Sector Student Fund (ISSF) is a co-funded bursary scheme that aims to cater for the entire insurance value chain. The ISSF is co-funded by business entities in both private and the public sector with the intention to skill, upskill, reskill and multi skill student graduates and workers across a variety of economic sectors.

The invitation to submit EOI will be open on the 26 May 2023 and closes on the 15 June 2023 and must be submitted via email to [ISSFEOI@inseta.org.za](mailto:ISSFEOI@inseta.org.za) – **All submissions forwarded later than 16H00 on the 15 June 2023 will not be considered.**

### **Please Note:**

1. All EOIs forwarded must be in PDF Format and forwarded to the correct email address [ISSFEOI@inseta.org.za](mailto:ISSFEOI@inseta.org.za) **NB: No EOIs forwarded to any other INSETA email address will be considered.**
2. No Hand delivered/Hard Copy copies of EOIs will be accepted.
3. All submissions must comply with all submission requirements stated in the Summary of Application.
4. All submissions that are found to have a misrepresentation of information will not be considered.
5. All EOIs should contain sufficient information to allow the INSETA to make a fair determination on awarding/not awarding funds.
6. Collaborations with Private Sector and Public Higher Education Institutions in submission of EOIs are encouraged due to INSETA's mandate to link the Private Sector with Public Higher Education Institutions.
7. **This EOI is subject to a compulsory briefing session which will be held at INSETA offices at 18 Fricker Road, Illovo, Sandton, 2194 on 08 June 2023 at 10h00 – 12h00**

Complete the attached EOI form and attach all required documents as per Summary of Application (Only an authorised person must sign off before the form is submitted).

Submission of required documents must be directed to INSETA and addressed to Ms Serurubele Mutinhima.

All enquiries may be addressed to Ms Serurubele Mutinhima at email address [SerurubeleM@inseta.org.za](mailto:SerurubeleM@inseta.org.za) (011) 381-8900.

## SUMMARY OF APPLICATION

Definition:	The INSETA is requiring a suitably qualified Project Management Service Provider in learning programmes to manage the Insurance Sector Student Fund (ISSF) for a period of 36 months.
Contract Period:	The duration of the contract will be for the period of 36 months.
Eligibility criteria and Important Components to be included in an EOI:	<p>The Lead Project Manager must provide the INSETA with the following qualifications and experience:</p> <ol style="list-style-type: none"> <li>1. Proof of valid certification with at least one of but not limited to the following: <ol style="list-style-type: none"> <li>1.1 Project Management Professional (PMP) or</li> <li>1.2 Certified Project Management Practitioner (CPMP) or</li> <li>1.3 PRINCE 2 Foundation or PRINCE 2 Practitioner or</li> <li>1.4 PMBOK, Professional in Project Management (PPM) or</li> <li>1.5 Certified Project Manager (CPM) Certified associate in project management (CAPM) or</li> <li>1.6 Associate in project management (APM) or</li> <li>1.7 Master's in project management (MPM) or</li> <li>1.8 Any Post graduate qualification in Project Management.</li> </ol> </li> </ol> <p>Methodology and Proposed project execution plan which demonstrate a thorough understanding of Project Management services and highlight all key elements demonstrating the plan to deliver and implement on the project including timelines, resources to the task or role, support required to this project as well as reporting requirements reflecting the objectives measurable, milestone linked to the deliverables in line with the scope of work presented indicating compliance with section four (4) of the terms of reference on the delivery of the ISSF Project =</p> <p>(1) Initiation</p> <ol style="list-style-type: none"> <li>1.1 The Service Provider must provide a business case and process of managing the ISSF Project (SETA environment/ Public sector).</li> <li>1.2 Providing a detailed description of how the appointed Project management service provider will maintain this project for the agreed period.</li> </ol> <p>(2) Implementation</p> <ol style="list-style-type: none"> <li>2.1 The Service Provider must provide a suitable methodology for evaluating the application of the diverse strategic partners using any available platform (system) that can be migrated to the INSETA Management Information System (MIS) for reviewing and approving the ISSF fund applications.</li> <li>2.2 The Service Provider must keep all records and supporting documents in line with INSETA's technical indicators or guidelines, both digital and physical, with adherence to POPIA 2014.</li> <li>2.3 The Service Provider must provide INSETA with the marketing and communication plans for ISSF which include marketing materials, career exhibitions across the country.</li> <li>2.4 The Service Provider is expected to implement and review ISSF bursary policy and procedure. The Service Provider need to check the accuracy of the variables for effective implementation of project as per below:</li> </ol>

- a) The legitimacy of the contributing company; the size of the company; the number of the included applying students/employees; the proposed employer commitment; and the Grand Total (Employer Proposed Commitment and INSETA Proposed Commitment) on their Online Platform.

2.3.1 It must be in accordance with the rules of minimum co-funding percentages and categories as indicated below:

- a) Micro business (1-9 employees) minimum 25% co-funding.
- b) Small business (10-49 employees) minimum 25% co-funding.
- c) Medium businesses (50-149 employees) minimum 50% co-funding.
- d) Large and macro business (150+ employees) minimum 50% co-funding.

### (3) Planning, Deliverables and Milestone

3.1 The Service Provider must advertise, test the compliance of the bursary applications received.

3.2 The Service Provider will have a responsibility for delineating, modifying and amending the duties and tasks of two constituted INSETA internal committees i.e. The Insurance Sector Student Fund Project Review and Evaluation Committee (PREC) and the Insurance Sector Student Project Verification and Adjudication Committee (PVAC).

3.3 The Service Provider must provide multiple methodologies for reviewing and evaluating the diverse bursary applications received from the various stakeholders but not limited to;

3.3.1 Strategic Partners which includes public and private educational institutions, public and private entities, regulatory bodies, and any SETA including dependents of INSETA employees.

3.3.2 Private sector providers which include private sector implementation partners.

3.3.3 Co-funders (employers) in the insurance and related service sector, cross sectoral employers, organised labour, professional bodies, trade associations.

3.3.4 Public is any South African Citizen (unemployed and employed) who make direct individual application to the fund.

### (4) Project Report

4.1 The Service Provider must submit reports on the application process (accepted and rejected applicants) of ISSF fund applications to the Executive Management of INSETA upon agreed time frames, in a format that may be prescribed by INSETA.

4.2 The Service Provider must submit a database of all learners which will be migrated to the INSETA Management Information System (MIS).

4.3 The Service Provider must demonstrate the ability to recommend and implement a system that will detect and track double counting in the ISSF as well as in the INSETA conventional busy programme.

4.4 The Service Provider must provide a monthly report to Sector Education and Training Management (SETMIS), Quarterly Performance Report (QPR) and the Finance Committee, taking full control of this processes with the assistance of INSETA ISSF resources, the ISSF (PREC) and (PVAC) INSETA and the appointed external project management service provider.

4.5 The Service Provider must create and maintain a commitment register.

	<p>4.6 The Service Provider must provide Auditor-General, Internal Audit and Department of Higher Education and Training (DHET) with the learner portfolio of evidence (POE).</p> <p>(5) Project closure report</p> <p>5.1 The Service Provider must submit a quarterly and annual project report with progress and recommendations made.</p> <p>5.2 The Service Provider must submit an overall closure report for the duration of the project.</p> <p><b>The EOI must be submitted with the following:</b></p> <p>The CV's of at-least three (3) Project management resources reflecting capability and track record with number of years, in providing project management services, and have extensive experience in the project management field.</p> <p>Proof of reference signed reference letters on client's letterhead, dated with contactable references active client email address from previous and or current clients confirming that the Service Provider has successfully completed implementation bursary allocations and distribution in related projects for any SETA and or Public Higher Education Institution.</p> <p>Letters must not be older than 5 years rendering similar services in the SETA and Public Sector.</p>
Programme Duration:	The duration of the contract will be for period of 36 Months.
Contract Amount:	Determined by EOI and Evaluation by the INSETA Pricing
Contract Scope/ Funding Covers:	Determined by EOI and Evaluation by the INSETA
Administration Submission to be attached to the EOI:	<ul style="list-style-type: none"> <li>- Tax Certificate</li> <li>- Proof of Bank Account Letter</li> <li>- CSD Registration</li> <li>- Company Registration</li> <li>- BBBE Affidavit or Certificate</li> <li>- Letter of Authorisation (stating details of Authorised Signatory for contracting)</li> </ul>
In Scope	<ul style="list-style-type: none"> <li>- Innovative EOI aligned to INSETA's Annual Performance Targets and Sector Skills Plan.</li> </ul>
Submission to:	<a href="mailto:ISSFEOI@inseta.org.za">ISSFEOI@inseta.org.za</a>
Enquiries	<a href="mailto:serurubelem@inseta.org.za">serurubelem@inseta.org.za</a> (011) 381-8900