

REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A SERVICE PROVIDER FACILITATE THE STRATEGIC PLANNING PROCESS OF INSETA FOR MANAGEMENT, EXECUTIVE AND THE BOARD

RFQ	RFQ/INS/2023/24/0036
RFQ ISSUE DATE	11 JULY 2023
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FACILITATE THE STRATEGIC PLANNING PROCESS OF INSETA FOR MANAGEMENT, EXECUTIVE AND THE BOARD
CLOSING DATE & TIME	17 JULY 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 Therefore, the INSETA is requiring a suitability qualified service provider for the appointment of a Service Provider to facilitate the planning workshops for Management, Executives, and the Board in preparation for the Strategic Plan and Annual Performance Plan 2024/2025.

2 DETAILED SPECIFICATION

- 2.1 The INSETA seeks the services of the Strategic Planning Facilitator for the:

Session type	Date	Venue	No. of days
Extended Executive Management Planning Session	3 August 2023	TBC	1 day
Executive Management Strategic Planning Session	8 August 2023	TBC	1 day
Board Strategic Planning Session	17 August 2023	TBC	1 day
Staff Strategy Implementation Session	11 - 13 October 2023	Sun City	3 days

3 DELIVERABLES AND PROJECT TIME FRAMES

- 3.1 The bidder must provide a methodology in full compliance to the scope work and project plan with the reference to the below mentioned timelines (subject to confirmation upon appointment by INSETA):
- 3.1.1 Conduct briefing sessions in preparation of the Strategic Planning sessions with the INSETA Executives, bidder to set aside time for planning (Virtual and or face to face) for each session.
- 3.1.2 Peruse documentation relevant to the assignment in preparation for the Strategic Planning session.
- 3.1.3 Study the achievements, constraints and challenges facing the INSETA in the last few years.
- 3.1.4 Write preliminary report on the strategic planning session for discussion with Executive Management and inputs from the Board.
- 3.1.5 Draft, develop and submit the strategic plan and annual performance plan to INSETA,

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and make provision for a minimum of 5 drafts prior to finalisation and approval by INSETA.

- 3.1.6 Develop and implement an impactful bespoke workshops that will both inspire and inform.
- 3.1.7 Manage workshop logistics and communications.
- 3.1.8 Provide facilitation services for sessions and breakaways.
- 3.1.9 Design a programmes that will ensure excellent delegate engagement and robust conversation.
- 3.1.10 Programmes must include well thought-out and appropriate topics to ensure dialogue.
- 3.1.11 Engage appropriate speakers that are subject matter experts on implementing strategy, including a renowned motivational speaker.
- 3.1.12 Compile reports that detail the sessions and outcomes.
- 3.1.13 Prepare a consolidated and close out final report on the strategic planning sessions as a reflection of the proceedings including action plan and recommendations.
- 3.1.14 Incorporate the Excellence Model into the planning and implementation sessions respectively.

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)** initialed on each page.

5 MANDATORY CRITERIA (Phase 2)

The prospective service provider is expected to provide the following with the submissions:

- 5.1 The bidder must submit a minimum of three (3) reference letters must reflect the experience in providing strategic planning sessions and development of the Strategic Plan and Annual Performance Plan. The letters must have a contactable references (Email or telephone contact) reference letters must be signed, dated and must be on the Company letterhead.

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



6 PRICE CONSIDERATION (Phase 3)

PRICING SCHEDULE

- 6.1 Service provider must ensure that the price quotations are inclusive of all applicable taxes **(Including VAT)**. Costing must comprise all the relevant services proposed in the bidder submission.
- 6.2 RQuotation on company letterhead aligned the items listed below:

Activities as per the deliverables and scope work as detailed in this RFQ document				
No.	Description	Rate Per day	Quantity	Tootal cost
2.	Facilitation of the Extended Management Strategic Session <i>(Virtual and face to face)</i>	R	1 day	R
3.	Facilitation of the Executive Management Strategic Session <i>(Virtual and face to face)</i>	R	1 day	R
4.	Facilitation of the Board Strategic Session <i>(Virtual and face to face)</i>	R	1 day	R
5.	Facilitation of the Staff Strategic Session <i>(Virtual and face to face)</i>	R	3 days	R
6.	Draft (professional writing, editing and proof reading before final submission to INSETA), develop and submit the strategic plan and annual performance plan to INSETA, and make provision for a minimum of 5 drafts prior to finalisation and approval by INSETA.			R
7.	Preparation of the consolidated and closeout report.			R
	Sub-Total			R
	Vat			R
	Total			R

7 ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 7.1 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.
- 7.2 The Contract site is at INSETA (as and when required).



8 WORKMEN AND SUPERVISION ON SITE

- 8.1 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.

9 CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 9.1 Signatory to SBD 7.2 contract form with the bidders approved submission as annexure to the contract.
- 9.2 For each service required the bidder will be required to accept a purchase order.
- 9.3 Compliance with the general conditions of contract.
- 9.4 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
- 9.5 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.
- 9.6 The successful bidder will be required to have adequate professional indemnity as well liability insurance in place (**upon parties contracting**).
- 9.7 **Bidder must adhere to Protection of Personal Information (POPI) Act.**

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 basis 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

- (1) The following formula will be used to calculate the points out of 80 for price in respect of an invitation for a tender with a Rand value equal to or below R50 million, inclusive of all applicable taxes:

$$Ps = 80 \{1 - (Pt - P \text{ min})\}$$

P min

Where:

Ps = Points scored for comparative price of bid under Consideration

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

- (2) A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender.
- (3) The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.
- (4) Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

12 SPECIFIC GOALS POINTS WILL BE WARDED 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 of 80-100% black owned -: Ownership	10	20		
Enterprise with ownership of 80-100% women owned -: Ownership	10	20		
Enterprise with ownership of 50-79% black owned -: Ownership	9	18		
Enterprise with ownership 50-79% women owned -: Ownership	9	18		
Enterprise with ownership of less than 50% black owned or women owned -: Ownership	6	14		

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.

- 12.1 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.
- 12.2 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated

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or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

- 12.3 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.
- 12.4 Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate and BBBEE Scorecard, substantiating their B-BBEE rating and black ownership issued by SANAS.
- 12.5 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.

12.6 Consortium

- 12.6.1 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.
- 12.6.2 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.
- 12.6.3 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:

- **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)
- **Partner**
 - Proof of CSD registration.
 - Tax Pin.
 - BBBEE Sworn-Affidavit.
 - SBD 4

12.6.4 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.

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

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12.7 A joint venture

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

12.8 Unincorporated joint venture:

12.8.1 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

- SBD 4
- SBD 6
- Tax pin
- CSD registration.
- The JV agreement will direct which bank account of the two entities will be used.
- Consolidated Joint BBBEE Certificate.

12.9 Incorporated joint venture

12.9.1 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

- SBD 4
- SBD 6
- Tax pin
- CSD registration.
- The JV agreement will direct which bank account of the two entities will be used.
- Consolidated Joint BBBEE Certificate.

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 should be emailed **three days before the closing date**.

14 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.

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INSETA reserves the right to:

- 14.1 Not evaluate and award a bid that do not comply strictly with this BID document.
- 14.2 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.
- 14.3 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.
- 14.4 Cancel this BID at any time as prescribed in the PPPFA.
- 14.5 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the cost effectiveness and the principal 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 – where applicable.

END OF DOCUMENT