

REQUEST FOR QUOTATION (RFQ)

PROVISION OF TRAINING ON POLICY DEVELOPMENT, IMPLEMENTATION AND EVALUATION

RFQ	RFQ/INS/2023/24/0054
RFQ ISSUE DATE	10 October 2023
BRIEFING SESSION	N/A
RFQ DESCRIPTION	PROVISION OF TRAINING ON POLICY DEVELOPMENT, IMPLEMENTATION AND EVALUATION
CLOSING DATE & TIME	13 October 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 INSETA seeks to procure services for training on policy development, implementation and evaluation for the INSETA Board.

2 DETAILED SCOPE OF WORK

The course should cover the following areas:

- 2.1 To gain knowledge and understanding on the end-to-end policy process, from identification to outcome.
- 2.2 Understanding the relationship and inter-dependence between policy and strategy
- 2.3 Typical process of policy development.
- 2.4 The boards role in policy development, implementation and evaluation process.
- 2.5 Prepare board members for multiple challenges that they may encounter during the process, with both internal and external influence, such that they can pre-empt these and not allow these to affect the policy and the resultant benefits to the organisation and its employees.
- 2.6 The political-managerial interface dynamics of a strategic approach to policy formulation and implementation
- 2.7 Perform a situation analysis to determine actual needs for service delivery.
- 2.8 Select alternative strategies to implement public policies.
- 2.9 Cascade the strategy formulation process down to tactical and operational institutional levels.

2.10 Duration of the course: Maximum of 10 Weeks

2.11 Deliverables

- 2.11.1 This course should have elements of an assignment/ examination/POE.
- 2.11.2 After completion the training provider must issue certificates.
- 2.11.3 The course must be accredited.

3. EVALUATION CRITERIA:

The evaluation criteria will be based on the following requirements:

- Phase 0: Administrative requirements
- Phase 1 : Mandatory requirement
- Phase 2 : Evaluation on Specific Goals and Price – The threshold of 20 points.

Phase 0: Administrative requirements

- Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- Bidder must submit fully completed and signed bid documents:
 - ✓ Standard Bidding Document (SBD 4) Bidder's Disclosure.
 - ✓ **SBD 6.1 Preference Points Claim form.**
 - ✓ Signed **Request for Quotation (RFQ)** form.

Phase 1: Evaluation Criteria

Evaluation Area	Evaluation Criterion	Points
1. Bidder Experience	<ul style="list-style-type: none"> • To demonstrate bidder experience in terms of previous work done, bidders must submit three (3) reference letters from different public organizations as evidence of related training facilitation work previously conducted not older than 5 years= 40 points • No submission or less than 3 reference letters submitted = 0 points <p><i>Bidder must provide reference letters on a company letterhead, dated, and signed with contactable email address. Reference letters should be from the last five (5) years.</i></p> <p>Bidders to note that due diligence will be conducted against received references.</p> <p>Non-compliance with the above = 0 points</p>	40
2. Qualifications of the Facilitator	<p>Facilitator's qualifications will be evaluated as follows</p> <p>Bidder provided detailed CVs of lead Training Provider and one (1) team member reflecting one (1) years' experience, and proof of qualifications relevant to the scope of services. The facilitator must hold an NQF Level 8 or above on policy development or related area.</p> <p>Scoring</p> <ul style="list-style-type: none"> • Bidder submitted CV with NQF 8 and 5 years experience in training 	30

	<p>and development= 10 Point</p> <ul style="list-style-type: none"> • Bidder submitted CV with NQF 8 with 10 years experience 20 Points • Bidder submitted CV with NQF 8 and above with 10 years + experience = 30 Points <p>Non-compliance with the above = 0 points</p>	
Project Plan	<p>The bidder must submit the course outline and project time plan</p> <p>The bidder must provide a project plan with clear time frames of not more than 10 weeks of training.</p> <p>The project plan must indicate the following:</p> <ol style="list-style-type: none"> 1. Start date and end date 2. Number of Hours for the theoretical session 3. Course overview (What will be covered within the training) 4. Practical Assessment (Portfolio of Evidence) 5. When to issue certificates <p>Failure to submit the project plan indicating the above, the bidder will score 0</p> <p>Non-compliance with the above = 0 points</p>	30

NB: Failure to meet a minimum of 75 points in phase 2 will lead to disqualification and will not be evaluated on price and specific goals.

Phase 3: Price and Specific Goals

The evaluation for price and Specific Goals shall be based on the 80/20 PPPFA and points for evaluation criteria are as follows:

Evaluation Criteria		Points
1	Price	80
2	Specific Goals 10 black owned company 10 women owned company The BBBEE affidavit/SANAS accreditation BBBEE must form part of the submission.	20
Total		100

4. PRICING SCHEDULE

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.

4.1 Service providers are required to provide pricing for **the following**.

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

Description	Number of delegates	Method of training	Training cost per person (Inclusive of VAT)
Training: Policy Development, Implementation & Evaluation	15	Virtual	
Course Materials	15	Manuals (Must be delivered to NSETA)	

5. CONTRACT DURATION

5.1 The contract will be for a period of maximum of 10 weeks.

6. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 6.1 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.
6.2 The Contract site is at INSETA (as and when required).

7. WORKMEN AND SUPERVISION ON SITE

7.1 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.

8 CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 8.1 Signatory to SBD 7.2 contract form with the bidders approved submission as annexure to the contract.
8.2 Compliance with the general conditions of contract.
8.3 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
8.4 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.
8.5 The successful bidder will be required to have adequate professional indemnity as well liability insurance in place (**upon parties contracting**).
8.6 **Bidder must adhere to Protection of Personal Information (POPI) Act.**

9 SPECIFIC GOALS POINTS

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

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

- 9.1 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.
- 9.2 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.
- 9.3 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.
- 9.4 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.
- 9.5 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.

9.6 Consortium

- 9.6.1 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.
- 9.6.2 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.
- 9.6.3 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:

9.6.3.1 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)

9.6.3.2 Partner

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

9.6.4 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.

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

9.7 A joint venture

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

9.8 Unincorporated joint venture:

9.8.1 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.

9.9 Incorporated joint venture

9.9.1 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

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

10 COMMUNICATION

10.1 Respondents are warned that a response will be disqualified should any attempt be

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



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

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