

## ADVERTISEMENT

EXPRESSION OF INTEREST (EOI) TO APPOINT A SUITABLE SERVICE PROVIDER TO CONDUCT RESEARCH AND IMPACT ASSESSMENTS OF INSETA LEARNING PROGRAMMES ON A YEARLY BASIS FOR A PERIOD OF (3 YEARS)

The Insurance Sector Education and Training Authority (INSETA), hereby invites interested public institutions, and experienced companies to assist in contributing to the INSETA Research Agenda by conducting impact studies in the field of insurance

The window to submit EOIs will be open from **15<sup>th</sup> May 2024** and will close on **31<sup>st</sup> May 2024**. **NO late submissions will be considered after 31<sup>st</sup> May 2024 at 17H00.**

### **Please Note:**

1. All public and private Research Institutions in South Africa may apply.
2. All submissions that are found to have a misrepresentation of information will not be considered.
3. All EOIs should contain sufficient information to allow the INSETA to make a fair determination on awarding/not awarding funds.
4. Collaborations with Private Sector and public Higher Education Institutions (HEIs) in submission of EOIs are encouraged due to INSETA's mandate to link the Private Sector with Public Higher Education Institutions.

Complete the attached EOI form and submit to INSETA

(only an authorised person must sign off before the form is submitted)

**Enquiries and/or submission of required documents must be directed to:**

Mr E Kaplan at [ernestk@inseta.org.za](mailto:ernestk@inseta.org.za) and Mr Z Desai at [zakariyyad@inseta.org.za](mailto:zakariyyad@inseta.org.za)



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

## SUMMARY OF APPLICATION

DETAILS	ESTABLISHMENT OF A RESEARCH PARTNERSHIP WITH INSETA
<p><b>Background</b></p>	<p>The Insurance Sector Education and Training Authority (INSETA), is a public entity listed in schedule 3A of the Public Finance Management Act (PFMA), and was established in March 2000. The INSETA must, in accordance with any prescribed requirements perform in accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), and any other relevant legislation and the Constitution.</p> <p>The aim of these studies is to provide a thorough impact analysis of past, present, and future INSETA learning programmes (learnerships, rural learnerships, Internships, Work Integrated Programmes and Bursaries) against the SETA's strategic objectives.</p>
<p><b>Purpose</b></p>	<p>The Insurance Sector Education and Training Authority (INSETA), hereby invites interested, independent, and experienced institutions/companies to conduct impact studies of INSETA learning programmes over a period of 3 Years.</p> <p><b>The study must cover:</b></p> <ul style="list-style-type: none"> <li>a. A summary overview of previous impact studies conducted by INSETA to provide a historical context and identify trends.</li> <li>b. Commence with an impact study annually of Learning Programmes from the period 2021/22 to 2024/25 financial year.</li> <li>c. Ascertain the demographic (i.e. company size, gender, race, population geography) distribution and impact of SETA-funded projects / activities.</li> <li>d. Assess the career path opportunities for learners within the INSETA sub-sectors through understanding key trends and challenges in the sub-sectors.</li> </ul> <p><b>The key objectives of the Research Partner are:</b></p> <ol style="list-style-type: none"> <li>1. To assess the employment status and absorption rate, and career progression of learners that were funded by the INSETA. This also includes challenges experienced by learners after the completion of a new learning programme.</li> </ol>

2. To assess the impact of INSETA accredited skills development providers through feedback provided by the programme beneficiaries.
3. To conduct case studies on learners for a more in-depth understanding.
4. To obtain perceptions of learners/graduates towards INSETA qualifications.
5. To examine what needs to be done to improve the qualifications as well as services rendered by the INSETA.
6. To ascertain whether the INSETA's interventions have positively changed the lives of beneficiaries.
7. To ascertain which INSETA programmes yielded the best results in learner uptake and absorption among all programmes and the reasoning around this.
8. To facilitate data collection workshops with all INSETA divisions to ensure the accuracy of data to be collected for the next 3 years and the importance of all data in future impact studies.
9. To design and review an impact study template and questionnaire that can be used annually over the next three (3) years.

**Scope of Work:**

The Impact Assessment is divided into the following functional areas:

1. Planning Phase - Development of a proposal illustrating the aim, objectives, desktop research and data collection methods and sampling techniques, deliverables, and timelines.
2. Data Collection and Analysis – Collation of both primary and secondary data for analysis. Primary data includes interviews with learners, training providers and employers and professional bodies. Secondary data includes the data collected from the previous impact studies conducted by INSETA.
3. Meetings – Regular steering committee(s) meeting attendance as and when required.
4. Reporting and Presentation – Compiling of progress reports for deliverables indicated in the proposal. Furthermore, presentation of preliminary and final results.
5. Disbursements – Telephone calls, emails, and travel (according to SARS rates).

<p><b>Deliverables</b></p>	<p><b>1. The Service Provider will be responsible for:</b></p> <p>1.1 Planning – Develop a detailed proposal for the Design and Development of an Impact Assessment model as part of the Impact study.</p> <p>1.2 Development of a detailed proposal showing all activities, deliverables, checkpoints, and timelines for the duration of the project, in accordance with the approved Expression of Interest (EOI).</p> <p>1.3 The proposal must adopt the mixed methods approach (i.e. qualitative and quantitative).</p> <p>1.4 Present the detailed proposal to the INSETA for their approval.</p> <p>1.5 The service provider will be required to produce a detailed final report at the end of the first year and subsequent years of the impact study.</p> <p><b>2. Data collection and analysis</b></p> <p>2.1 To facilitate data collection workshops with all INSETA divisions to ensure the accuracy of data to be collected.</p> <p>2.2 Develop the necessary Data Collection tools. (e.g. questionnaire and semi-structured interview guide/s)</p> <p>2.3 At least three attempts must be made to contact training providers, beneficiaries and employers and professional bodies before reporting that the participants are non-contactable.</p> <p>2.4 Training providers, beneficiaries, employers, and professional bodies will be contacted via cellphone, landline, email, face-to-face or virtual.</p> <p>2.5 Capture the data in a format that is presentable to INSETA. The raw data must be provided to the INSETA.</p> <p>2.6 Once all data is collected and cleaned, carry out an analysis of the data.</p> <p>2.7 Prepare a detailed analysis report for each of the programmes implemented as per the approved data analysis plan.</p> <p>2.8 Submit progress reports to the two Research Specialists/Skills Planning and Research Manager on a monthly basis.</p> <p><b>3. Progress reporting</b></p> <p>Provide regular progress reports to ensure monitoring of performance and progress in terms of data collection and analysis phases.</p> <p>3.1 Summary of activities undertaken and the progress in meeting deliverable(s);</p> <p>3.2 Deliverables for month to be attached to the report;</p>
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	<p>3.3 Deliverables achieved since last report; 3.4 Project financial status; 3.5 Issues and risks that may affect timescales or deliverables.</p> <p><b>4. Knowledge, qualification, and experience</b> The service provider must provide the INSETA with a Lead Researcher who has obtained the following qualifications and experience:</p> <p>4.1 Minimum of a master's degree in any of the related fields of Social Sciences, Education, Economics, Statistics or Management Sciences. Preference given to PhD holders. 4.2 Lead Researcher must have at least done and completed impact studies in the education/skills development/SETA environment and in any of the related fields of Social Sciences, Economics, Statistics or Management Sciences. 4.3 Knowledge and experience of learnerships, bursaries, skill programmes, internships and occupational qualification delivery. 4.4 Expertise in Programme, Monitoring and Evaluation. 4.5 Excellent communication and report writing skills.</p>
<b>Funding Window Opened</b>	<i>15<sup>th</sup> May 2024 and will close on 31<sup>st</sup> May 2024</i>
<b>Contract Duration</b>	The duration of the contract will be for a period of 3 years (36 Months), with annual renewals subject to satisfactory performance evaluation by INSETA.
<b>Details of the Proposal</b>	Bidders should note that the INSETA requires full details of the proposed project, and all proposals must include the following:

	<ol style="list-style-type: none"> <li>1. Institution Profile</li> <li>2. Introduction</li> <li>3. Problem Statement, Research Aim and Objectives</li> <li>4. Preliminary Literature Review</li> <li>5. Methodology including, but not limited to, empirical studies with data analysis, theoretical investigation, data-driven methodologies, case studies</li> <li>6. Project Implementation Plan including research budget</li> </ol> <p><i>Failure to comply with the above proposal structure will result in the rejection of your submission.</i></p>				
<b>Contract Amount</b>	Per appointed quotation. (Subject to negotiation)				
<b>Contract Scope/Funding Covers</b>	The INSETA will draw up a Service Level Agreement (SLA) with the service provider, as well as a project plan. This plan will include conducting annual impact studies of learning programmes for the financial years 2021/22 up to 2024/25, ensuring one research output per year over the three-year period. Funding will cover completed research outputs produced to the satisfaction of INSETA				
<b>Proposal Evaluation Process</b>	<p>The evaluation process is to be undertaken in two stages as follow:</p> <table border="1" data-bbox="607 1023 1821 1273"> <tr> <td data-bbox="607 1023 1211 1193"><b>Stage 1: Mandatory Criteria</b></td> <td data-bbox="1211 1023 1821 1193">           Institution's submission format in compliance with the format outlined in:           <ul style="list-style-type: none"> <li>• Details of the Proposal</li> <li>• Mandatory Evaluation Criteria</li> </ul> </td> </tr> <tr> <td data-bbox="607 1193 1211 1273"><b>Stage 2: Functionality Evaluation Criteria</b></td> <td data-bbox="1211 1193 1821 1273">Institutions' content of the proposal assessed based on the functionality evaluation criteria</td> </tr> </table>	<b>Stage 1: Mandatory Criteria</b>	Institution's submission format in compliance with the format outlined in: <ul style="list-style-type: none"> <li>• Details of the Proposal</li> <li>• Mandatory Evaluation Criteria</li> </ul>	<b>Stage 2: Functionality Evaluation Criteria</b>	Institutions' content of the proposal assessed based on the functionality evaluation criteria
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<b>Stage 2: Functionality Evaluation Criteria</b>	Institutions' content of the proposal assessed based on the functionality evaluation criteria				
<b>Mandatory Evaluation Criteria</b>	Interested parties are requested to note that this is a mandatory criteria and failure to comply with the requirements as set below will result in any party's submission being rejected.				

Institutions shall submit their responses in accordance with the response format specified below (each schedule must be clearly marked, indexed and /or clearly referenced):

Schedule 1:

1. Cover Page: The cover page must clearly indicate the name of the institution and legal registration information as a higher education institution. The cover letter should be brief (not more than two pages maximum).
2. Executive Summary: Describe why your institution should be considered as the best qualified to achieve any/or of the services enlisted in this expression of interest. Brief institutional profile (not more than five pages maximum).
3. Experience: Submit a detailed list of similar services/appointments completed, supported by reference letters for each/respective service/appointment listed above.
4. Qualifications and Experience: This subsection must contain relevant information on qualifications and experience of the project team as follows:
  - Project implementation structure: The proposed composition and implementation of the team/personnel. This list should include the identification of the project partner who will have primary responsibility for the INSETA appointment, and project team/ other personnel to be allocated for this appointment.
  - Qualifications and Experience: This part must contain relevant information on the qualifications and experience related to the project team and proposed project partner.
5. Signature Requirements: All proposal must be accompanied by the EOI Form issued with this EOI and signed on behalf of the institution by an authorised person only. The name and title of the individual(s) signing the bid must be clearly shown with the signature. A power of attorney is required If any other person signs the proposal and/supporting documents on behalf of the institution.
6. Research Proposal: The research proposal must cover the following aspects: (1) Proposed methodology and approach for assessing the impacts of INSETA's learning programmes (2) Framework for evaluating INSETA's skills development interventions (3) Details outlining the specific impact areas, outcomes, and components to be analysed during the assessment (4) Strategies for engaging relevant stakeholders to gather data and insights.

	<p>Schedule 2:</p> <p>The following supporting documents must be submitted in this schedule:</p> <ol style="list-style-type: none"> <li>1. Valid tax clearance certificate or confirmation of pin</li> <li>2. Certified copies of the institution's registration with the DHET (if applicable)</li> <li>3. Certified copies of the proposed research partner's professional accreditation (if applicable)</li> </ol>		
<p><b>Functional Evaluation Criteria</b></p>	<p><b>Evaluation Area</b></p>	<p><b>Functional Criteria</b></p>	<p><b>Max Points</b></p>
	<p><b>Qualifications</b></p>	<p>Qualifications of the Lead Researcher/project team leader are a minimum of a Master's degree in any of the following fields: <b>Social Sciences, Education, Economics, Statistics or Management Sciences. Preference will be given to PhD holders.</b></p> <ul style="list-style-type: none"> <li>• NB. Attach certified copy (not older than 3 months of qualification and the CV of the Lead Researcher/project team leader <b>Masters = 10 points</b> <b>PhD = 30 points</b></li> <li>• Uncertified qualification certificates will not be accepted as authentic = <b>0 points</b></li> </ul>	<p><b>30</b></p>
	<p><b>Experience: Lead researcher</b></p>	<p>Lead Researcher/project team leader must have at least done and completed impact studies in the education/skills development/SETA environment and in any of the related fields of Social Sciences, Economics, Statistics or Management Sciences.</p> <p><b>Bidder to submit evidence of the studies completed:</b></p> <ul style="list-style-type: none"> <li>• 3 impact studies, with exactly 1 in the education/skills development/SETA environment (Please attach samples) = <b>10 points</b></li> </ul>	<p><b>20</b></p>



		<ul style="list-style-type: none"> <li>• 4 or more impact studies, with at least 2 in the education/skills development/SETA environment (Please attach samples) = <b>20 points</b></li> <li>• Less than 3 impact studies, or no studies in the education/skills development/SETA environment, or no samples attached = <b>0 points</b></li> </ul> <p><i>NB: Experience should be in a table format with contactable references, for example: Name of institution, title of the study, year conducted, year completed, and purpose of the study, contactable reference name/s, and contact details</i></p>	
	<p><b>Reference letters</b></p>	<p>The bidder is required to submit reference letters and contactable clients, on the impact studies submitted as samples.</p> <p>NB: The Reference Letter must be on the letterhead of the previously serviced client and should reflect the name of the client, title of the impact study, year conducted, year completed, purpose of the study, contactable reference name and contact details (active email), and it must be duly signed.</p> <ul style="list-style-type: none"> <li>• 3 reference letters, each corresponding to a separate impact study submitted as a sample = <b>10 Points</b></li> <li>• 4 or more reference letters, each corresponding to a separate impact study submitted as a sample = <b>20 points</b></li> <li>• Less than 3 reference letters, or reference letters not corresponding to impact study samples = <b>0 points</b></li> </ul> <p>Note: Due diligence will be conducted against reference letters submitted.</p>	<p><b>20</b></p>

	<p><b>Project resourcing</b> Bidders are required to submit a detailed project plan with clear timelines detailing team members name, position, certified qualifications, and work experience:</p> <p><b>Non-submission of minimum requirements below equals zero (0)</b></p> <p>Project plan with clear timelines = <b>10 Points</b></p> <p>Project team with a minimum of three to four team members = <b>20 points</b></p> <p>Project team with five team members and above = <b>30 Points</b></p>	<p><b>30</b></p>
<p><b>TOTAL</b></p>		<p><b>100</b></p>
<p><b>NB: Bidders are required to score a minimum of 70 points on functional evaluation, and bidders who scored below the minimum threshold of 70 points will be disqualified.</b></p>		
<p><b>Enquiries or Application submissions to:</b></p>	<p>Mr. E Kaplan at <a href="mailto:ernestk@inseta.org.za">ernestk@inseta.org.za</a> and Mr. Z Desai at <a href="mailto:zakariyyad@inseta.org.za">zakariyyad@inseta.org.za</a></p>	