



**inseta**

INSURANCE SECTOR EDUCATION  
AND TRAINING AUTHORITY

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

## **EXPRESSION OF INTEREST (EOI) FOR APPOINTMENT OF SERVICE PROVIDER TO CONDUCT AN END-TO-END (COMPLIANCE PRE-EVALUATION, SCREENING AND COORDINATION OF THE DG APPLICATION WINDOW SUBMISSIONS) FOR THE DISCRETIONARY GRANT TO THE INSETA DG COMMITTEES.**

INSETA seeks to appoint a qualified professional and experienced service provider preferable that has experience with **SETA environment** in implementation capabilities that will be able to conduct the compliance pre-evaluation and due diligence (where necessary and as and when required), in line with SETA policies and procedures, for the awarding of Discretionary grants applications in line with the SETA's grant funding criteria.

The invitation to submit EOIs will be open on the 30 April 2024 and closes on the 10 May 2024 and all EOIs must be forwarded to [DGEOLs@inseta.org.za](mailto:DGEOLs@inseta.org.za) – **All submissions forwarded later than 16H00 on the 10 May 2024 will not be considered.**

### **Please Note:**

1. All EOIs forwarded must be in PDF Format and forwarded to the correct email address [DGEOLs@inseta.org.za](mailto:DGEOLs@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.

Complete the attached EOI form and attach all required documents as per Summary of Application 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 INSETA and addressed to Ms Serurubele Mutinhima at email address [Serurubelem@inseta.org.za](mailto:Serurubelem@inseta.org.za) (011) 381-8900

## SUMMARY OF APPLICATION

### Definition:

INSETA is requiring a suitably qualified Service Provider to conduct an end-to-end (Compliance pre-evaluation, screening and coordinating of the DG application window submissions) for the discretionary grants to the INSETA DG committees.

### Contract Period:

The duration of the contract will be for the period of 18 months.

### Eligibility criteria and Important Components to be included in an EOI:

#### The EOI must be submitted with the following:

1. The Service Provider must submit a minimum of **three (3) reference letters NOT (client List)** that reflect the previous experience or work done in Discretionary Grant preferable from SETA Environment compliance and evaluation processes. The reference letters must have contactable references (Email or telephone contact) and must be signed, dated and be on the Company letterhead.

1.1 The Service Provider must provide a **Detailed Project Plan** containing all the phases, timeframes, and reporting within the period.

1.1.1 Initiation

1.1.2 Implementation

1.1.3 Planning

1.1.4 Project Report

1.1.5 Project closure report

1.2 The Service Provider must provide a **Detailed Company Profile**.

1.3 The Service Provider must provide the resources, detailing team members name, position, qualifications, and work experience between **2 to 5 years** in the skills development space.

Methodology and Proposed project execution plan which demonstrate a thorough understanding of Discretionary grant allocation process 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 to conduct an end-to-end (Compliance pre-evaluation, screening, and coordination of the DG application window submissions) for the Discretionary grants applications to the INSETA DG Committees.

#### 1. Initiation

1.1 The Service Provider must present a viewing of the discretionary grant applications and listing the name of the submissions received.

1.2 The Service Provider must confirm the application received versus the advert.

#### 2. Implementation

2.1 The Service Provider must work on the compliance checklist that will be automated into the organisation's system.

2.2 The Service Provider must conduct compliance on the documents received.

2.3 The Service Provider must conduct screening of applications received.

2.4 The Service Provider must pre-evaluate.

2.5 The Service Provider must coordinate documents received as per the checklist.

## Eligibility criteria and Important Components to be included in an EOI:

- 2.6 The service provider must conduct desktop evaluation.
- 2.7 The service provider must be able to sort out new companies from the submissions.
- 2.8 The service provider must conduct the due diligence process – (as and when required); **NB: INSETA will be responsible for travelling arrangement.**

### 3. Project reporting

- 3.1 The Service Provider must present to the DG committees the consolidated applications windows information for consideration and recommendation for approval.
- 3.2 The Service Provider must ensure all necessary source records and supporting documents are kept safe for an audit trail for the compliant DG process for the respective windows, in line with INSETA guidelines and adherences to POPIA 2014.
- 3.3 The Service Provider must submit reports on the application process (accepted and rejected applicants) of Discretionary Grant applications to the Executive Management of INSETA upon agreed time frames.

### 4. Project Closure Report

- 4.1 The Service Provider must submit a report on progress and recommendations made for each respective window.

## Programme Duration:

5. The duration of the project or contract will be for period linked to the current application Window of the **financial year 2024/25 for 18 months.**
- 5.1 As per the closing application of the DG windows;
- 5.1.1 Catalytic Projects
- 5.1.2 All other Learning Programs
- 5.1.3 Average number of applications received – (460 -Learning Programs)
- 5.1.4 Average number of applications received – (40 Catalytic Projects)
- 5.1.5 Average number of due diligence where it will be conducted (100 -Site Visits)

## 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:

- Tax Certificate
- Proof of Bank Account Letter
- CSD Registration
- Company Registration
- BBBE Affidavit or Certificate
- Letter of Authorisation (stating details of Authorised Signatory for contracting)

## In Scope

Innovative EOI aligned to INSETA's Annual Performance Targets and Sector Skills Plan.

## Enquiries or Submission to:

serurubelem@inseta.org.za (011) 381-8900