

REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT REPORT WRITING TRAINING FOR 25 INSETA STAFF, FOR PROFESSIONAL CORPORATE REPORTS

RFQ	RFQ/INS/2024/25/30
RFQ ISSUE DATE	01 AUGUST 2024
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT REPORT WRITING TRAINING FOR 25 INSETA STAFF, FOR PROFESSIONAL CORPORATE REPORTS
CLOSING DATE & TIME	08 AUGUST 2024 – AT 11:00 – LATE SUBMISSION WILL NOT BE CONSIDERED.
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 the 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: _____

Board Members: Mr. J.S. Ngubane (Chairperson), Ms. V. Pearson (Organised Employer), Ms. L. van der Merwe (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



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 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.

2. OBJECTIVES

- 2.1** INSETA seeks to appoint a suitably qualified and experienced service provider to conduct report writing training for 5 Executives, 15 Managers, and 5 Senior Specialists on how to write a professional formal business report.

3. DETAILED SPECIFICATION

- 3.1** The appointed Service Provider will liaise with the HR Manager in terms of coordination of the training.
- 3.2** The Service Provider will be required to meet the expected deliverables listed below, for the duration of the project.
- 3.3** The Service Provider will conduct the training at INSETA offices during the official working hours after signing INSETA's Service Level Agreements.
- 3.4** The service provided is expected to provide a Structured report
- 3.5** The format of writing the professional formal corporate report, e.g. the structure entailing amongst others, the introduction, background, discussion, conclusion, and recommendations, and the layout of the report will form part of the key focus areas during the delivery of the training intervention.
- 3.6** Ensure the document sequence is logical and meaningful
- 3.7** Use professional English to write a professional formal corporate report
- 3.8** How to present information differently: text, graphs, tables, flow charts and diagrams
- 3.9** Barriers to effective report writing
- 3.10** Report writing skills – Sentences; tips on joining words and punctuation
- 3.11** Writing good paragraphs
- 3.12** Revising and editing
- 3.13** Writing and improving the quality of business and technical reports
- 3.14** Discuss the focus of the report – deciding on the correct content
- 3.15** How to select, format, structure, and layout reports: including headings, bullets, and numbering

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4. EXPECTED DELIVERABLES

- 4.1 Submit a detailed work plan for the period of the project.
- 4.2 Develop and submit a detailed training manual and all relevant material to be approved by INSETA, ensuring that they are in line with the objectives of the project.
- 4.3 Print approved training manuals for all training attendees.
- 4.4 Conduct face-to-face training for the Executives, Managers, and Senior specialists on business communication particularly focusing on how to write a professional corporate report.
- 4.5 Conduct pre and post-training evaluations and provide a detailed training report with recommendations.
- 4.6 Provide training completion certificates to participants.
- 4.7 Explain why data and information must be reliable and valid, which information to use, and how to map that information into a compelling report format
- 4.8 How to gather data and turn it into useful information
- 4.9 The training must be conducted at INSETA premises; 18 Fricker Road, Illovo, Sandton

5. EVALUATION CRITERIA:

5.1 The evaluation criteria will be based on the following requirements:

- Phase 0: Administrative requirements
- Phase 1: Mandatory requirement
- Phase 2: Functional criteria
- Phase 3: Evaluation of Specific Goals and Price

6. ADMINISTRATIVE CRITERIA

- 6.1 Proof of registration on CSD (*Central Supplier Database*)
- 6.2 Bidder must provide proof (BBBEE Certificate accredited by SANAS or BBBE
- 6.3 Department of Trade Industry (DTI) Sworn Affidavit template)

7. Phase 1: MANDATORY CRITERIA

- 7.1 **The Service providers must attach a valid accreditation certificate with a relevant professional body.**

NB: Failure to comply with the mandatory requirements will lead to disqualification

Phase 2: Functional Criteria

Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria are designed to reflect INSETA's requirements in terms of identifying a suitable service provider and ensuring the selection process is transparent and affords all the bidders a fair opportunity for evaluation and selection.

Evaluation Area	Functional Criteria	Max Points
<p>Company profile – The bidder is to provide a written introduction to the company, that outlines the experience report writing training.</p>	<p>The bidder must provide a company profile detailing a number of years of experience in providing report-writing training for Executives and Managers in a professional corporate environment.</p> <p>Points allocation matrix:</p> <ul style="list-style-type: none"> ▪ Company profile attached detailing the number of years in training executives and managers on report writing in the professional corporate environment. <ul style="list-style-type: none"> • 20 years and above = (20 Points) The company profile must be detailed and indicate the number of years of training provided for executives and managers. • 15 – 19 years = (15 Points) The company profile must be detailed and indicate the number of years of providing report writing training for executives and managers. • 11-14 years = (10 Points) The company profile must be detailed and indicate the number of years of providing report writing training for executives and managers. • 05 -10 years' = (5 Points) The company profile must be detailed and the details the number of years of providing report writing training for executives and managers. • Non-compliance with minimum points = 0 points 	<p>20</p>

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<p>Approach and methodology aligned to a detailed project plan with a clear turnaround time. Develop a detailed training manual with a Practical assessment tool and completion.</p>	<p>The Bidder must provide an actionable proposal with a project plan, and deliverables, Practical Assessment, issuing of certificates, and demonstrate clear turnaround times in terms of response and delivery of the items.</p> <p>Points allocated = 25</p> <p>Non-compliance with minimum points = 0 points</p>	<p>25</p>
<p>Bidders Experience: Bidder's proven competency in providing professional Corporate report writing reports</p> <p>Note: Reference must be from different clients not all from the same client. Should the submitted reference letters emanate from the same client, the submission will be scored as one submission.</p>	<p>Bidder must provide at least five (5) Reference letters, from contactable and existing clients, the letters must be within 5 years before the closing date of this RFQ rendering services for the provision of training in report writing, <i>(The reference letter must be signed, and dated, on the company letterhead of the reference and must have a contactable email address and telephone)</i></p> <p>Points allocated = 30</p> <ul style="list-style-type: none"> • Five (5) or above Reference letters from the existing clients (within the 5 last years from the closing date of the RFQ) = 30 points • Four (4) Reference letters that align with submitted letters from the existing client (within the last 5 years from the closing date of the RFQ) = 20 • Three (3) Reference letters that align with submitted letters from the existing client (within the last 5 years from the closing date of the RFQ) = 10 • Non-compliance or non-submission of the minimum number of reference letters = 0 points 	<p>30</p>

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<p>Team Member/ Facilitator – Qualification and experience</p>	<p>The bidder must provide a detailed CV that highlights the number of years in report writing training as well as certified qualification. The facilitator must hold an NQF level 8 or above.</p> <p>Points allocation matrix:</p> <ul style="list-style-type: none"> • 0-5 Years experience in report writing training - CV and relevant qualifications = (10 points) • 6 -9 Years experience in report writing training - CV, and relevant qualifications = (20 points) • 10 years + Experience in report writing training - CV, and relevant qualifications = (25 points) <ul style="list-style-type: none"> • Non-compliance with the minimum requirement = (0 point) 	<p>25</p>
<p>TOTAL</p>	<p>100</p>	

NB: Bidders who obtain less than the minimum threshold of 70 points will be declared non-responsive and therefore will not be eligible for evaluation of Specific Goals & Price Preference.

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	20
Total		100

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8. PRICING SCHEDULE

- 8.1 The 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. The pricing must be inclusive of all the deliverables. **The quotation must be according to the number of hours and number of (25) delegates.**

9. TIMEFRAMES

- 9.1 The duration of the contract will be for **three (3) months** on an as-and-when-required basis.
9.2 The expected turnaround time for the conducting of the report writing training is upon receipt of the purchase order or appointment letter.

10. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 10.1 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.
10.2 The Contract site is at INSETA (as and when required).

11. WORKMEN AND SUPERVISION ON-SITE

- 11.1 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.

12. CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 12.1 Signatory to SBD 7.2 contract form with the bidder's approved submission as annexure to the contract.
12.2 Compliance with the general conditions of the contract.
12.3 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
12.4 In the case of the service provider using sub-contractors, the former will be responsible for ensuring the delivery of services from any such sub-contractors and for making any payments to such sub-contractors.

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- 12.5** The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (**upon parties contracting**).
- 12.6 Bidder must adhere to the Protection of Personal Information (POPI) Act.**

13. SPECIFIC GOALS POINTS

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

- 13.1.1 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.
- 13.1.2 The organ of state reserves the right to require 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.
- 13.1.3 Bidders who qualify as EMEs and QSEs in terms of the B-BBEE Act must submit a Sworn affidavit. Misrepresentation of the information constitutes a criminal offense.
- 13.1.4 Bidders other than EMEs or QSE's must submit their original and valid B-BBEE status level verification certificate and BBEE Scorecard, substantiating their B-BBEE rating and black ownership issued by SANAS.
- 13.1.5 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.

13.2 Consortium

- 13.2.1 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.
- 13.2.2 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 endeavor, particularly the division of profits. A consortium is formed by contract, which designates the rights and obligations of each member.
- 13.2.3 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 an RFQ/Bid process is such that the lead partner is identified and the following requirements are required as follows:

13.2.3.1 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 fulfills the requirements of the bid through a combination of skills)

13.2.3.2 Partner

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

13.2.4 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.

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

13.3 A joint venture

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

13.4 Unincorporated joint venture:

13.4.1 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

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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.

13.5 Incorporated joint venture

13.5.1 This is 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 completed by the entity/ company the name of the joint venture, and the following will be required amongst others

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

14. COMMUNICATION

- 14.1** 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 the BID process, between the closing date and the date of the award of the business.
All inquiries relating to this BID should be emailed **three days before the closing date.**

15. 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 that 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 competition shall remain open for acceptance by the Organization for a period of **90 days** from the closing date of the BID Enquiry.

16. INSETA reserves the right to:

- 16.1** Not evaluate and award a bid that does not comply strictly with this BID document.
- 16.2** Make a selection solely on the information received in the Bid Document and Enter into negotiations with any one or more of the preferred bidder(s) based on the criteria specified in the terms of reference.
- 16.3** Contact any bidder during the evaluation process, 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.
- 16.4** Cancel this BID at any time as prescribed in the PPPFA.
- 16.5** Should bidder(s) be selected for further negotiations, they will be chosen based on cost-effectiveness and the principle of value for money not necessarily based on the lowest costs.

17. COST OF BIDDING

- 17.1** The bidder shall bear all costs and expenses associated with the 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.

END OF DOCUMENT

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