

**REQUEST FOR QUOTATION (RFQ)**

**APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A MICROSOFT EXCEL TRAINING (ADVANCE LEVEL AND INTERMEDIATE LEVEL ) FOR FIFTY-NINE (59) ADMINISTRATORS AND FORTY-ONE (41) SPECIALISTS**

<b>RFQ</b>	<b>RFQ/INS/2024/25/0055</b>
<b>RFQ ISSUE DATE</b>	<b>02 October 2024</b>
<b>BRIEFING SESSION</b>	<b>N/A</b>
<b>RFQ DESCRIPTION</b>	<b>APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A MICROSOFT EXCEL TRAINING (ADVANCE LEVEL AND INTERMEDIATE LEVEL ) FOR FIFTY-NINE (59) ADMINISTRATORS AND FORTY-ONE (41) SPECIALISTS</b>
<b>CLOSING DATE &amp; TIME</b>	<b>07 October 2024, at 11:00am, LATE SUBMISSIONS WILL NOT BE CONSIDERED.</b>
<b>LOCATION FOR SUBMISSIONS</b>	<a href="mailto:rfqs@inseta.org.za">rfqs@inseta.org.za</a>

**Bidders must submit responses via e-mail at: [rfqs@inseta.org.za](mailto:rfqs@inseta.org.za)**, before the stipulated date and time. **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.

SUPPLIER NAME: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

FAX NO: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

## DETAILED TECHNICAL SPECIFICATION

### APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A MICROSOFT EXCEL TRAINING (ADVANCE LEVEL AND INTERMEDIATE LEVEL ) FOR FIFTY-NINE (59) ADMINISTRATORS AND FORTY-ONE (41) SPECIALISTS

#### 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 appoint a suitably qualified and experienced service provider to conduct Microsoft Excel Training (advanced and intermediate level) for fifty-nine (59) Administrators and forty-one (41) Specialists.

#### 2. SCOPE OF WORK

- 2.1 The appointed Service Provider will liaise with the Human Resources Department in terms of coordination of the training.
- 2.2 The Service Provider will be required to meet the expected deliverables listed below, for the duration of the project.
- 2.3 The Service Provider will conduct the training at INSETA offices during the official working hours (08h30-17h00)
- 2.4 The **Microsoft Excel Training Intermediate level** should include but not be limited to:
  - 2.4.1 An Overview of Microsoft excel, Workbooks and Worksheets, Creating Multiple Views, Formatting and Editing Worksheets, Printing and Page Setup, Working with Formulas, Using Functions(The TEXT function , Database Functions), Charts e.t.c
  - 2.4.2 The **Microsoft Excel Training Advance Level** should include but not be limited to:
  - 2.4.3 Formulas and Functions, Conditional Formatting, Worksheet Protection, Managing Data, Preparing Data(Autosum, Quick Analysis Totals, Named Ranges, Absolute & Relative Referencing), Lookup Functions(VLOOKUP Introduction, Approximate Match, VLOOKUP with column numbers, VLOOKUP with MATCH, VLOOKUP with Named Ranges), Text Functions, Logical Functions, Statistical and Mathematical Functions, Date and Financial Functions, Sorting Data, Subtotalling Data, Filtering Data, Data Validation, What-If Data Analysis, Macros, Designing, formatting and displaying Pivot Tables, Calculated Fields and Items, Sorting and Filtering Pivot Tables, Pivot Charts, Pivot Table Options e.t.c.

## **N:B**

The service provider must issue a certificate of attendance upon completion of the training (Certificates issued to be valid for two years)

The service provider must provide training materials

INSETA will provide catering services

Training Providers should be accredited to provide desired courses

## **Deliverables**

- 1.1 Submit a detailed work plan for the period of the project.
- 1.2 Develop and submit a detailed training manual and all relevant material to be approved by INSETA, ensuring that they are in line with the specific objectives of the project.
- 1.3 Print approved training manuals for all training attendees.
- 1.4 Conduct face-to-face training for the Administrators and Specialists on Microsoft Excel (advance and intermediate level)
- 1.5 Conduct pre and post-training evaluations and provide a detailed training report with recommendations.
- 1.6 Provide training completion certificates to participants.
- 1.7 The training must be conducted at INSETA premises; 18 Fricker Road, Illovo, Sandton.

## **3. DELIVERABLE AND TIMEFRAMES**

- 3.1 This is a once-off appointment (2 days training)
- 3.2 Day 1: **Microsoft Excel Training Intermediate level**
- 3.3 Day 2: **Microsoft Excel Training Advance Level**
- 3.4 Submit a detailed work plan for the period of the project.
- 3.5 Develop and submit a detailed training manual and all relevant material to be approved by INSETA, ensuring that they are in line with the specific objectives of the project.
- 3.6 Print approved training manuals for all training attendees.
- 3.7 Conduct face-to-face training for the Administrators and Specialists on Microsoft Excel (advanced and intermediate level)
- 3.8 Conduct pre and post-training evaluations and provide a detailed training report with recommendations.
- 3.9 Provide training completion certificates to participants.
- 3.10 The training must be conducted at INSETA premises; 18 Fricker Road, Illovo, Sandton.

#### **4. CONTRACTUAL OBLIGATION**

- 4.1 The service provider's quotation must also provide sufficient detail in terms of all associated cost.
- 4.2 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.
- 4.3 Bidder will be subjected to review in terms of measuring satisfactory performance.
- 4.4 Bidders are required to fully comply with the relevant SCM Legislative Framework and apply regulatory and prescripts. Bidders are also required to take all reasonable steps to protect the information, in line with the provisions of the POPIA 4 of 2014.

#### **5. ABSENCE OF OBLIGATION & CONFIDENTIALITY**

- 5.1 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.
- 5.2 The Contract site is at **INSETA (as and when required)**.

#### **6 WORKMEN AND SUPERVISION ON SITE**

- 6.1 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.

#### **7. ADMINISTRATIVE COMPLIANCE**

- 7.1 The Standard Bid Document (SBD) forms as annexured to this RFQ must be fully completed, signed by the authorized company representative.
- 7.2 Bidders must initial each page of General Conditions of Contract (GCC).
- 7.3 Bidder must submit proof of registration on CSD (Central Supplier Database).
- 7.4 The bidder will be verified if they are not listed on database of restricted suppliers and register of tender defaulter. The bidder will also be verified if they are in business.

#### **8. MANDATORY CRITERIA**

- 8.1 The Service providers must attach to their RFQ response at least (03) three reference letters where Microsoft Excel Training (advanced and intermediate level) was rendered within the past five (5) years.

**Service providers must make sure that the reference letter is signed and entails the following but is not limited to:**

- The name of the entity who is providing reference letters in a form of a letterhead.
- The full contact details of the entity who is on the reference letters.

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- The reference letters must be duly signed and dated and not be older than three years old.
- A brief description of the project which was completed by the service provider.

**Failure to provide this mandatory information will lead to the bidder's proposal not been considered further on price and Specific goals.**

## 9. ABSENCE OF OBLIGATION & CONFIDENTIALITY

9.1 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.

9.2 The Contract site is at **INSETA (as and when required)**.

## 10. WORKMEN AND SUPERVISION ON-SITE

10.1 The service provider shall be held responsible for the conduct of his employees and the conduct of his sub-contractor employees for the full duration of the contract.

## 11. PREFERENCE EVALUATION

### 11.1 Specific Goals and Price

As the tender **price is estimated to be between R2001 and R50 million including VAT**, the tender responses will be evaluated on the **80/20**-point system.

### PRICING SCHEDULE

#### EXCELL TRAINING FOR 100 PEOPLE

ITEM	DESCRIPTION	QUANTITY	PRICE PER PERSON
1	Microsoft Excel Training Intermediate Level	1 Day	
2	Microsoft Excel Training Advanced Level	1 Day	
3	Certificates	200	
4	Transport	2	
5	<b>TOTAL INCLUDING VAT</b>		

### ADJUDICATION USING A POINT SYSTEM

11.1 The bidder obtaining the highest number of total points will be awarded the contract unless

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objective criteria justify the award to another bidder.

- 11.2 Preference points shall be calculated after the process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 11.3 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.
- 11.4 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.
- 11.5 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

## 12. POINTS AWARDED FOR PRICE AND BBBEE PREFERENCE POINT

The **80/20** preference point system.

A maximum of **80** points is allocated for price on the following basis:

$$P_s = 80 \{1 - (P_t - P_{\min})\}$$

$P_{\min}$

Where:

$P_s$	=	Points scored for comparative price of bid under Consideration
$P_t$	=	Comparative price of bid under consideration
$P_{\min}$	=	Comparative price of lowest acceptable bid



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**13. SPECIFIC GOALS PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:**

13.1 Table 1: Specific goals for the RFQ or bid process and points claimed are indicated per the table below.

13.2 Where either the **90/10** or **80/20** preference point system is applicable, corresponding points must also be indicated as such. 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)
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.

13.3 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.

13.4 Bidders other than EMEs or QSEs 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.

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.

#### **14. Consortium**

14.1 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.

14.2 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.

14.3 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 are such that the lead partner is identified, and the following requirements are required as follows:

##### **a) 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 the combination of skills)

##### **b) Partner**

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

14.4 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 BBBEE status level 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. Of importance is that in a consortium, each individual team members retain their identities.

#### **15. A joint venture**

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

##### **a. Unincorporated joint venture:**

- i. 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

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completed in the name of the joint venture, and the following will be required from both parties, amongst others

- a) SBD 4
- b) SBD 6
- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

**b. Incorporated joint venture**

i. 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

- a) SBD 4
- b) SBD 6
- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

ii. A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.

c. A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.

## 16. COMMUNICATION

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.**

## 17. CONDITIONS TO BE OBSERVED WHEN BIDDING

- 17.1 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.
- 17.2 No BID shall be deemed to have been accepted unless and until a formal contract/letter of award is prepared and executed.
- 17.3 The competitive shall remain open for acceptance by the Organization for a period of **60 days** from the closing date of the BID Enquiry.
- 17.4 **INSETA reserves the right to:**
- 17.5 Not evaluate and award a bid that does not comply strictly with this BID document.
- 17.6 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.
- 17.7 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.
- 17.8 Cancel this BID or RFQ at any time as prescribed in the PPPFA.
- 17.9 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the cost effectiveness and the principle of value for money not necessarily on the basis of the lowest costs.

## 18 Cost of Bidding

- 18.1 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.

## 19 Note to Bidders:

- 19.1 Due diligence to be conducted by INSETA prior to the award of the contract.

## **END OF TERMS OF REFERENCE DOCUMENT**



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**Annexed to this document for completion and return with the document:**

- **SBD 4**
- **SBD 6.1**
- **General Conditions of Contract (GCC)**

**Notte: if incomplete forms documents are submitted, INSETA reserves the right to request bidder to submitted complete documents for compliance.**



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