

RFQ REQUEST FOR QUOTATION

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A CULTURE SURVEY, CHANGE MANAGEMENT FACILITATION AND TRAINING FOR THE INSETA FOR A PERIOD OF 24 MONTHS.

RFQ	RFQ/INS/2024/25/0097
RFQ ISSUE DATE	27 NOVEMBER 2024
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A CULTURE SURVEY, CHANGE MANAGEMENT FACILITATION AND TRAINING FOR THE INSETA FOR A PERIOD OF 24 MONTHS
CLOSING DATE & TIME	04 DECEMBER 2024 at 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: _____

Board Members: 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 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 The primary purpose of the survey is to assess satisfaction of employees within the INSETA and further provide recommendations based on the feedback from employees and assess post implementation of the recommendations. The survey aims to measure and identify areas for improvement in employees' workplace experiences. The survey will provide insight into how employees feel about the organization's leadership, communication and work-life balance, amongst others.
- 1.3 The INSETA has 140 employees and seeks to appoint a competent, capable, and experienced service provider to conduct an organisational climate culture survey and change management facilitation in line with the Excellence Model for a period of 24 months and motivate employees within INSETA.
- 1.4 Employees will benefit in terms of team development which is a cornerstone for productivity. As a value add the service provider should give advice or its opinion on how the current INSETA culture status aligns to the desired state or future strategic goals/objectives and best practice service.

2. OBJECTIVES

- 2.1 The objective of this RFQ is to request quotations from service providers to conduct an employee organisational climate culture survey; change management facilitation and training for the INSETA for a period of 24 months. The importance of an organizational climate survey lies in the fact that :
 - Measure the health of the organisation
 - Build on the strengths and take action in areas that need improvement.
 - Measure the impact of policies and procedures of the organization
 - Motivate and improve job satisfaction
 - Enhance the employee experience within the INSETA

2.2 The main research objectives of the study are:

2.2.1 **Organisation**

This includes the employee's experience within INSETA. It covers contributors such as remuneration, benefits, recognition, and loyalty to the organisation. An additional assessment of the employee understanding of the INSETA mandate and activities.

2.2.2 **Leadership**

An identification of potential gaps in Leadership and enhanced engagement efforts by Management within INSETA.

2.2.3 **Employee Development:** This seeks to make Management understand if opportunities for employee development are sufficient and their enhancement of the employee's skills, abilities and knowledge.

2.2.4 **Daily job:** An assessment of the employee's understanding on the daily deliverables and impact towards achievement of the INSETA's objectives.

2.2.5 **Engagement:** assess the employee satisfaction with the communication between the INSETA and the employees

2.3 Desired satisfaction: develop a roadmap to assist the INSETA to realise its desired satisfaction level.

The following platforms are used by the INSETA to engage its employees (but not limited to):

- Website and Employee Information System
- Social Media
- Email
- Engagement Forums
- Meetings
- Employee General Meetings

3. SCOPE OF WORK/DELIVERABLES

The successful service provider will be expected to render the following services:

3.1 To develop a survey instrument for approval by INSETA Management

3.2 First session : Research Methodology and Sample

- To conduct a climate and culture survey, subsequently conduct formal training focusing on explaining and illustrating the importance of achieving and maintaining positive relationships, business longevity, continued commitment and collaboration of teamwork.



- The facilitator is expected to successfully build an organizational change management plan and maintain its integrity, culture management is crucial.
- This training should be directed at outlining the need for such culture change management interventions and the benefits thereof by offering a shared set of norms, values, and beliefs.
- The foundation for interpersonal understanding and communication within the organization will also be provided for a significant impact on the organization's effectiveness, capacity to handle change, and ability to create an environment that will allow the company to accept and sustain change as well as adding value to tradition, self-discipline, dedication, and teamwork.

The Service Provider is expected to:

1. Gather information, identify and document current team dynamics, issues, and behaviours.
2. Highlight the importance of resolving current team dynamics, issues, and behaviours.
3. Encourage group morale for promotion of team building amid adversity.
4. Enhance appreciation of roles, goals, and group-established expectations.
5. Accelerate processes of team roles and improving of a shared vision.
6. Illustrate advantages of cooperation over competition.
7. Share the importance of meeting targets, timeously.
8. To ignite an increase in efficiency and emphasis on sharing knowledge and resources. Inspire communal support, team productivity, inter-departmental communication, and conflict resolution techniques.
9. Prompt inclusive decision making.
10. Identify possibilities in change.
11. Demonstrate ways to improve and uphold the INSETA values.
12. Inspire innovation and creativity.
13. Recommendations to Management on key areas of improvement based on the engagement survey results and potential areas of linkage of engagement to the INSETA strategy and Excellence Model
14. Recommendations on employee engagement initiatives and ideas; based on the data analysis and survey results
15. Develop a detailed 6 to 12 months' roadmap of interventions towards the implementation of the recommendations

3.3 **Research Methodology**

3.3.1 Delivery of a customised employee research survey aligned with industry trends.

- 3.3.2 The service provider must own or have access to proprietary research tool/s or methodology which is internationally accepted that provides clients with comprehensive insights on employee satisfaction and perception.
- 3.3.3 The service provider is to ensure that they have adequate resources to undertake the work under stringent timeframes.
- 3.3.4 The study should provide a comprehensive view on the key employee current views, summarising the methodology and results of the study using qualitative methods.
- 3.3.5 Develop a composite measure of employee satisfaction and use it to determine the overall rating of the current level of satisfaction.
- 3.3.6 Satisfaction with the INSETA should be measured across the following attributes:
 - Leadership
 - Vision
 - Remuneration
 - Benefits
 - Recruitment and selection
 - Responsiveness
 - Communication
- 3.3.7 Determine the quality of service delivery as perceived by INSETA employees.
- 3.3.8 Identify future intentions of participations by the Employees.
- 3.3.9 Identify gaps in service delivery.
- 3.3.10 Identify the sources of employee complaints/dissatisfaction in regard to service delivery.
- 3.3.11 Conduct an internal employee satisfaction survey and incorporate in the analysis of the result gathered from the internally conducted 'employee' satisfaction survey.
- 3.3.12 Propose service improvement measures.
- 3.3.13 Prepare and deliver a comprehensive report detailing the methodology, findings, challenges and recommendations from the assessment.

Exclusions

This is a full-research project to conduct a employee satisfaction index which should include all scope required for these kinds of projects in terms of best practice. There are no exclusions to the scope.

4. PROJECT PLAN

The service provider should provide a clear project plan, with very clear activities, time frames, relevant deliverables and costing.

5. DELIVERABLES

The service provider will be responsible for the following:

- 5.1 Develop and define the mode of data collection to be used
- 5.2 Project progress meetings(bi-monthly) in line with the project plan
- 5.3 Draft report on survey findings, challenges and recommendations on how to improve employee satisfaction in a manner which addresses employee concerns within the framework of INSETA's mandate.
- 5.4 Final report on findings and recommendations taking account the INSETA'S comments on draft report.
- 5.5 Highlights of the result of the survey in a PowerPoint format (soft copy only) and presentation of the results to the INSETA
- 5.6 Detailed report in 3 hard copies and in soft copy format
- 5.7 Recommendations to Management on key areas of improvement based on the engagement survey results and potential areas of linkage of engagement to the INSETA strategy and Excellence Model
- 5.8 Recommendations on employee engagement initiatives and ideas; based on the data analysis and survey results
- 5.9 Develop a detailed 6 to 12 months' roadmap of interventions towards the implementation of the recommendations
- 5.10 Present the findings of the report to the Executive Management Team

COSTING

The service provider must provide costing based on the pricing schedule table below. **Quotation must be on a company letterhead aligned the items listed below:**

NO:	DESCRIPTION (as per the scope work)	QUANTITY/ ESTIMATED HOURS	PRICE (excl. VAT)	PRICE (incl. VAT)
1.	All costs involved in conducting the research including planning, meetings, questionnaires, travel etc.		R	R
2.	Change Management facilitation in line with Excellence Model		R	R
3.	Motivate Employees		R	R

4.	Final Report and recommendations for improvement and implementation		R	R
SUB-TOTAL			R	
VAT (where applicable)			R	
GRAND TOTAL			R	

Service providers must endeavour to structure their pricing in terms of milestone payments.

These milestones must be structured in such a way that the deliverables are achievable and measurable. These milestones will be used as payment milestones once the deliverables have been signed off by the responsible project sponsor or owner. It will be in the bidder's best interest to structure the payment milestones in such a way that regular payments can be achieved.

Note: Service providers will be responsible for all costs; e.g. design and production of survey materials, third party payments, transportation and other disbursements for ALL activities/meetings associated with this quote and must include this cost in the pricing for this quote.

6. CONTRACT DURATION

6.1 The duration of the contract will be for a period of twenty four (24) months.

7. EVALUATIONS

7.1 PREQUALIFICATION CRITERIA (Phase 1)

- 7.1.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 7.1.2 Standard Bidding Document (SBD 4) Bidder's Disclosure.
- 7.1.3 SBD 6.1 Preference Points Claim form
- 7.1.4 General Conditions of Contract (GCC) initialed on each page.

7.2 MANDATORY CRITERIA (Phase 2)

- 7.2.1 Bidders must submit a valid Research accredited certification by the relevant body.
- 7.2.2 Bidders are requested to submit a Project Plan which clearly articulates how the project will be delivered. This Project Plan should project deliverables, their sub activities and planned dates / duration aligned to contract period.

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

- 7.2.3. Bidders are requested to submit a Project Plan which clearly articulates how the project will be delivered. This Project Plan should project deliverables, their sub activities and planned dates / duration aligned to contract period.
- 7.2.4. The bidder must provide profiles and CVs of key project team members, Project Manager, Technical Lead preferably with a Social Science and Statistics Masters qualification, advantageous PHD.
- 7.2.5. The bidder must provide 3 reference letters conducting organisational climate and or cultural survey or similar projects. Reference letters must be in company letterhead, dated and sign.

Note: All bidders who do not comply with the items listed above will be disqualified.

8. EVALUATION CRITERIA

POINTS AWARDED FOR PRICE AND SPECIFIC GOALS

The **80/20** preference point system

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

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

Pmin 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

B-BBEE PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

B-BBEE Status Level of contributor	Number of points 80/20 system
1	20
2	18

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3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 8.1.** 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.
- 8.2.** Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B- BBEE rating issued by SANAS.
- 8.3.** 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. 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's employees for the full duration of the contract.

11. CONTRACTUAL OBLIGATION

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The bidder will be required to comply with the following:

- 11.1 Signatory to SBD 7.2 contract form with the bidders approved submission as annexure to the contract.
- 11.2 For each service required the bidder will be required to accept a purchase order.
- 11.3 Compliance with the general conditions of contract.
- 11.4 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
- 11.5 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.
- 11.6 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (**upon parties contracting**).
- 11.7 Bidder must adhere to **Protection of Personal Information (POPI) Act**.

12. ADJUDICATION USING A POINT SYSTEM

- 12.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 12.2 Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 12.3 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.
- 12.4 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.
- 12.5 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

13. SPECIFIC GOALS POINTS WILL BE AWARDED AS FOLLOWS:

Table 1: Specific goals for this bid and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)



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.

- 13.1 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.
- 13.2 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.
- 13.3 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.
- 13.4 Bidders other than EME's 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.
- 13.5 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.

13.6 Consortium

- 13.6.1 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.
- 13.6.2 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.
- 13.6.3 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:

13.6.3.1 Lead Partner

- 13.6.3.1.1 All administrative documents (consortium agreement between the lead partner and the partner)
- 13.6.3.1.2 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)

13.6.3.2 Partner

- 13.6.3.2.1 Proof of CSD registration.
- 13.6.3.2.2 Tax Pin.
- 13.6.3.2.3 BBBEE Sworn-Affidavit.
- 13.6.3.2.4 SBD 4

13.6.4 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.

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

13.7 A joint venture

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

13.8 Unincorporated joint venture:

13.8.1 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.

- 13.8.1.1 SBD 4
- 13.8.1.2 SBD 6
- 13.8.1.3 Tax pin
- 13.8.1.4 CSD registration.
- 13.8.1.5 The JV agreement will direct which bank account of the two entities will be used.
- 13.8.1.6 Consolidated Joint BBBEE Certificate.



13.9 Incorporated joint venture

13.9.1 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.

13.9.2 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

13.9.2.1 SBD 4

13.9.2.2 SBD 6

13.9.2.3 Tax pin

13.9.2.4 CSD registration.

13.9.2.5 The JV agreement will direct which bank account of the two entities will be used.

13.9.2.6 Consolidated Joint BBBEE Certificate.

14. COMMUNIATION

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 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.**

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 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 **60 days** from the closing date of the BID Enquiry.

INSETA reserves the right to:

15.1 Not evaluate and award a bid that do not comply strictly with this BID document.

15.2 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.
- 15.3 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.
- 15.4 Cancel this BID at any time as prescribed in the PPPFA.
- 15.5 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the of cost effectiveness and the principle of value for money not necessarily on the basis of the lowest costs.

16. COST OF BIDDING

- 16.1 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.

17. NOTE TO BIDDERS:

Due diligence to be conducted by INSETA prior to the award of the contract – where applicable.

END OF DOCUMENT