



REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT PEOPLE MANAGEMENT TRAINING FOR TWELVE (12) MANAGERS

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| RFQ | RFQ/INS/2024/25/0078 |
| RFQ ISSUE DATE | 01 NOVEMBER 2024 |
| BRIEFING SESSION | N/A |
| RFQ DESCRIPTION | APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT PEOPLE MANAGEMENT TRAINING FOR TWELVE (12) MANAGERS |
| CLOSING DATE & TIME | 07 NOVEMBER 2024 @11:00 |
| 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: _____

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 People Management Training for twelve (12) Managers.
- 2.2 The objective of the training is to equip the attendees with the necessary skills to lead, motivate and develop teams through effective communication strategies and conflict management strategies.

3. DETAILED SPECIFICATION

- 3.1 The INSETA requires a service provider to conduct People Management Training for twelve (12) months.
- 3.2 The appointed Service Provider will liaise with the Human Resources Department in terms of coordination of the training.
- 3.3 The Service Provider will be required to meet the expected deliverables listed below, for the duration of the project.
- 3.4 The Service Provider will conduct the training at the INSETA office, 18 Fricker Road, Illovo within the official working hours (08h30-17h00)
- 3.5 The People Management Training should include but not limited to, the following focus areas:
- Team development and talent management.
 - Team motivation and empowerment.
 - Understanding team dynamics.
 - Appraising and rewarding performance.
 - Basic labour relations and conflict management at individual and team levels.
 - Managing and advocating organisational change in a team.
 - Planning and organising skills.
 - Utilising effective problem solving skills, interpersonal skills, such as communication and assertiveness.
 - Making sound and creative decisions.
 - Delegation.
 - Output and method improvement.

4. EXPECTED DELIVERABLES

- 4.1 The bidder must submit a detailed workplan for the project.
- 4.2 The training must be offered in one (1) day
- 4.3 The bidder must develop and submit a detailed course manual and all relevant material.

- 4.4 To develop and print all training manuals for the training
- 4.5 The Service Provider will conduct the training at the INSETA office , 18 Fricker Road, Illovo within the official working hours (08h30-17h00)
- 4.6 Conduct post-training evaluations and provide a detailed training report with recommendations.
- 4.7 Provide training completion certificates to participants.

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: Evaluation of Price and Specific Goals

6. ADMINISTRATIVE CRITERIA (Phase 0)

- a. Bidder must submit proof of registration on CSD (**Central Supplier Database**). Bidder must submit fully completed and signed bid documents.
- b. Standard Bidding Document (SBD 4) Bidder's Disclosure.
- c. SBD 6.1 Preference Points Claim form.
- d. General Conditions of Contract (GCC) initialled on each page.
- e. Bidder must provide BBEE Certificate (accredited by SANAS) or Sworn Affidavit (in as prescribed or CIPC or DTI template).
- f. Signed Request for Quotation (RFQ) form

7. MANDATORY CRITERIA (Phase 1)

- 7.1 The bidder must attach to their RFQ response at least two (2) contactable, signed and dated reference letters where People Management/Leadership training was conducted within the past five (5) years. Reference letters must be on the referee's letterhead.
- 7.2 The bidder must submit the proof of accreditation (of the company) with relevant SETA Or be part of a Institution of Higher Learning.

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

8. PRICE CONSIDERATION (Phase 2)

PRICING SCHEDULE

- 8.1.1 The service provider must provide a price quotation as per the scope of work.
8.1.2 The total cost must be including VAT and should be quoted in South African currency (i.e., Rands).

| ITEM | DESCRIPTION | QTY | UNIT PRICE | TOTAL PRICE |
|--------------------|----------------------------|-----|------------|-------------|
| 1 | People Management Training | 12 | | |
| Vat | | | | |
| Grand Total | | | | |

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, or a Purchase order has been issued.

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

The bidder will be required to comply with the following:

- 11.1 For each service required the bidder will be required to accept a purchase order.
11.2 Compliance with the general conditions of contract.
11.3 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
11.4 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.
11.5 **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 Specific Goals, the successful bid must be the one scoring the highest number of preference points for Specific Goals- 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 Specific Goals, the successful bid must be the one scoring the highest score for functionality.
- 12.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

13. POINTS AWARDED FOR PRICE AND PREFERENCE POINT

- (1) The following formula will be used to calculate the points out of 80 for price in respect of an invitation for a tender with a Rand value equal to or below R50 million, inclusive of all applicable taxes:

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

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 |

- (2) A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender.
- (3) The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.
- (4) Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

14. SPECIFIC GOALS POINTS WILL BE AWARDED AS FOLLOWS:

14.1 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.*

| 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) | Number of points claimed (90/10 system) (To be completed by the tenderer) | Number of points claimed (80/20 system) (To be completed by the tenderer) |
|--|---|---|---|---|
| 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 Service Providers: Emerging Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) – sworn affidavit (DTI or CIPC Template), Generic entities – B-BBEE certificate (SANAS accredited)

- 14.1.1 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.
- 14.1.2 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.
- 14.1.3 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.
- 14.1.4 Bidders other than EME's or QSE's must submit their original and valid B-BBEE status

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



level verification certificate and BBBEE Scorecard, substantiating their B-BBEE rating and black ownership issued by SANAS.

- 14.1.5 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.

14.2 Consortium

- 14.2.1 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.
- 14.2.2 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 endeavour, particularly the division of profits. A consortium is formed by contract, which delineates the rights and obligations of each member.
- 14.2.3 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 a RFQ/Bid process is such that the lead partner is identified, and the following requirements are required as follows:

14.2.3.1 Lead Partner

- 14.2.3.1.1 All administrative documents (consortium agreement between the lead partner and the partner)
- 14.2.3.1.2 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)

14.2.3.2 Partner

- 14.2.3.2.1 Proof of CSD registration.
- 14.2.3.2.2 Tax Pin.
- 14.2.3.2.3 BBBEE Sworn-Affidavit.
- 14.2.3.2.4 SBD 4
- 14.2.4 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.
- 14.2.5 Of importance is that in a consortium, each individual team members retain their identities.



14.3 **A joint venture**

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

14.4 **Unincorporated joint venture:**

14.4.1 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 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.

14.5 **Incorporated joint venture**

14.5.1 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.

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

- 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.

15. **COMMUNICATION**

15.1 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.**

16. 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:

- 16.1 Not evaluate and award a bid that do 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 preferred bidder(s) based on the criteria specified in the terms of reference.
- 16.3 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.
- 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 on the basis of the of cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

17. COST OF BIDDING

- 17.1 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.

18. NOTE TO BIDDERS:

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

END OF DOCUMENT