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BID NUMBER: TENDER-INS/2024/25/009

BID DESCRIPTION – APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO PROVIDE PUBLIC RELATIONS AND CRISIS MANAGEMENT TO INSETA FOR A PERIOD OF THREE (3) YEARS

Tender documents are obtainable from **05 November 2024** from the following websites:

- **ETender Portal**
- **INSETA Website**

Closing Date: 27 November 2024 at 11:00 am

Delivery: INSETA Office, 18 Fricker Road, Illovo, Sandton.

For enquiries contact the INSETA Supply Chain Management at bids@inseta.org.za



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INSURANCE SECTOR EDUCATION
AND TRAINING AUTHORITY

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TERMS OF REFERENCE

BID NUMBER: TENDER-INS/2024/25/009

**BID DESCRIPTION – APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO PROVIDE
PUBLIC RELATIONS AND CRISIS MANAGEMENT TO INSETA FOR A PERIOD OF THREE
(3) YEARS**

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 INSETA therefore is requiring suitability qualified service providers to provide a full suite of Public Relations and Crisis Management Services for a period of three (3) years as and when required.

2. SITUATIONAL ANALYSIS

- 2.1 The service provider will assist INSETA to create awareness and visibility of the Authority's mandate, services and for brand positioning. Furthermore, the service provider(s) are meant to build relations with key stakeholders, improve interaction and communication with all the stakeholders through various means including advertising, write speeches for various occasions and reputational management for INSETA.

3. SCOPE OF WORK

Details of the requirements are listed below:

- 3.1. Targeted media buying and advert placement (Print, radio and TV).
- 3.2. Public Relations (Press Releases, coaching, content development).
- 3.3. Organise press briefings.
- 3.4. Technical speech writing.
- 3.5. The following are key deliverables for the service providers:**
 - 3.5.1. Undertake negotiations with media owners/media houses to secure the most cost-effective and impactful media partnerships that create added value to the INSETA brand.
 - 3.5.2. Book targeted media space and place advertisements or advertorials or notices and announcement on behalf of INSETA.
 - 3.5.3. Produce targeted media schedules for agreed campaigns and activities.
 - 3.5.4. Ensure that the targeted placements appear in publications and/or broadcast media; and provide proof of these placements.
 - 3.5.5. Able to respond to short turnaround times and booking requests.

- 3.5.6. Provide electronic versions of all approved content for uploading on INSETA website and social media platforms within three (3) days of the advertisement being approved. The produced content must be provided to INSETA as an open file.
- 3.5.7. All artwork to be designed and submitted to INSETA for approval.
- 3.5.8. Advise the INSETA on relevant content development.
- 3.5.9. Service providers must be able to respond with an actionable plan within 24 hours on all Crisis Communication Management.
- 3.5.10. Provide coaching on Crisis Communication Management techniques as and when required.
- 3.5.11. Organise press briefings as and when required.
- 3.5.12. Provide monthly media analysis reports.
- 3.5.13. Organisational scanning and development of a responsive Public Relations Strategy.
- 3.5.14. Post crisis recovery - guide the organisation through the recovery and rebuilding efforts helping to restore trust and credibility.

4 CONTRACTUAL OBLIGATION

- 4.1 Bidders to fully complete Annexure A - SBD 3.3: Pricing schedule, with a fixed total price including all applicable taxes, price must be inclusive of VAT.
- 4.2 In a case where the service provider uses sub-contractors, the former will be responsible for ensuring delivery of services and payment for such sub-contractors.
- 4.3 The successful bidder should have adequate professional indemnity, liability and business interruption insurance in place (upon parties contracting).
- 4.4 Bidders should fully comply with the relevant SCM Legislative Framework as well as application of regulatory prescripts. Bidders are also required to take all reasonable steps to protect information, in line with the provisions of the POPIA.

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.
- 5.2 **The Contract site is at INSETA offices at 18 Fricker Road, Illovo, Sandton, 2196 (24/7).**

6 WORKMEN AND SUPERVISION ON SITE

- 6.1 The service provider shall be held responsible for the conduct of its employees and the conduct of its sub-contractor's employees for the full duration of the contract.

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7 EVALUATION CRITERIA

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

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

- Phase 0: Administrative requirements
- Phase 1: Mandatory requirements
- Phase 2: Technical Functionality (100 points) – The threshold of 70 points
- Phase 3: Evaluation on Price and Specific Goals

8 ADMINISTRATIVE REQUIREMENTS (Phase 0)

8.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).

Bidder must complete, sign and submit:

- 8.2 Standard Bidding Document (SBD 1) Procurement Invitation.
- 8.3 Standard Bidding Document 3.3 (Annexure A – Pricing Schedule)
- 8.4 Standard Bidding Document (SBD 4) Bidder's Disclosure.
- 8.5 SBD 6.1 Preference Points Claim form in terms of Preferential Procurement Regulation 2022.
- 8.6 General Conditions of Contract (GCC) initialled on each page by the bidder.
- 8.7 Bidder must provide BBBEE Certificate (accredited by SANAS) or Sworn Affidavit (in as prescribed or CIPC or DTI template).

9 MANDATORY REQUIREMENTS (Phase 1)

The following compulsory requirements must be submitted:

9.1 The bidder/ service provider must be an active member or registered with a professional body (PRISA), which is not limited to (valid proof of PRISA accreditation must be submitted).

- **Non-compliance with the above-mentioned compulsory requirements will mean automatic disqualification.**
- **Only bidders who submit the compulsory requirements as prescribed will be considered for further evaluation Phase 2 – Functional Evaluation.**

10 FUNCTIONAL EVALUATION CRITERIA (Phase 2)

10.1 The tender submission will be functionally evaluated out of **100 points on Phase 2 –any bidder who scores less than 70** will not be considered for further evaluation (Phase 3)

Evaluation Area	Evaluation Criterion	Points
Bidder Experience	<p>The bidder must provide evidence in the form of reference letters for Public Relations work done in the past three (3) years. The reference letters must be accompanied by either a Purchase Orders (PO) or Appointment letters that align with the submitted reference letters. The reference letters must be on the company letterhead of the referee, signed, dated, and must have contactable detail(s).</p> <ul style="list-style-type: none"> • 4 or more reference letters and Purchase Orders (PO) or Appointment letters that align with the submitted reference letters = 30 points • 3 reference letters and Purchase Orders (PO) or Appointment letters that align with the submitted reference letters = 20 points • 2 reference letters and Purchase Orders (PO) or Appointment letters that align with the submitted reference letters = 10 points • 1 reference letter and Purchase Order (PO) or Appointment letter that align with the submitted reference letters = 5 points • Non-compliance reference letters/no reference letters submitted with Purchase Order (PO) or Appointment letter that align with the submitted reference letters = 0 points <p>Bidders to note that due diligence will be conducted against received references.</p>	30
Approach and methodology. The bidder must demonstrate the turnaround time in terms of response and delivery of services.	<p>The Bidder must provide an actionable proposal with a project plan and demonstrate clear turnaround times in terms of project timelines, approach and methodology for crisis communication management.</p> <p>Project plan</p> <ul style="list-style-type: none"> • A detailed project plan is submitted and falls within the INSETA stipulated time frames (24 hours) for crisis communication management = 10 points 	20



	<ul style="list-style-type: none"> A detailed project plan is submitted, and timeframes are outside INSETA stipulated timeframes (more than 24 hours) = 0 points <p>Approach and methodology</p> <ul style="list-style-type: none"> A detailed approach and methodology aligned to crisis communication management = 10 points No approach and methodology is submitted or the approach and methodology submitted is generic and is not aligned to crisis communication management = 0 points 	
Company profile	<p>The bidder must provide a written Company Profile highlighting the bidder/company's capabilities and experience in line with public relations and crisis communication management</p> <ul style="list-style-type: none"> Company profile highlighting 5 or more years' experience and bidder's capabilities in line with public relations and crisis communication management = 20 points Company profile highlighting 3-4 years' experience and bidder's capabilities in line with public relations and crisis communication management = 15 points Company profile highlighting 1-2 years' experience and bidder's capabilities in line with public relations and crisis communication management = 10 points Company profile highlighting less than 1 year experience and bidder's capabilities in line with public relations and crisis communication management/no company profile submitted = 0 points 	20



<p>Qualifications of the Project Manager</p>	<p>The bidder must provide a dedicated Project Manager Curriculum Vitae (CV) who has qualification(s) in Public Relations/ Communication/Journalism/ Public Administration/Public Management/Business Administration.</p> <ul style="list-style-type: none"> ✓ A minimum of NQF level 8 (Master's degree will be added as an advantage) ✓ At least 5 years' experience in providing crisis management and communication. ✓ The Project Manager's CV must be accompanied by qualification(s) in Public Relations/ Communication/Journalism/Public Administration/Public Management/Business Administration <ul style="list-style-type: none"> • Project Manager with 11 years and above experience in crisis management and communications with a minimum of NQF level 8 in Public Relations/ Communication/ Journalism/ Public Administration/ Public Management/Business Administration = 30 Points • Project Manager with 9 - 10 years' experience in crisis management and communications with a minimum of NQF level 8 in Public Relations/ Communication/Journalism/ Public Administration/Public Management/Business Administration = 25 Points • Project Manager with 7 - 8 years' experience in crisis management and communications with a minimum of NQF level 8 in Public Relations/ Communication/Journalism/ Public Administration/Public Management/Business Administration = 20 Points • Project Manager with 5 - 6 years' experience in crisis management and communications with a minimum of NQF level 8 in Public Relations/ Communication/Journalism/ Public Administration/Public Management/Business Administration = 15 Points • Project Manager with less than 5 years' experience in crisis management and communications with a minimum of NQF level 8 in Public Relations/ Communication/Journalism/ Public Administration/Public Management/Business Administration = 0 Points 	<p>30</p>
<p>TOTAL</p>		<p>100</p>

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- 10.2 Bidders are required to pass the minimum threshold of **70 points** on the functional criteria to be evaluated for the final **phase 3** which is Price and Specific goals.
- 10.3 Bidders who score less than **70 points** will not be considered for the final phase, thus be disqualified, and will be declared non-responsive.

11 PRICE AND SPECIFIC POINTS EVALUATION

11.1 Preference Points Applied Against Specific Goals

The tender responses will be evaluated on the **80/20 preference point system for acquisition of goods or services with Rand value equal to or below R50 million.**

- The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.
- Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
 - a) Price; and
 - b) Specific Goals.

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

12 POINTS AWARDED FOR PRICE AND PREFERENCE POINTS

- (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.

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(4) Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

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 **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 (80/20-point system)
Black Ownership <ul style="list-style-type: none"> 6 points for 100% black owned 3 points for 75-99% black owned 1 point for 51-74% black owned 	(Maximum points = 6 points)
Women Ownership <ul style="list-style-type: none"> 6 points for 75% - 100% 3 points for 51% - 74% 1 point for below 51% 	(Maximum points = 6 points)
Youth Ownership <ul style="list-style-type: none"> 5 points for 75% - 100% 3 points for 51% - 74% 1 point for Below 51% 	(Maximum points = 5 points)
Company-owned by People with disabilities <ul style="list-style-type: none"> 3 points 	(Maximum points = 3 points)
Total	20

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) and CSD report.

13.3 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.

13.4 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.

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14 Bid Procedure Conditions: Counter Conditions

13.1. Award Criteria:

- 13.1.1. INSETA reserves the right to screen the bidder in terms of its own Bid Evaluation Committee (BEC) before appointment, should such screening results have a negative outcome, the INSETA reserves the right not to award the bid to the subjected/recommended/highest scoring bidder.
- 13.1.2. The INSETA reserve a right not to award a bid to the highest scoring bidder but to award to a service provider who meet the requirement fully.
- 13.1.3. INSETA reserve a right to conduct due diligence to confirm the contactable reference letters / reference documents provided. The due diligence method will be determined by the INSETA which may include requesting reference letters from the referee.
- 13.1.4. The INSETA draws the bidders' attention that amendments to any of the Bid Conditions or setting of counter conditions by bidders will result in the invalidation of such bids.
- 13.1.5. Non-disclose agreement will be signed between INSETA and the appointed panel of service provider(s).
- 13.1.6. **Only the first three (3) highest scoring service providers evaluated on criteria 3 – Price and Specific Goals will be eligible for appointment (RFQ will be issued to the panel as and when a need arises).**

15 When bidding as the following:

15.1 Consortium

- 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.
- 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.
- 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:

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 fulfils the requirements of the bid through combination of skills)



b) Partner

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

15.2 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.

15.3 Unincorporated joint venture:

- 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
 - 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.

15.4 Incorporated joint venture:

- 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



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- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

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

INSETA reserves the right to:

- 17.2 Not evaluate and award a bid that do not comply strictly with this BID document.
- 17.3 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.
- 17.4 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.
- 17.5 Cancel this BID at any time as prescribed in the PPPFA.
- 17.6 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the cost effectiveness and the principal 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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