

REQUEST FOR QUOTATION (RFQ):

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A CHANGE MANAGEMENT FACILITATION PROCESS FOR PURPOSES OF INTEGRATING THE OQSF INTO INSETA OPERATIONS FOR A PERIOD OF SIX (06) MONTHS.

RFQ	RFQ/INS/2024/2025/0122
RFQ ISSUE DATE	25 MARCH 2025
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A CHANGE MANAGEMENT FACILITATION AND TRAINING FOR THE INSETA FOR A PERIOD OF SIX (06) MONTHS
CLOSING DATE & TIME	28th MARCH 2025 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: _____

EMAIL 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)

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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.
- 1.2 The primary purpose of the change management process is to gain knowledge and implement transitional requirements to integrate the Occupational Qualification Sub-Framework (OQSF) into INSETA operational processes.
- 1.3 The INSETA has 140 employees and seeks to appoint a competent, capable, and experienced service provider to conduct a change management facilitation in line with the Occupational Qualification Sub-Framework (OQSF) as per the QCTO and INSETA Service Level Agreement.

2. PURPOSE AND OBJECTIVES

- 2.1 The purpose of this RFQ is to appoint a Service Provider who will guide the implementation of a change management process to integrate the OQSF into INSETA operations and move from implementing Legacy Learnerships to Occupational Qualifications. The process may include identifying employees whose roles may change, employees requiring training, and new systems that need to be implemented. Based on the findings, this project will also support and guide the implementation of change management strategies to integrate the OQSF for the implementation of Occupational Qualifications.

3. SCOPE OF WORK

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

- 3.1. Developing a change strategy that addresses and identifies key stakeholders for change, and providing necessary training or resources.
- 3.2. Identify opportunities for growth, career progression, and skill-building for employees within INSETA.
- 3.3. Creating and implementing communication plans for this change management process.
- 3.4. Provide a structured methodology that will be used to facilitate the adoption of the necessary changes.
- 3.5. Produce a comprehensive report including recommendations and the change management implementation plan
- 3.6. Conduct a PowerPoint feedback/reporting session to Executives and Staff (These PowerPoint presentations will become the property of INSETA)

4. DELIVERABLES

- 4.1 The Service provider must provide a clear, detailed project plan, activities, and time frames.
- 4.2 Conduct general management and staff feedback sessions.
- 4.3 Produce a Preliminary Change Management Report
- 4.4 Conduct a PowerPoint feedback session with the Executive and Staff (These PowerPoint feedback sessions with the Executives and Staff
- 4.5 Produce a comprehensive final report including recommendations and change management implementation plan.
- 4.6 Design, develop, and manage the implementation of a change management process.
- 4.7 Regular feedback sessions will be held throughout the change management process to ensure the involvement of key stakeholders and alignment with organisational needs.
- 4.8 To develop a clear action plan based on survey results that outlines necessary changes and improvements.
- 4.9 To create a roadmap for implementing change management initiatives that align with the lessons learned.
- 4.10 The platforms must be able to be used by INSETA to engage its employees (but not limited to) the website and Employee Information System, staff engagement sessions/ general meetings.
- 4.11 The facilitator is expected to successfully build an organisation change management plan and maintain its integrity, culture management is crucial.

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- 4.12 Provide an assessment report on the affected employee's understanding of the daily deliverables and impact towards the achievement of INSETA's objectives.
- 4.13 Close-out Report (brief report to be submitted at the end of the contract period, a reflection on all the advisory and support activities conducted, lessons learned from these, and proposed next steps)

5. COSTING

- 5.1 The service provider must provide costing based on the pricing schedule table below. Service providers must ensure that the price quotations are inclusive of all applicable taxes(**Including VAT**).

NO:	DESCRIPTION (as per the scope work)	UNIT PRICE (incl. VAT)
1.	<p>Initiation - Project Planning</p> <ul style="list-style-type: none"> ➤ Design, develop, Report, and manage the implementation of a change management process. 	R
2.	<p>Planning, Implementation, Deliverables, and Milestones</p> <ul style="list-style-type: none"> ➤ Produce Preliminary Change Management Report ➤ Conduct a PowerPoint feedback Session with the Executives and Staff (These PowerPoint presentations become the property of INSETA ➤ The facilitator is expected to successfully build an organisation change management plan and maintain its integrity, culture management is crucial. ➤ Create a roadmap for implementing change management initiatives that align with the lessons learned. ➤ Develop a clear action plan based on survey results that outlines necessary changes and improvements. 	R

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NO:	DESCRIPTION (as per the scope work)	UNIT PRICE (incl. VAT)
3.	<p>Project Closure Report</p> <ul style="list-style-type: none"> ➤ Conduct general management and staff feedback sessions. ➤ Provide an assessment report on the affected employee's understanding of the daily deliverables and impact towards achievement of the INSETA's objectives. ➤ Produce a comprehensive final report including recommendations and change management implementation plan. ➤ Close-out Report (brief report to be submitted at the end of the contract period reflecting on all the advisory and support activities conducted, lessons learned from these, and proposed next steps) 	R
4.	(travel costs, As per SARS Rates)	
TOTAL COST		
GRAND TOTAL COST (VAT Inclusive)		

5.2 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.

6. CONTRACT DURATION

6.1 The duration of the contract will be for a period of Six (06) months.

6.2 Data will be treated with the highest confidentiality, with aggregated findings being shared at a group level to protect individual privacy.

7. EVALUATIONS

7.1. ADMINISTRATIVE CRITERIA (Phase 1)

- 7.1.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 7.1.2 Bidder must submit fully completed and signed bid documents:
- 7.1.3 Standard Bidding Document (SBD 4) Bidder's Disclosure.
- 7.1.4 SBD 6.1 Preference Points Claim form
- 7.1.5 Signed Request for Quotation (RFQ) form.
- 7.1.6 General Conditions of Contract (GCC) initialed on each page.

7.2. MANDATORY CRITERIA (Phase 2)

- 7.2.1 The Service Provider must provide a clear project plan, with very clear activities and time frames.
- 7.2.2 Bidder must provide a minimum of (3)three references from similar projects conducted in the past five years (5), the letters must be on the company letterhead, dated, signed, and contactable details.

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

8. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 8.1 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.
- 8.2 The Contract site is at INSETA (as and when required).

9. WORKMEN AND SUPERVISION ON-SITE

- 9.1 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.



10. CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 10.1 Signatory to SBD 7.2 contract form with the bidder's approved submission as annexure to the contract.
- 10.2 For each service required, the bidder will be required to accept a purchase order.
- 10.3 Compliance with the general conditions of the contract.
- 10.4 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
- 10.5 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.
- 10.6 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (**upon parties contracting**).

Bidder must adhere to the Protection of Personal Information (POPI) Act.

9. ADJUDICATION USING A POINT SYSTEM

- 10.1. The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 10.2. Preference points shall be calculated after the process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 10.3. In the event that two or more bids have scored equal points in terms of price and preference points for BBEE, the successful bid must be the one scoring the highest number of preference points for BBEE - in terms of PPPFA Act 5 of 2000.
- 10.4. However, when functionality is part of the evaluation process and two or more bids have scored equal points for BBEE, the successful bid must be the one scoring the highest score for functionality.
- 10.4. Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

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11. SPECIFIC GOAL 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.

- 11.4. 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.
- 11.5. 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 regarding preferences, in any manner required by the organ of state.
- 11.6. 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 offence.
- 11.7. Bidders other than EMEs or QSEs 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.
- 11.8. 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.
- 11.9. Consortium**
- 11.10. 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.
- 11.11. 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 delineates the rights and obligations of each member.
- 11.12. 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:

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11.12.1.1. Lead Partner

11.12.1.1.1. All administrative documents (consortium agreement between the lead partner and the partner)

11.12.1.1.2. Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intents and purposes fulfills the requirements of the bid through a combination of skills)

11.12.1.2. Partner

11.12.1.2.1. Proof of CSD registration.

11.12.1.2.2. Tax Pin.

11.12.1.2.3. BBBEE Sworn-Affidavit.

11.12.1.2.4. SBD 4

11.12.2. 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.

11.12.3. Of importance is that in a consortium, each individual team members retain their identity.

11.13. A joint venture

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

11.14. Unincorporated joint venture:

11.14.1. 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.

11.14.1.1. SBD 4

11.14.1.2. SBD 6

- 11.14.1.3. Tax pin
- 11.14.1.4. CSD registration.
- 11.14.1.5. The JV agreement will direct which bank account of the two entities will be used.
- 11.14.1.6. Consolidated Joint BBBEE Certificate.

11.15. Incorporated joint venture

- 11.15.1. 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.
- 11.15.2. 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
 - 11.15.2.1. SBD 4
 - 11.15.2.2. SBD 6
 - 11.15.2.3. Tax pin
 - 11.15.2.4. CSD registration.
 - 11.15.2.5. The JV agreement will direct which bank account of the two entities will be used.
 - 11.15.2.6. Consolidated Joint BBBEE Certificate.

12. COMMUNICATION

- 12.4. 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.**

13. 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 **60**



days from the closing date of the BID Enquiry.

INSETA reserves the right to:

- 13.4. Do not evaluate and award a bid that does not comply strictly with this BID document.
- 13.5. 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.
- 13.6. 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.
- 13.7. Cancel this BID at any time as prescribed in the PPPFA.
- 13.8. Should bidder(s) be selected for further negotiations, they will be chosen on the basis of cost-effectiveness and the principle of value for money not necessarily on the basis of the lowest costs.

14. COST OF BIDDING

- 14.4. 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.

15. NOTE TO BIDDERS:

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

END OF DOCUMENT