

RFQ REQUEST FOR QUOTATION

APPOINTMENT OF A SUITABLY QUALIFIED SERVICE PROVIDER TO PROVIDE PSYCHOMETRIC ASSESSMENT AND BACKGROUND CHECKS (AS AND WHEN REQUIRED) FOR A PERIOD OF 36 MONTHS.

RFQ	RFQ/INS/2024/2025/0114
RFQ ISSUE DATE	05 th MARCH 2025
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SUITABLY QUALIFIED SERVICE PROVIDER TO PROVIDE PSYCHOMETRIC ASSESSMENT AND BACKGROUND CHECKS (AS AND WHEN REQUIRED) FOR A PERIOD OF 36 MONTHS.
CLOSING DATE & TIME	11 th MARCH 2025 at 11:00 am – Late submission will not be considered.
LOCATION FOR SUBMISSIONS	via e-mail at: 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 NUMBER: _____

BIDDER SIGNATURE: _____

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 line 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 service provider for the provision of psychometric assessment and background checks (as and when required) for a period of 36 months.
- 1.3. The objective of this request is to appoint a panel of professional and accredited service provider(s) to conduct psychometric assessments and background checks of new INSETA candidates (as and when required) for a period of 24 months.

2. SCOPE OF WORK

- 2.1 Bidders are required to provide a detailed methodology including clear turn-around times for the completion and submission of background checks (**maximum 48 hours**) including the recommendation report, and report on Psychometric Assessment (**maximum of 5 days**) including the assessment recommendation report.
- 2.2 Background and Screening Check must be in consisting of the following:
 - 2.2.2 Qualification Verification
 - 2.2.3 Criminal record checks – Fingerprint
 - 2.2.4 Credit checks
 - 2.2.5 Previous employment history and reference checks
 - 2.2.6 Identity checks
- 2.3 Psychometric assessments must be conducted consisting of the following:
 - 2.3.2 Fifteen Factor Personality Questionnaire (15FQ)
 - 2.3.3 Work-related Risk and Integrity Scale (WRISc)
 - 2.3.4 Cognitive Process Profile (CPP)
- 2.4 General Assessment must consist of the following.
 - 2.4.2 Integrity
 - 2.4.3 Problem Solving
 - 2.4.4 Resilience and Drive

- 2.4.5 Innovation and Resourcefulness
- 2.4.6 Empowering Self and Others
- 2.4.7 Leadership skills
- 2.4.8 Delivery orientation

3. CONTRACT DURATION

- 3.1. The contract will be for a period of three(3) years.

4. EVALUATIONS: PREQUALIFICATION CRITERIA (Phase 1)

- 4.1. Bidder must submit proof of registration on CSD (Central Supplier Database).
- 4.2. Bidder must submit fully completed and signed bid documents:
 - 4.2.1. Standard Bidding Document (SBD 4) Bidder's Disclosure.
 - 4.2.2. SBD 6.1 Preference Points Claim Form.
 - 4.2.3. Signed Request for Quotation (RFQ) form.
- 4.3. General Conditions of Contract (GCC) initiated on each page.

5. MANDATORY CRITERIA (Phase 2)

- 5.1. The bidder must provide proof of experience in undertaking Background Checks and Psychometric Assessments in at least three companies with contactable references. Bidder to provide a minimum of 3 reference letters. The reference letters must not be older than five years.

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

6. PRICE CONSIDERATION (Phase 3)

- 6.1 Service providers must ensure that the price quotations include all applicable taxes (including VAT). Costing must comprise all the relevant services proposed in the bidder submission.
- 6.2 Quotation on company letterhead aligned the items listed below:



Description (As per scope of work)		Quantity	Unit Prices including VAT (where applicable)
Background checks including reports			
1.	Identity checks	1	R
2.	Academic Qualifications (Matric Pre- 1992)	1	
3.	Academic Qualifications (Matric Post - 1992)	1	
4.	South African University Qualifications	1	
5.	Academic Qualifications (Global)	1	
6.	TVET Colleges	1	
7.	Credit checks (Consumer credit profile) Each	1	
8.	Credit checks (Consumer credit profile) All	1	
9.	Criminal checks – Fingerprint	1	
10.	Credit checks (Consumer credit profile) Each	1	
11.	Credit checks (Consumer credit profile) All	1	
12.	Employment check - History SA Only	1	
13.	Employment check - History SA with Characteristic reference	1	
14.	Fingerprint Zone - Candidate Contact	1	
15.	Work-related Risk and Integrity Scale (WRISc)	1	
16.	Cognitive Process Profile (CPP)	1	
17.	Emotional Quotient Inventory 2.0 (EQ-I 2.0)	1	
18.	Comparison report of candidates (Excel report comparing all the applicants related to a specific vacancy, comparing the different assessments.	1	
19.	Personal Feedback Session from Psychometrics	1	

NB* - Qualification verifications attract additional supplier costs that are not included in the above pricing for MIE. When requesting quotations, the final prices will be considered to make an appointment. This applies to **(Academic Qualifications (Matric Pre- 1992), Academic Qualifications (Matric Post - 1992), South African University Qualifications, and Academic Qualifications (Global), TVET Colleges**

7. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 7.1. 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.
- 7.2. The Contract site is at INSETA (as and when required).

8. WORKMEN AND SUPERVISION ON-SITE

- 8.1. 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

9. CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 9.1. Signatory to SBD 7.2 contract form with the bidders' approved submission as annexure to the contract.
- 9.2. For each service required, the bidder will be required to accept a purchase order.
- 9.3. Compliance with the general conditions of contract.
- 9.4. Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
- 9.5. 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.
- 9.6. The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (upon parties contracting).
- 9.7. Bidder must adhere to the Protection of Personal Information (POPI) Act.

10. 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 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.
- 10.4 However, when functionality is part of the evaluation process and two or more bids have

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scored equal points for BBEE, the successful bid must be the one scoring the highest score for functionality.

10.5 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

11. SPECIFIC GOALS/POINTS FOR THIS BID WILL BE AWARDED AS FOLLOWS:

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)

- 11.1 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.
- 11.2 The organ of the 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 the state.
- 11.3 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 offence.
- 11.4 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.
- 11.5 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.
- 11.6 Consortium
- 11.6.1 A consortium is an association of two or more individuals, companies, organisations, or governments (or any combination of these entities) to participate in a common activity or pool their resources for achieving a common goal.
- 11.6.2A consortium requires that each participant retains its separate legal status and the consortium's control over each participant is generally limited to activities involving



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the joint endeavor, particularly the division of profits. A consortium is formed by contract, which delegates the rights and obligations of each member.

11.6.3 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 an RFQ/Bid process are such that the lead partner is identified and the requirements are as follows:

11.6.3.1 Lead Partner

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

11.6.3.1.2 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)

11.6.3.2 Partner

11.6.3.2.1 Proof of CSD registration

11.6.3.2.2 Tax Pin

11.6.3.2.3 BBBEE Sworn-Affidavit

11.6.3.2.4 SBD 4

11.6.4 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 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.

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

11.7 A joint venture

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

11.8 Unincorporated joint venture:

11.8.1 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:

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11.8.1.1 SBD 4

11.8.1.2 SBD 6

11.8.1.3 Tax pin

11.8.1.4 CSD registration

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

11.8.1.6 Consolidated Joint BBBEE Certificate.

11.9 Incorporated joint venture

11.9.1 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. The required compliance documents must be completed with the name of the entity/company, and the name of the joint venture, and the following will be required amongst others:

11.9.1.1 SBD 4

11.9.1.2 SBD 6

11.9.1.3 Tax pin

11.9.1.4 CSD registration

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

11.9.1.6 Consolidated Joint BBBEE Certificate.

12. COMMUNICATION

12.1. 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 the 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(3) days before the closing date**.

13. CONDITIONS TO BE OBSERVED WHEN BIDDING

13.1. 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 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 competitive Bid 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:



- 13.1.1. Do not evaluate and award a bid that does not comply strictly with this BID document.
- 13.1.2. 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.
- 13.1.3. 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.
- 13.1.4. Cancel this BID at any time as prescribed in the PPPFA.
- 13.1.5. Should bidder(s) be selected for further negotiations, they will be chosen based on cost-effectiveness and the principle of value for money not necessarily based on the lowest costs.

14. COST OF BIDDING

- 14.1. 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

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

END OF DOCUMENT