

TERMS OF REFERENCE

DESCRIPTION

BID NUMBER: TENDER-INS/2024/25/016

BID – APPOINTMENT OF A SERVICE PROVIDER TO MANAGE AND EXECUTE INSETA EVENTS AS AND WHEN REQUIRED FOR A PERIOD OF EIGHTEEN (18) MONTHS.

Tender documents are obtainable from 28 March 2025 from the following websites:

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

Closing Date: 24th April 2025 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

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 Therefore, INSETA requires a suitable and experienced service provider for events management to manage and execute INSETA events as and when required for a period of eighteen (18) months.

2. SITUATION ANALYSIS

2.1 INSETA currently utilizes the SCM RFQ process for events management as and when required. The appointed service provider will be expected to make recommendations in respect of planned INSETA events.

3. SCOPE OF WORK

INSETA requires services of an established and reputable events management company to manage and execute the following services, but not limited to:

- 3.1 Event conceptualisation (planning and management)
- 3.2 Undertake detailed planning for all INSETA events, ensuring that they all comply with INSETA's safety and security requirements
- 3.3 Take out public liability insurance and compliance certificates or documents for all planned events
- 3.4 Sourcing of venues and set up requirements (stage management, lighting, security etc.)
- 3.5 Sourcing of decor and furniture hire (where necessary)
- 3.6 Sourcing of audio-visual equipment hire and set up requirements
- 3.7 Sourcing and coordinate special protection requirements for VIPs (Where necessary)

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- 3.8 Sourcing of catering requirements (where necessary)
- 3.9 Designing and coordination of branding and signage collateral for each event
- 3.10 Event promotion through radio, television, print, and social media
- 3.11 Sourcing of promotional branded corporate gifts
- 3.12 Sourcing and managing the automated registration and accreditation services (design & print invitations and accreditation cards)
- 3.13 Management of invitations and RSVP (including VIP, media, etc.)
- 3.14 Source entertainment (specification to be provided for each event)
- 3.15 Source guest speakers and Master of ceremonies (MC's) (where necessary)
- 3.16 Source exhibition shell schemes, size dependent (where necessary)
- 3.17 Source and manage transport requirements (where necessary)
- 3.18 Be able to negotiate cost on behalf of INSETA with third-party agents/service providers
- 3.19 Coordinate and prepare information packs (where necessary)
- 3.20 Provide full technical and production support for strategic events identified by INSETA.
(Insurance Indaba, Research Colloquium, Annual General Meeting, Gala Dinner, etc.)
- 3.21 Automated RSVP and Guest Accreditation Systems

4. TIMEFRAMES

The duration of the contract will be for a period of Eighteen (18) Months from the signing of the contract.

5. CONTRACTUAL OBLIGATION

- 5.1 Bidders to fully complete **SBD 3.3** including all applicable costs.
- 5.2 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.
- 5.3 **Bidder will be subjected to a performance review after each event.**
- 5.4 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (**upon parties contracting**).
- 5.5 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as the application of regulatory and prescripts. Bidders are also required to take all

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reasonable steps to protect information, in line with the provisions of the POPIA 4 of 2014.

- 5.6** An alternate replacement of resource(s) should be equal or more competent to the initial approved resource(s).

6. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 6.1** 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.
- 6.2** The Contract site is at **INSETA, 18 Fricker Road, Illovo Sandton 2196**. The appointed events management service provider will from time to time be required to work at any of INSETA's operational premises. In some instances, where necessary, work may be extended to where events are being held outside INSETA premises.

7. WORKMEN AND SUPERVISION ON SITE

- 7.1** 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.

8. ADMINISTRATIVE CRITERIA (Phase 1)

- 8.1** Proof of registration on CSD (**Central Supplier Database**).
- 8.2** Submission of a complete, sign and submit and **Standard Bid Document (SBD) 4 – Bidder disclosure**.
- 8.3** *Submission of a complete, sign and submit and **Standard Bid Document (SBD) 6.1 – Specific goals**.*
- 8.4** Bidder must *provide* a **BBBEE Certificate (accredited by SANAS only) or Sworn Affidavit (as prescribed by CIPC or DTI template)**.

9. EVALUATION CRITERIA

- 9.1** Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria is 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.

9.2 Functional Evaluation threshold (Phase 2)

11.4.1 The tender submission will be functionally evaluated out of a **maximum of 100 points** – any bidder who scores less than **80** will not be considered for further evaluation (Phase 3), the **maximum score is 100 for PRICE AND SPECIFIC GOALS.**

9.3 Functional Evaluation Criteria Phase 2:

Evaluation Area	Evaluation Criterion	Points
<p>1. Bidder Experience</p>	<p>The bidder must provide evidence in the form of reference letters for events managed in the past three (3) years. The reference letters must be accompanied by either a Purchase Order (PO) or Contract/Service Level Agreement (SLA) or Appointment letter that is aligned with the submitted reference letters. The reference letters must be on the company letterhead of the referee, signed, dated, and must have a contactable email address.</p> <p>At least 5 years' company operational experience reflected on the reference letter in the field of:</p> <ol style="list-style-type: none"> 1) Concept development 2) Have planned events/ Conferences with over 500 attendees Nationally <p>Points to be allocated:</p> <p>5 and above reference letters of similar completed projects in the past 3 years = 35 points</p> <p>Minimum of 3-4 reference letters of similar completed projects in the past 3 years = 20 points</p> <p>Bidder to provide Portfolio of Evidence (POE) of a minimum of three (3) completed events in a digital format submitted with the bid = 5 points</p> <p>Non-compliance with the minimum criteria = 0 points</p>	<p>40</p>

<p>2. Project Plan</p>	<p>The bidder must provide an example of a high-level project plan that has been executed before. It should demonstrate the project overview and objectives, project scope, work breakdown structure, and any key processes that were undertaken to achieve the objectives of the event. The following must be included in the bidder's high-level project plan:</p> <p>Project overview and objectives = 10 Points Project scope = 10 Points Work breakdown structure = 10 Points Key processes and plans (communication plan, risk management plan etc.) = 10 Points</p> <p>Non-compliance with the minimum criteria = 0 points</p>	<p>40</p>
<p>3. Dedicated Project Manager</p>	<p>Bidder to provide a dedicated Project Manager Curriculum Vitae (CV) with proof of years of relevant experience (with relevant experience and expertise in providing project management services) with a minimum of NQF level 6 qualification.</p> <p>At least 5 years experience in providing required project management services</p> <p>Project Manager:</p> <p>The Project Manager's CV must reflect the following requirements:</p> <p>7 years and above experience in events management with a minimum of any NQF level 6 qualification = 20 Points Minimum 5 years' experience in events management with a minimum of any NQF level 6 qualification = 15 Points</p> <p>Non-compliance with the minimum criteria = 0 points</p>	<p>20</p>
<p>TOTAL</p>		<p>100</p>

9.4 Bidders who obtained less than the minimum threshold of **70 points** will be declared non-responsive and therefore will not be eligible for **evaluation of Price & Preference (Specific Goals)**.

10. Price and Specific Points Evaluation (Phase 3)

10.1 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 a Rand value equal to or below R50 million.**

11.4.1 The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

11.4.2 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

11. Pricing Template

Item	Description (Project percentage%)	First 12 months %	Last 6 Months %
1	Project Management percentage		

12. POINTS AWARDED FOR PRICE AND SPECIFIC GOAL 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:

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

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.

13. SPECIFIC GOALS PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

Table1:

13.1 Specific goals for this bid process and points claimed are indicated per the table below.

13.2 A bidder must submit a proof or documentation to claim points for specific goals in the form of a detailed CSD Report/B-BBEE Certificate/sworn affidavit. A bidder failing to submit proof or documentation to claim points for specific goals will be interpreted to mean that preference points for specific goals are not claimed.

Specific Goals	Points
Black Ownership (Maximum points = 5 points)	
• 51%	=5
•30-50%	=3
• 10-29%	=1
Women Owned (Maximum points = 5 points)	
75% - 100%	=5
51% - 74%	=3
Below 51%	=1
Youth (Maximum points = 5 points)	
75% - 100%	=5
51% - 74%	=3
Below 51%	=1
Company-owned by People with disabilities (Maximum point =5 points)	=5

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.

When procuring as the following:

15.1 Consortium

15.1.1 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.

15.1.2 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.

15.1.3 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 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 combination of skills)

b) Partner

- Proof of CSD registration.
- Tax Pin.
- BBBEE Sworn-Affidavit.
- SBD 4

15.1.4 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.

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

15.2 A joint venture

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

15.3 Unincorporated joint venture:

15.3.1 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

- 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.

15.4 Incorporated joint venture

15.4.1 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

- 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.

16 COMMUNICATION

16.1 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.**

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

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shall remain open for acceptance by the Organization for a period of **140 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 of 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 may be conducted by INSETA prior to the award of the contract.

END OF TERMS OF REFERENCE DOCUMENT

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