

REQUEST FOR QUOTATION (RFQ)

RFQ	RFQ/INS/2025/26/0028
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT FINANCIAL MANAGEMENT TRAINING ON DG EXPENDITURE AND CONTRACT MANAGEMENT FOR 2 ADMINISTRATORS
RFQ ISSUE DATE	30 June 2026
BRIEFING SESSION	N/A
CLOSING DATE & TIME	03rd July 2026 at 11:00 am Late submissions will not be considered.
SUBMISSION METHOD	rfqs@inseta.org.za For any queries or questions, please use the above-mentioned email address.
RFQ VALIDITY PERIOD	90 days

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: _____

E-MAIL ADDRESS: _____

CONTACT PERSON: _____

CELL NO: _____

SIGNATURE OF BIDDER _____

1. BACKGROUND

- 1.1. The Insurance Sector Education and Training Authority (INSETA) is a Schedule 3A public entity established in terms of the Skills Development Act. INSETA is mandated to promote skills development within the insurance and related financial services sector in South Africa. As part of advancing sectoral skills development and professionalisation of the insurance industry, INSETA is considering the establishment of a College of Insurance to provide specialised education, training, research, and professional development programmes for the insurance sector. Considering INSETA's legal status as a Schedule 3A institution under the Public Finance Management Act, a legal opinion is required to determine the legislative permissibility, governance implications, and appropriate institutional model for establishing such a college.

2. PURPOSE

- 2.1 INSETA seeks to appoint a suitably qualified and experienced service provider to conduct Financial Management Training on DG Expenditure and contract management for 2 Administrators.

3. DETAILED SPECIFICATION

- 3.1 The appointed Service Provider will liaise with the Human Resources Unit in terms of coordination of the training.
- 3.2 The Service Provider will be required to meet the expected deliverables listed below, for the duration of the project.
- 3.3 The Service Provider will conduct the training at INSETA offices during the official working hours after signing INSETA's Service Level Agreements.
- 3.3.1 The format of Financial Management Training on DG Expenditure and contract management e.g. the structure entailing amongst others,
 - 3.3.2 DG Expenditure Rules: Understanding cost eligibility, direct vs. indirect costs, and financial reporting requirements (interim and final).
 - 3.3.3 Contract Management: Pre-award contract set-up, post-award contract administration, and managing amendments (addendums)
 - 3.3.4 Procurement Compliance: Rules governing service contracts, supply contracts, and works, including tender processes and evaluation
 - 3.3.5 Financial Reporting & Audit: Preparing documentation for audits, including time recording systems and evidence of expenditure.
 - 3.3.6 Compliance: Ensuring all transactions comply
 - 3.3.7 Documentation: Establishing proper record-keeping for audit trails.
 - 3.3.8 Budget Control: Accurate forecasting of cash flow and monitoring expenditure
 - 3.3.9 Risk Management: Reducing risks of ineligible expenditure and contractual disputes.

Board Members: Ms. R. Matenche (Chairperson), Mr. J.J.M. Mabena (Commercial), Mr. C.B. Botha (Commercial), Mr. S.B. Mthethwa (Commercial), Ms. N.M. Nxele (Employer), Mr. S.M. Mpuru (Professional Bodies), Ms. A.S. Khoza (Employer), Ms. M.R. Rauleka (Commercial), Mr. B.A. Monedi (Commercial), Ms. S.A. Anders (Commercial)

CEO: Ms. G. Mkhize

4. EXPECTED DELIVERABLES

- 4.1 Submit a detailed work plan for the period of the project.
- 4.2 Develop and submit a detailed training manual and all relevant material to be approved by INSETA, ensuring that they are in line with the specific objectives of the project.
- 4.3 Print approved training manuals for all training attendees.
- 4.4 Conduct face-to-face training for the administrators on Financial Management Training on DG Expenditure and contract management.
- 4.5 Conduct pre- and post-training evaluations and provide a detailed training report with recommendations.
- 4.6 Provide training completion certificates to participants.
- 4.7 **The training must be conducted at INSETA premises; 18 Fricker Road, Illovo, Sandton**

5. EVALUATION CRITERIA:

The evaluation criteria will be based on the following requirements:

- Phase 0: Administrative requirements
- Phase 1: Mandatory requirement
- Phase 2: Evaluation on Specific Goals and Price – The threshold of 20 points.

Legislative Requirements (Phase 1) – Bidder (s) must submit:

- 5.1 **Complete and Signed RFQ Form Document**
- 5.2 **Quotation and Signed RFQ Form Document**
- 5.3 Complete and Signed Standard Bidding Document (SBD 4) Bidder's Disclosure

Failure to comply with (or submit) the legislative requirements listed above will result in the bidder being non – responsive and result in disqualification.

6. Phase 1: MANDATORY CRITERIA

- 6.1 **The Service providers must attach a valid accreditation certificate with a relevant professional body.**
- 6.2 The bidder must provide **three (3) contactable reference letters** indicating **conduct financial management training on dg expenditure and contract management, OR** similar work done in the past **FIVE (5) years**. The letters must be on the company client's **letterhead, signed and dated** with **contactable details emails, or phone or cell.**

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

6.3 CONTRACT DURATION

- 6.4 **The training must be at least for a duration of 5 days.**

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EMPOWERED TO **INFLUENCE** AND **INSPIRE!**

7. PRICING SCHEDULE

- 7.1** The service provider must ensure that the price quotations are inclusive of all applicable taxes(**Including VAT**). Costing must comprise all the relevant services proposed in the biddersubmission.

Quotation on company letterhead aligned the items listed below

Items	Description Unit	Quantity	Unit Price	Total Cost
1.	conduct financial management training on dg expenditure and contract management,	2	R	R
	Transport cost			R
	VAT			R
	TOTAL			R

- 7.2 NB:** Tax matters for the recommended bidder will be verified on the Central Supplier Database (CSD) or SARS E-Filing prior to awarding. If the bidder's tax matters are non-compliant in terms of clauses 4.2 & 4.3, it will be exercised from National Treasury Instruction No. 09 of 2017/2018 (Tax Compliance Status Verification).

8. COMMUNICATION

- 8.1** 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.
- 8.2** All enquiries relating to this BID / RFQ should be emailed **three days before the closing date**.

9. CONDITIONS TO BE OBSERVED WHEN BIDDING

- 9.1** The organisation 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 their BID submission. The organisation also reserves the right to withdraw or cancel the BID at any stage.
- 9.2** No BID shall be deemed to have been accepted unless and until a formal contract/letter of award is prepared and executed.
- 9.3** The competitive shall remain open for acceptance by the Organisation for a period of **90 days** from the closing date of the RFQ Enquiry.

INSETA reserves the right to:

- 9.4 Do not evaluate and award a bid that does not comply strictly with this BID document.
- 9.5 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.
- 9.6 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.
- 9.7 Cancel this BID at any time as prescribed in the PPPFA.
- 9.8 Should bidder(s) be selected for further negotiations, they will be chosen based on the principle of cost effectiveness and the principle of value for money, not necessarily on the basis of the lowest costs.

10 COST OF BIDDING

- 10.2 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.

ANONYMOUSLY REPORTING OF FRAUD

Bidders are encouraged to report any incidents of • fraud • corruption • theft • misconduct or •unethical behaviour to the Vuvuzela Hotline. Contact number: 0800 119 691

11. NOTE TO BIDDERS

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

END OF DOCUMENT