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REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE ONLINE ENTERPRISE-WIDE RISK MANAGEMENT TRAINING

RFQ	RFQ/2021/22/14
RFQ ISSUE DATE	20 April 2021
BRIEFING SESSION	N/A
RFQ DESCRIPTION	Appointment of a Service Provider to Facilitate Online Enterprise-Wide Risk Management Training
CLOSING DATE & TIME	26 April 2021 @ 11:00
LOCATION FOR SUBMISSIONS	rfqs@inseta.org.za

Bidders must submit responses via e-mail at: rfq@inseta.org.za, before or on the stipulated date and time. For any queries or questions, please use 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: _____

E MAIL ADDRESS: _____

CONTACT PERSON: _____

CELL NO: _____

SIGNATURE OF BIDDER: _____

DETAILED SPECIFICATION

APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE ONLINE RISK MANAGEMENT TRAINING

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 is a Schedule 3A Public Entity in terms of the Public Finance Management Act No 1 of 1999, as amended (PFMA). This therefore implies that the INSETA must fully comply with all the requirements of the PFMA as well as the Irregular Expenditure Framework.
- 1.3** The purpose of this request is to invite service providers to submit quotations to facilitate online risk management training for thirty-six (36) management and specialists team members of INSETA.
- 1.4** The INSETA has adopted a risk-based supervision model hence the understanding of risk management has become very critical.
- 1.5** As a result, a need was identified to train employees in risk management to be better equipped with skills to identify and manage risks in their respective areas.
- 1.6** Only one training session is required for the two-day training intervention.

2. TERMS OF REFERENCE

- 2.1** INSETA is looking for a **custom made INSETA** enterprise-wide risk management training in relation to:
 - 2.1.1 Training strategies, objectives, and risk tools
 - 2.1.2 Corporate governance and risk management
 - 2.1.3 Risk definitions and
 - 2.1.4 Benefits of risk management
 - 2.1.5 Risk framework, risk policy and risk plan
 - 2.1.6 Risk management process
 - 2.1.7 Integrated risk management
 - 2.1.8 Understanding and application of risk tolerance and risk appetite to INSETA risk management environment

3. EVALUATION CRITERIA

3.1 BBBEE and Price

3.1.1 As the RFQ price is estimated to be between **R 30 000.00 and R 500 000.00**, therefore RFQ responses will be evaluated on the **80/20** Price & BBEE preference point system.

3.2 Pre-Qualification Criteria

3.2.1 Bidder must submit proof of registration on CSD (Central Supplier Database). The bidder will be verified if they are not listed on database of restricted suppliers and register of tender defaulter. The bidder will also be verified if they are in business.

3.2.2 Bidder must submit proof and must be an EME or QSE only (**level 1 or level 2 BBBEE contributor**) status will be considered (**no generic companies will be considered**).

3.2.3 The SBD form must be fully completed, signed, and initialled by the authorised company representative.

3.2.4 Proposals will be verified against all administrative requirements of the bid which included the completeness of the Standard Bidding Documents and General Conditions of Contract (GCC).

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

3.1 Mandatory Requirement:

3.2.1 The bidder must provide a proof that they are an accredited member of **“The Institute of Risk Management South Africa”**

3.2.2 The bidder must provide atleast three (3) reference letters indicating training conducted for Risk Management Training. Reference letters must be dated, signed and be in the referring company’s letterhead. The reference letter(s) must clearly indicate the service that was rendered aligned to the RFQ requirements.

Failure to provide this mandatory information will lead to bidder’s proposal not been considered further on price and BBBEE.

3.3 **Price & B-BBEE:** Evaluation based on price and BBBEE in line with the provisions of the

Preferential Procurement Policy Framework Act of 2017. BBBEE and Price. As the RFQ price is estimated to be between R 30 000.00 and R 500 000.00, therefore RFQ responses will be evaluated on the 80/20 Price & BBEE preference point system.

3.4 Pricing Considerations:

3.4.1 Bidders' price quotations must be inclusive of all applicable taxes **(including VAT)**.

3.4.2 Costing must comprise of the following services:

- a) Providing Online Enterprise-Wide Risk Management Training for thirty-six (36) management and specialists.
- b) The bidder will be responsible for the following:
 - Presenting, Printing, and distributing of training manuals to INSETA Offices
 - Printing of certificates of attendance.
 - Other training associated costs.

3.4.3 Pricing schedule

PRICE SCHEDULE		
COSTING MUST COMPRISE OF THE FOLLOWING SERVICES:	QUANTITY	SUB-TOTAL
Risk Management Training Course Outcome: <ul style="list-style-type: none"> - Understanding Risk and Risk Management. - Risk Management Legal Framework - Risk Management Legislative Framework - Benefits of Risk Management - Responsibility and accountability for Risk Management - OHS Risks Facing INSETA - Risk management and the link with strategic and operational planning process for INSETA - Fraud Risk Management - The impact of Risk Management on the objectives of each Business Unit within the INSETA - Business continuity management and the impact of COVID-19 Risk within the INSETA. - And other requirements as stated in Terms of Reference. 	36 Members	
Printing and Delivery of Manuals		
Certification of Attendance		

PRICE SCHEDULE		
COSTING MUST COMPRISE OF THE FOLLOWING SERVICES:	QUANTITY	SUB-TOTAL
Other Associated cost		
SUB-TOTAL		
VAT	15%	
TOTAL PRICE		

NB: Tax matter for the recommended bidder will be verified on Central Supplier Database (CSD) or SARS Efilling prior awarding. If the bidders' tax matters are non-compliant in terms of clause 4.2 & 4.3 will be exercised from National Treasury Instruction No. 09 of 2017/2018 (Tax Compliance Status Verification).

4. ADJUDICATION USING A POINT SYSTEM

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

5. POINTS AWARDED FOR PRICE

The **80/20** preference point system

A maximum of **80** points is allocated for price on the following basis:

$$P_s = 80 \{1 - (P_t - P_{\min}) / P_{\min}\}$$

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

6. B-BBEE PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

B-BBEE Status Level of contributor	Number of points 80/20 system
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 6.1** Bidders who qualify as EME's and QSE's in terms of the B-BBEE Act must submit a Sworn affidavit. Misrepresentation of information constitutes a criminal offence.
- 6.2** Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by SANAS.
- 6.3** A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 6.4** A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

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- 6.5 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.
- 6.6 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.
- 6.7 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.

7. 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 a RFQ, between the closing date and the date of the award of the business.

All enquiries relating to this RFQ should be emailed three days before the closing date.

8. CONDITIONS TO BE OBSERVED WHEN RFQING

INSETA does not bind itself to accept the lowest or any RFQ, 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 RFQ. INSETA reserves the right to accept a separate RFQ or separate RFQs for any one or more of the sections of a specification. The corporation also reserves the right to withdraw the RFQ at any stage.

No RFQ shall be deemed to have been accepted unless and until a formal contract / letter of intent is prepared and executed. Quotation shall remain open for acceptance by the Corporation for a period of **90 days** from the closing date of the RFQ Enquiry.

INSETA reserves the right to:


- 8.1. Not evaluate and award RFQs that do not comply strictly with this RFQ document.
- 8.2. Make a selection solely on the information received in the RFQs and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the evaluation of this RFQ.
- 8.3. 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 RFQ shall be sought, offered or permitted.
- 8.4. Award a contract to one or more bidder(s).
- 8.5. Accept any RFQ in part or full at its own discretion.
- 8.6. Cancel this RFQ or any part thereof at any time as prescribed in the PPPFA regulation.

- 8.7. Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the greatest benefit to the Corporation and not necessarily on the basis of the lowest costs.

9. Cost of Bidding

The bidder shall bear all costs and expenses associated with preparation and submission of its RFQ or RFQ, 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.

END OF RFQ DOCUMENT



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Annexed to this document for completion and return with the document:

- Preference Points Claim Form (SBD 6.1), Declaration of Interest (SBD 4),
- Declaration of Bidder's Past Supply Chain Practices (SBD 8),
- Certificate of Independent Bid Determination (SBD 9)
- General Conditions of Contract (GCC)
- Bidders bank confirmation letter reflecting company registration number

Non – compliance in returning above mentioned documents, will deem the bid nonresponsive.

