



MINUTES

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| Meeting | NON-COMPULSORY BRIEFING SESSION: APPOINTMENT OF A SERVICE PROVIDER TO DELIVER REGULATORY EXAMINATION (RE-5) WORKSHOPS AS WELL AS TO SUPPORT CANDIDATES PREPARING TO WRITE EXAMINATIONS |
| Date | 27 June 2019 |
| Time | 10H00-11H00 |
| Venue | INSETA Boardroom |
| Attendees | Phiwokuhle Gawulana (PG) Specialist: Demand, compliance and contract management Nasreen Ravat (NR) Learning Manager: Worker Programmes Lebogang Phaleng (LP) SCM Specialist |
| Item No | Agenda Items |
| 1 | Opening PG welcomed everyone to the briefing session and declared the meeting opened. He requested all prospective bidders to complete the attendance register. He stated that attendance to the session is non-compulsory, meaning that other service providers who did not attend the session will be allowed to submit their bids. The proceedings of the session will be recorded. The Purpose of the session is to provide clarity and address any questions that prospective bidders might have. |
| 2 | Matters discussed 2.1 Technical Requirements NR took the attendees through the terms of reference /technical requirements as follows: - The intention of the project is to assist the industry with preparing for the regulatory exams (RE). It includes a two-day workshop and post exam support. |

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- The regulatory requirements pose a challenge to industry in terms of attaining what they need to remain fit, proper and employed in the sector. INSETA is playing this role to offer support towards writing the exam, that is imposed by the Financial Sector Conduct Authority.
- The regulatory exam passing rates have dropped to less than 50% and it is very concerning to the industry.
- The support to be provided by the appointed service provider must be of a nature that it extensive and helps candidates to get through the exams.
- Part of the bid is to recruit and bring in employed candidates within the financial services sector. Not only from insurance, but from banking and related activities).
- INSETA anticipates a minimum of 650 candidates, currently working within the sector. INSETA will further provide criteria to the successful provider.
- INSETA expect the service providers to have their own updated study guides. The study guides must be credible and must have been signed-off by an industry expert.
- The demand stats are not easily available due to the POPI Act. Based on demand, INSETA does not know the number of workshops that will be run.
- Bidders will not be required to pay for candidates' travel.
- The appointed service provider will be expected to furnish INSETA with a list of recruited learners and subsequently provide performance reports of candidates that were assisted.
- Due to the spread across regions, the expected post support is online i.e. online study groups.

PG highlighted the following in terms of the SCM requirements:

- The minimum threshold for functionality is 70%.
- Bidders have until 05 July 2019 to ask further questions and sought clarifications.
- Closing date for submission of bids is 09 July 2019 at 11H00. Proposals received after the closing time will not be accepted or considered for evaluation.



PG further highlighted that Standard Bidding Documents (SBD) that must be completed, signed and submitted together with the proposals. Failure to do so may lead to a bid being disqualified from the process.

1. SBD1: contains the details of the service provider. The important point is that on submission of the bid, bidders must be registered on National Treasury’s Central Supplier Database (CSD) and the CSD number must be indicated on SBD 1. INSETA will also be verifying the tax compliance status of the bidders on the CSD and SARS eFiling.
2. SBD 4: Mainly focuses on the potential conflict of interest, hence the important part is that the director’s names and ID numbers must be indicated. There must also be a declaration of whether the bidder or any of its directors have any relation to any of INSETA employees.
3. SBD 6.1: Highlights the evaluation method to be applied. The bid is not estimated to exceed R 50 million hence the 80/20 principle will apply. Sworn affidavits are acceptable if the bidder is a Qualifying Small Enterprise or Exempted Micro Enterprise.
4. SBD 8: Refers to past practices of the bidder. I.e. where a bidder was contracted to carry out work and failed to do so or has been prohibited to do business with the state, it must be declared upfront in SBD 8.
5. SBD 9: is intended for competition purposes, hence it highlights all instances that are prohibited to be undertaken by the bidders i.e collusion.

Questions and Answers

| Question/comment | Answers |
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| 1. Is it part of the terms of reference to re-write the study guide? | INSETA expects bidders to have already provided the workshops and have the study guides. |
| 2. Will INSETA accept reference letters from the same company for multiple projects? | Yes, INSETA from the same client are acceptable however they must be for different projects. |
| 3. Will bidders be penalised for not having full classrooms if learners do not pitch for training and do not honour their obligations? | INSETA will not penalize bidders for non-attendance. |
| 4. Is 650 a minimum number of candidates? | Yes |

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| | <p>5. In terms of the recruitment, will bidders be advertising, screening and interviewing the candidates?</p> <p>6. In terms of advertising where would we advertise?</p> <p>7. Will INSETA assist with the recruitment of candidates?</p> <p>8. If a bidder wants to bid for one area, i.e. Eastern Cape what numbers should be looked at?</p> <p>9. Do bidders need to be accredited with INSETA to qualify to bid?</p> | <p>The appointed service provider will be required to advertise and shortlist according to criteria provided by INSETA. No interview will be required.</p> <p>The appointed bidder must initiate their own adverts. In addition, INSETA could advertise on professional bodies' platforms.</p> <p>INSETA will assist with the criteria however will not be involved with the nitty-gritties.</p> <p>Regrettably, INSETA is looking for one provider to deliver on the whole project for consistency purposes. Bidders could look at possible Joint Ventures with other interested bidders who are looking at other regions.</p> <p>No.</p> |
| <p>3</p> | <p>Closure PG thanked everyone for attending and declared the briefing session closed.</p> | |



Phiwokuhle Gawulana
Demand, Compliance and Contract Management

Date: 05/07/19