

## **REQUEST FOR INFORMATION**

**RFI NUMBER: RFI002/INSETA/21**

### **REQUEST FOR INFORMATION ON THE DOCUMENT MANAGEMENT SERVICES AND DRAFT A FRAMEWORK AND FILE PLAN MANAGEMENT**

The INSETA calls for suitably qualified suppliers to provide request for information for **Provision of Document Management Services: Refer to page 3 of 6 number 2**

**Issue Date: 19<sup>th</sup> April 2021**

**Briefing Session: Not Applicable**

**Closing Date: 28<sup>th</sup> April 2021**

**For enquiries contact INSETA Supply Chain Management E-mail: [bids@inseta.org.za](mailto:bids@inseta.org.za)**

This RFI is an invitation for person(s) to submit information(s) for the provision of the services as set out in the Specification contained herein. Accordingly, this RFI must not be construed, interpreted, or relied upon, whether expressly or implicitly, as an offer capable of acceptance by any person(s), or as creating any form of contractual, promissory, or other rights. No binding contract or other understanding for the supply of services will exist between INSETA and any Respondents unless and until INSETA has executed a formal written contract with the selected supplier.

## INSETA

### REQUEST FOR INFORMATION (RFI)

**RFI NUMBER : RFI 002/INSETA/21**  
**RFI TITLE : REQUEST FOR INFORMATION ON THE DOCUMENT MANAGEMENT SERVICES IN DRAFT A FRAMEWORK AND FILE PLAN MANAGEMENT**

### EXPECTED TIMEFRAME

RFI PROCESS	EXPECTED DATES
RFI Advertisement Date	<b>19<sup>th</sup> April 2021</b>
RFI Available from	<b>20<sup>th</sup> April 2021</b>
Compulsory Briefing Session Date & Time	<b>N/A</b>
Venue for Briefing Session	<b>N/A</b>
<b>RFI Closing Date and Time</b>	<b>28<sup>th</sup> April 2021 at 11:00</b>
Delivery Venue: <b>Electronics Submission</b>	<a href="mailto:bids@inseta.org.za">bids@inseta.org.za</a>
Contact details	<a href="mailto:bids@inseta.org.za">bids@inseta.org.za</a>

INSETA retains the right to change the timeframe whenever necessary and for whatever reason it deems fit.

Respondents interested in participating must register their interest by providing company name, contact person, telephone, cell number and email address to INSETA, please indicate RFI number on the subject line. This will ensure that any addenda and clarification to this RFI are communicated to all participants.

## 1. MANDATORY DOCUMENTS

### 1.1 CSD report (Central Supplier Database)

## 2. DEFINITIONS

- 2.1 “RFI” - a request for information, which is a written official enquiry document encompassing all the terms and conditions of the information in a prescribed or stipulated form.
- 2.2 “RFI response” - a written response in a prescribed form in response to an RFI
- 2.3 “Respondent” – any person (natural or juristic) who forwards an acceptable RFI in response to this RFI with the intention of being the main contractor should the RFI be awarded through a competitive bid process.

### 3. CONFIDENTIALITY

All information related to this request for information both during and after completion is to be treated with strict confidence. Should the need however arise to divulge any information gleaned from the service which is either directly or indirectly related to the INSETA, written approval to divulge such information will have to be obtained from INSETA.

The Respondents must ensure that confidential information is: maintained confidential; not disclosed to or used by any unauthorised person; so as to prevent any disclosure or unauthorised use with at least the standard of care that Respondents maintain to protect their own confidential information; only used for the purpose of considering and responding to this RFI; and not reproduced in any form except as required for the purpose of considering and responding to this RFI. Respondents must ensure that: access to confidential information is only given to those of its partners, officers, employees and advisers who require access for the purpose of considering and responding to this RFI; and those partners, officers, employee and advisers are informed of the confidential information section and keep that information confidential. This bid remains at all times the property of the INSETA. No rights other than as provided in this bid and in respect of the confidential information are granted or conveyed to bidder/s

Name of Respondent: \_\_\_\_\_

Physical Address: \_\_\_\_\_  
\_\_\_\_\_

Respondent's contact person: Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

Mobile: \_\_\_\_\_

Fax.: \_\_\_\_\_

E-mail address: \_\_\_\_\_

#### 4. The manner of submission of the RFI

- 4.1 Respondent shall submit RFI response in accordance with the prescribed manner.
- 4.2 Respondent shall submit one **emailed submission** including relevant supporting documents. ([bids@inseta.org.za](mailto:bids@inseta.org.za))
- 4.3 The subject line on the email submission must be clearly marked with the responding organisation's name and RFI number and description of RFI.
- 4.4 Respondent must clearly outline costing implications of the solution required, as well as any economic factors that may pose a risk impact against said costing.

#### 5. SITUATIONAL ANALYSIS

##### 5.1 Background

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.

#### 6. REQUEST FOR INFORMATION:

**Bidders are requested provided information against the following:**

- 6.1 Draft, and implement training of a document management framework for INSETA that includes a file plan management and the potential cost
- 6.2 The potential cost of training and implementing file plan management
- 6.3 Bidders would be required to implement this process within a period 6 months – therefore costing must be aligned to that period
- 6.4 We are a public entity, and we have the following divisions within our organisation:

Core Divisions	Support Services
Learning Programmes	<input type="checkbox"/> Finance, SCM, Governance
Quality assurance	<input type="checkbox"/> Human Resource Management
Project management	<input type="checkbox"/> Marketing and PR
Skills Division	<input type="checkbox"/> Information Technology

## 7. GENERAL INFORMATION

Enquiries in respect of this RFI should be addressed to:

**Supply Chain Management**

E-mail: [bids@inseta.org.za](mailto:bids@inseta.org.za)

**Note: All queries MUST be e-mailed**

**END OF THE REQUEST FOR INFORMATION DOCUMENT**