

Working together for a skilled tomorrow

**REQUEST FOR QUOTATION (RFQ)**

**APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT REVIEWING, ASSESSING AND APPROVAL OF LEARNING MATERIAL/S - (SUBJECT MATTER EXPERT/S)**

RFQ	RFQ/2021/22/35
RFQ ISSUE DATE	25 May 2021
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT REVIEWING, ASSESSING AND APPROVAL LEARNING MATERIAL/S - (SUBJECT MATTER EXPERT/S)
CLOSING DATE & TIME	28 May 2021 @ 11:00
LOCATION FOR SUBMISSIONS	<a href="mailto:rfqs@inseta.org.za">rfqs@inseta.org.za</a>

**Bidders must submit responses via e-mail at: [rfqs@inseta.org.za](mailto:rfqs@inseta.org.za), before 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 CONDUCT REVIEWING, ASSESSING AND APPROVAL OF LEARNING MATERIAL/S - (SUBJECT MATTER EXPERT/S)

#### 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 The purpose of this request is to invite service providers to submit quotations for the appointment of subject matter expert/s to review and approve learning materials.

#### 2. SCOPE OF WORK

The need to embark on a concerted drive with SETAs to plan, design, fund and deliver learning material to support the sector to meet the FSCA requirements.

##### 2.1 Class of Business:

- 2.1.1 Class of business
- 2.1.2 Short-term Insurance: Personal lines
- 2.1.3 Short-term Insurance: Commercial lines
- 2.1.4 Long-term Insurance
- 2.1.5 Pension fund benefits
- 2.1.6 Short-term and Long-term deposits
- 2.1.7 Structured Deposits
- 2.1.8 Investments
- 2.1.9 Foreign currency investments
- 2.1.10 Health Services Benefits

- 2.2 It is for the above-mentioned Class of Business materials and assessments that INSETA requires the services of suitably qualified and experienced Subject Matter Expert/s to review and approve Learning Materials and the Assessment Instruments.
- 2.3 Through this RFQ the INSETA seeks to appoint suitably experienced Subject Matter Expert/s to review and approve learning materials and related assessment tools for the above-mentioned programmes.
- 2.4 The deliverables under this project must be completed within **4 weeks from the appointment date** after contracting.
- 2.5 INSETA expects that Subject Matter Expert/s will deliver services in this project, according to their experience in their professions, qualifications and development of learning materials as they relate to the above-mentioned class of businesses.

## 2.6 DELIVERABLES

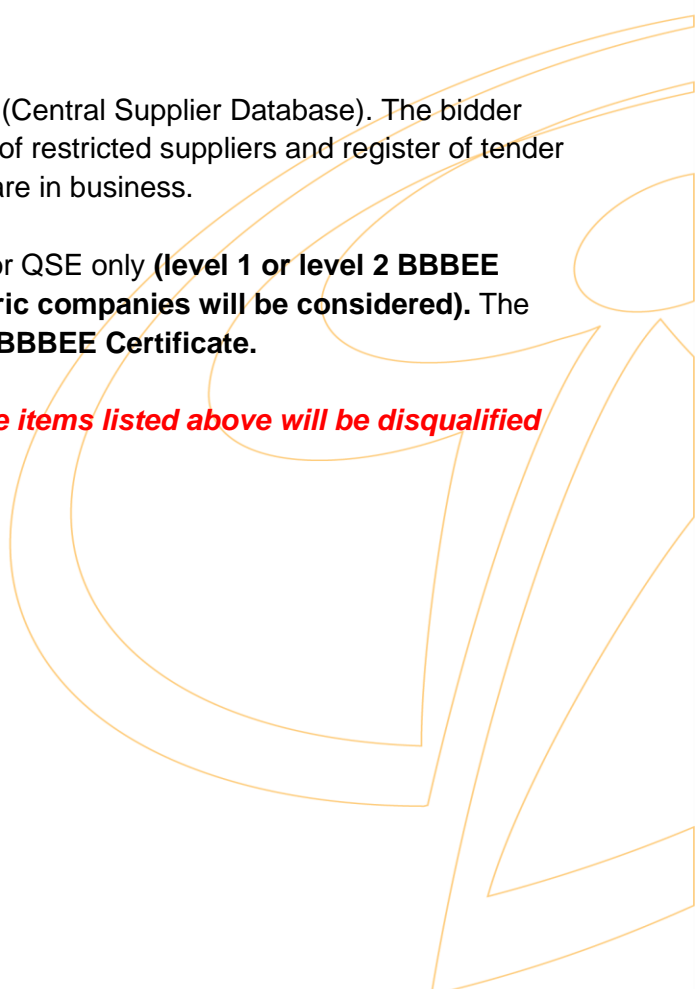
**2.6.1** Reviewing, assessing, and approving of full set/s of Learning Materials for the Class of Business learner materials and ensuring that the materials align to the FSCA requirements with regards to currency and accuracy of content and suitability of assessment tools.

## 3. PRE-QUALIFICATION CRITERIA

**3.1** 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** 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**). The proof must be either **Sworn Affidavit / Copy of BBBEE Certificate**.

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



#### 4. FUNCTIONAL EVALUATION CRITERIA

4.1 The following criteria and weights will be used to evaluate the RFQ for functionality.

FUNCTIONAL AREA	CRITERIA	WEIGHT
<p><b>Bidder's Experience in reviewing, assessing and approving learning materials.</b></p>	<p>The bidder must provide the following evidence related to bidder's experience:</p> <p>Bidder to provide evidence of assessed, reviewed, and approved a minimum of one (1) set of Learning Materials = <b>15 points</b></p> <p>Bidder must submit proof of signed closing reports indicating that bidder has previously assessed, reviewed and approved Learning Materials = <b>15 points</b></p> <p><b>Non-compliance with any and all of the above criterion = 0 points</b></p>	<p><b>30</b></p>
<p><b>Subject Matter Expert Details (Project Team)</b></p>	<p>Bidders must submit at least three (3) team members or an individual with the relevant experience. These subject matter experts – team members or individuals must provide an abridged CVs reflecting experience in reviewing, assessing and approving learning material within the Insurance and related financial services sector. Bidders team or individual must comprise of Project Manager, Material proofreader or Material Reviewer, Approver.</p> <p><b>Bidder's team members or individual must each have the following:</b></p> <ul style="list-style-type: none"> <li>• A minimum of 5 years' working experience in reviewing, assessing and approving learning material within the Insurance and related financial services sector = <b>20 points</b></li> <li>• Above 5 years working experience in reviewing, assessing and approving learning material within the Insurance and related financial services sector = <b>40 points</b></li> </ul> <p><b>Non-compliance with the minimum criteria = 0 points</b></p>	<p><b>40</b></p>
<p><b>Contactable Reference</b></p>	<p>Bidders must submit a company profile with a list or contactable references for having successfully assessed, reviewed, and approved Learning Materials.</p> <p>The bidder must indicate the following on the list:</p> <ul style="list-style-type: none"> <li>• Name of the client</li> <li>• Description of work completed aligned to assessing, reviewing and approving Learning materials</li> </ul>	<p><b>30</b></p>

	<ul style="list-style-type: none"> <li>• Period or duration of a contract including completion date and</li> <li>• Contactable email address</li> </ul> Number of contactable references for project completed: <ul style="list-style-type: none"> <li>• 2 – 5 completed projects = 20 points</li> <li>• Above 5 completed projects = 30 points</li> </ul> <p><b>Non-compliance with the minimum requirement = 0 points</b></p>	
<b>Total Points</b>		<b>100</b>

4.2 Bidders who obtained less than the **minimum threshold of 70 points** out of a total of **100 points** will be declared non-responsive and therefore will not be eligible for evaluation of BBEE & Price Preference.

## 5. PRICE SCHEDULE

### 5.1 Pricing Schedule

No.	DESCRIPTION (TEAM MEMBER)	Hourly Rate (aligned to 4-week period)
1.	Project Manager	
2.	Material proofreader or Material Reviewer	
3.	Approver	
Sub-Total		
<b>15% VAT</b>		
<b>Grand Total</b>		

5.2 Bidders' price quotations must be inclusive of all applicable taxes (**including VAT**). The bidder must submit quotation on a company letterhead.

5.3 Price & B-BBEE: Evaluation based on price and BBEE in line with the provisions of the Preferential Procurement Policy Framework Act of 2017. BBEE 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.

5.4 Tax matter for the recommended bidder will be verified on Central Supplier Database (CSD) or SARS eFiling 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).

## 6. ADJUDICATION USING A POINT SYSTEM

- 6.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 6.2 Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 6.3 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.
- 6.4 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.
- 6.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

## 7. POINTS AWARDED FOR PRICE

The **80/20** preference point system

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

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

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

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

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

- 8.1** 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.
- 8.2** 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.
- 8.3** 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.
- 8.4** 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.
- 8.5** 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.
- 8.6** 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.
- 8.7** 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.

**9. 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.

## 10. 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:**

- 10.1** Not evaluate and award RFQs that do not comply strictly with this RFQ document.
- 10.2** 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.
- 10.3** 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.
- 10.4** Award a contract to one or more bidder(s).
- 10.5** Accept any RFQ in part or full at its own discretion.
- 10.6** Cancel this RFQ or any part thereof at any time as prescribed in the PPPFA regulation.
- 10.7** 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.

## 11. 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**

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

- Fully completed Declaration of Interest (SBD 4),
- Fully completed Fully completed Preference Points Claim Form (SBD 6.1)
- Fully completed Declaration of Bidder's Past Supply Chain Practices (SBD 8),
- Fully completed Certificate of Independent Bid Determination (SBD 9)
- Initial each page of General Conditions of Contract (GCC)

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

