



## **REQUEST FOR QUOTATION (RFQ)**

*Working together for a skilled tomorrow*

**APPOINTMENT OF A PANEL OR FRAMEWORK CONTRACT FOR SUBJECT MATTER EXPERTS TO DEVELOP INSTRUMENTS/TOOLS FOR EISA EXAMINATIONS AS WELL AS PROVIDE EISA EXAM SCRIPT MARKING & SCRIPT MODERATION SERVICES FOR REGISTERED OCCUPATIONAL QUALIFICATIONS.**

<b>RFQ</b>	<b>RFQ/2021/22/142 (ADDENDUM)</b>
<b>RFQ ISSUE DATE</b>	<b>23 NOVEMBER 2021</b>
<b>RFQ DESCRIPTION</b>	<b>APPOINTMENT OF A PANEL OR FRAMEWORK CONTRACT FOR SUBJECT MATTER EXPERTS TO DEVELOP INSTRUMENTS/TOOLS FOR EISA EXAMINATIONS AS WELL AS PROVIDE EISA EXAM SCRIPT MARKING &amp; SCRIPT MODERATION SERVICES FOR REGISTERED OCCUPATIONAL QUALIFICATIONS.</b>
<b>CLOSING DATE &amp; TIME</b>	<b>26 NOVEMBER 2021 @ 11h00</b>
<b>LOCATION FOR SUBMISSIONS</b>	<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). 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: \_\_\_\_\_

## 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 Quality Council for Trades and Occupations (QCTO) is a regulated body that quality assures the provision of Occupations Qualifications (OQs) in South Africa. The INSETA/QCTO Service Level Agreement (SLA) signed in December 2020 mandates INSETA as a QCTO delegated Development Quality Partners (DQP) as well as an Assessment Quality Partner (AQP) to among other: Develop, review and implement the roll-out of OQs for implementations by delegated bodies:
- 1.2.1 Develop, review and implement the roll-out of OQs for implementations by delegated bodies.
  - 1.2.2 Manage the implementation of External Integrated Summative Assessments (EISA) examinations for OQs.
  - 1.2.3 Recommend Skills Development Providers (SDPs) as well as suitable Assessment Centres to host EISA examinations.
- 1.3 Therefore, INSETA wishes to appoint Subject Matter Experts (SMEs) to (on request):
- 1.3.1 Develop EISA ready examination instruments/tools for Seven (7) registered OQs
  - 1.3.2 provide EISA exam script marking & moderation services for Seven (7) registered OQs.

## 2. PURPOSE

- 2.1 To develop examination ready question papers and model answers in line with the associated OQ blueprint for each qualification. INSETA will provide to the SME the related blueprint for each qualification.
- 2.2 To ensure that candidate examination scripts are marked and moderated by competent experts leading up to resulting candidates for each qualification attempted.

## 3. PROJECT OF OBJECTIVES

- 3.1 The objective of the project is to enable INSETA to fully implement Occupations Qualifications in-line with its mandate as a QCTO delegated AQP. The SME will be contracted to provide services the following:
- 3.3.1 Development banks of 5 x unique EISA ready examination instruments/tools for each of the SEVEN (7) registered OQs – **see list below**.
  - 3.3.2 Provide script marking & moderation services (**on demand**) for each of the SEVEN (7) registered OQs. The services are required for a period of 12 months.

### 3.3.3 The list of qualifications include:

SAQA ID Code	Occupation Qualification Title	NQF Level	Credits
91784	Insurance Agent – Insurance Underwriter	Level 05	156
99668	Claims Administration – Claims Assessor	Level 04	131
105030	Health Care Benefits Advisor	Level 05	102
105022	Long-Term Insurance Advisor	Level 05	180
105025	Employee and Pension Fund Benefits Advisor	Level 05	110
105021	Investment Advisor	Level 06	213
99574	Professional Principal Executive Officer.	Level 05	120

## 4. SCOPE OF WORK

The successful bidder(s) is required to perform the following services:

### 4.1 Development of Banks of EISA Instruments/Tools for each of the (7) OQs:

- 4.1.1 Develop a bank of 5 x unique EISA ready instruments (question papers) for each of the listed OQs.
- 4.1.2 Develop a bank of 5 x unique EISA ready tools (model answers) for each of the OQs listed above.
- 4.1.3 The instruments/tools must comply with the Qualification Assessment Specification (QAS Addendum) for each OQ. The QAS addendum is a blueprint used to develop instruments for each OQ. **The QAS addendum will be provided by INSETA to the selected SME(s).**
- 4.1.4 The SME must submit to INSETA a project plan highlighting timeline. INSETA envisages that the first round of EISA exams will be at the end of November 2021.
- 4.1.5 The SME must also be prepared to sign an INSETA confidentiality agreement. **The confidentiality agreement will be provided by INSETA to the selected SME(s).**

### 4.2 Provision of EISA Exam Script Marking & Moderation Services:

- 4.2.1 Exam script marker and moderator to attend a memo discussion meeting (on-demand) pre-marking/moderation of exam scripts per INSETA examination schedule.
- 4.2.2 Mark EISA exam scripts using available script marking memo/model answers provided by INSETA (each subject on-demand).
- 4.2.3 Moderate a minimum 30% marked EISA exam scripts using available script marking memo/model answers provided by INSETA (each subject on-demand).
- 4.2.4 Prepare and complete a marksheet at the end of each marking session – marksheet template will be provided by INSETA.
- 4.2.5 Prepare an EISA exam script marking report for each confirmed marking session/qualification.
- 4.2.6 Prepare an EISA exam script moderation report for each confirmed moderation session/qualification.
- 4.2.7 Exam script marker and moderator to attend an EISA exam results adoption committee meeting post marking/moderation of scripts per INSETA examination schedule.

## 5. DELIVERABLES

### 5.1 As at when required, related to the development of instruments & tools, the SME must:

- 5.1.1 Deliver to INSETA 5 x unique EISA ready EISA examination instruments and tools for each OQ.
- 5.1.2 The SME prepare and submit to INSETA signed development reports for each OQ.
- 5.1.3 The SME must submit to INSETA a development project plan highlighting deadline.

### 5.2 As at when required, related to the marking & moderation of scripts, the SME must:

- 5.2.1 Exam script marker and moderator must attend a memo discussion meeting (on-demand) pre-marking/moderation of exam scripts per INSETA examination schedule.
- 5.2.2 Mark and moderate EISA exam scripts using available script marking memo/model answers provided by INSETA for each OQ.
- 5.2.3 Prepare and complete marksheet(s) at the end of each marking session per OQ – marksheet template will be provided by INSETA.
- 5.2.4 Prepare an EISA exam script marking and moderation reports for each confirmed marking session per qualification marked.
- 5.2.5 Exam script marker and moderator to attend an EISA exam results adoption committee meeting post marking/moderation of scripts per INSETA examination schedule.

## 6. KEY PERFORMANCE INDICATORS

Key Responsibilities	Activities	Results Indicators (Including all applicable evidence to substantiate against all key responsibilities)
<b>Related to development fo instruments/tools:</b>		
Submit profiles of EISA instrument developer(s) for each OQ.	Recruit subject matter individuals/experts that will develop the instruments for each OQ.	Developer profiles (CVs), ID Copies, appointment letter and signed INSETA non-disclosure agreement.
Submit profiles of EISA instrument moderator(s) for each OQ.	Recruit subject matter individuals/experts that will moderate the instruments for quality, correctness and suitability for each OQ.	Instrument Moderator profiles (CVs), ID Copies, appointment letter and signed INSETA non-disclosure agreement.
Develop and moderate 5 unique instruments per OQ.	Develop, moderate and submit final instruments/tools per INSETA OQ prioritisation and timelines.	EISA bank approved by INSETA
Submit to INSETA instrument development reports for each OQ.		Development reports signed by developer and moderator.

Related to script marking & moderation:		
Submit profiles of EISA script marker(s) for each OQ.	Recruit experts that will mark/assess exam script for each OQ.	Submit marker profiles (CVs), ID Copies, appointment letter and signed INSETA non-disclosure agreement.
Submit profiles of EISA script moderator(s) for each OQ.	Recruit experts that will moderate marked exam scripts for each OQ.	Submit moderator profiles (CVs), ID Copies, appointment letter and signed INSETA non-disclosure agreement.
Mark EISA scripts prepare marking reports.	Submit to INSETA marked scripts within agreed time-limits.	Signed marked scripts and complete a marker's report.
Moderate marked EISA scripts and prepare moderation reports.	Submit to INSETA marked and moderated scripts within agreed time-limits.	Signed moderated scripts and complete a moderator's report.

## 7. TIMEFRAMES

7.1 The duration of the contract will be for period of **18 months** from the date of appointment.

## 8. CONTRACTUAL OBLIGATION

- 8.1 Bidder rate-based pricing will be fixed for the duration of the contract.
- 8.2 Bidder will be expected to sign SBD 7.2 contract form upon award.
- 8.3 Bidder will be issued a PO on request of services as and when require.
- 8.4 The contract value will be capped at **R 1 000 000,00 including VAT for services as and required.**
- 8.5 The service provider's quotation must also provide sufficient detail in terms of various cost items such as total "man" hours and daily rates for the project team.
- 8.6 In the case of the service provider using sub-contractors, the former will be responsible for ensuring delivery of services from any such sub-contractors and for making any payments to such sub-contractors.
- 8.7 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place **(upon parties contracting)**
- 8.8 Bidder must comply to any relevant legislative framework including but not limited to POPI Act 4 2013.

## 9. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 9.1. No legal or other obligation shall arise between the service provider and INSETA unless/until both parties have signed a formal contract or Service Level Agreement in place.
- 9.2. The Contract site is at **INSETA (as and when required).**

## 10. WORKMEN AND SUPERVISION ON SITE

10.1. The service provider shall be held responsible for the conduct of his employees and the conduct of his sub-contractor's employees for the full duration of the contract.

## 11. MANDATORY CRITERIA

11.1 Bidder must submit proof of registration on CSD (Central Supplier Database).

11.2 Experience in developing content used for Skills Development training. QCTO Accreditation Number. Experience should be in a form of reference letters. Reference letter(s) received from previous clients specifying training content development work completed.

11.3 Occupational experience for each expert used to mark EISA exams for each OQ. The bidders should submit profile of each expert (per OQ) showing a minimum of **3 years** work experience in the profession associated with the OQ.

11.4 Occupational experience for each expert used to moderate EISA exams for each OQ. The bidders should submit profile of each expert (per OQ) showing a minimum of **5 years** work experience in the profession associated with the OQ.

**Note: Bidders who are non-compliant with the mandatory criteria will result in automatic disqualification and therefore will not be eligible for evaluation of BBBEE & Price Preference.**

## 12. PRICING SCHEDULE

12.1 Bidder to prepare their pricing according to the availability of venue (irrespective of the number of qualifications being written on the day). Pricing must include items listed in the below table but not limited to:

Section / Category (as per the terms of reference) – Development of Instruments/Tools	Number of OQs to be Developed	Price per set of 5 developed	Total
Develop a bank of 5 x unique EISA ready instruments (question papers) for each of the listed OQs.			
Develop a bank of 5 x unique EISA ready tools (model answers) for each of the OQs			
Other Costs – Please Give Details of Costs:			
Section / Category (as per the terms of reference) – Marking/Moderation Services		Price per script marked or moderated	Total
Provision of EISA Exam Script Marking Services per script.			
Provision of EISA Exam Script Moderation Services per script			

Other Costs – Please Give Details of Costs:			
<b>Sub-Total</b>			
<b>VAT (15%)</b>			
<b>Total</b>			

### 13. Preference Evaluation:

#### 13.1 BBBEE and Price

As the tender **price is estimated to be below R50 million**, the tender responses will be evaluated on the **80/20**-point system.

### 14. ADJUDICATION USING A POINT SYSTEM

- 14.1** The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 14.2** Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 14.3** In the event that two or more bids have scored equal points in terms of price and preference points for BBBEE, the successful bid must be the one scoring the highest number of preference points for BBBEE - in terms of PPPFA Regulation 2017 – Section 11 (1) & (2)
- 14.4** However, when functionality is part of the evaluation process and two or more bids have scored equal points for BBBEE, the successful bid must be the one scoring the highest score for functionality.
- 14.5** Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

### 15. POINTS AWARDED FOR PRICE AND BBBEE PREFERENCE POINT

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

Pmin = Comparative price of lowest acceptable bid

## 16. 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

- 16.1** 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.
- 16.2** 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.
- 16.3** 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.

## 17. Consortium

- 17.1.** A consortium is an association of two or more individuals, companies, organisations or governments (or any combination of these entities) with the objective of participating in a common activity or pooling their resources for achieving a common goal.



- 17.2.** A consortium requires that each participant retains its separate legal status and the consortium's control over each participant is generally limited to activities involving the joint endeavour, particularly the division of profits. A consortium is formed by contract, which designates the rights and obligations of each member.
- 17.3.** In a consortium, only the lead bidder's credentials both in terms of financial and technical qualifications are considered. Therefore, the interpretation and application to a RFQ/Bid process is such that the lead partner is identified and the following requirements are required as follows:
- a) Lead Partner**
- All administrative documents (consortium agreement between the lead partner and the partner)
  - Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intent and purpose fulfils the requirements of the bid through combination of skills)
- b) Partner**
- Proof of CSD registration.
  - Tax Pin.
  - BBBEE Sworn-Affidavit.
  - SBD 4 Declaration of interest.
  - SBD 8 Past supply chain.
- 17.4.** It should be taken into cognisance that although the lead partner is the qualifying entity, the partner should prove that it can do business with state-owned entities, through CSD registration, proof that the taxes are compliant, its level of BBBEE status in order to align with the BBBEE status level required by the BID, declare interest and answer questions that it is not a disqualified entity with the National Treasury. The foregoing ensures compliance from an SCM process perspective that the consortium is in order.
- 17.5.** Of importance is that in a consortium, each individual team members retain their identities.
- 18. A joint venture**
- 18.1.** A joint venture is a business entity created by two or more parties, generally characterized by shared ownership, returns and risks and shared governance.
- 19. Unincorporated joint venture:**
- 19.1.** All SCM documents are filled in by the joint venture in the name of the joint venture, although the submission of administrative documents (partnership agreement between parties) will be

completed in the name of the joint venture, and the following will be required from both parties, amongst others

- a) SBD 4.
- b) SBD 6.
- c) SBD 8.
- d) SBD 9.
- e) Tax pin
- f) CSD registration.
- g) The JV agreement will direct which bank account of the two entities will be used.
- h) Consolidated Joint BBBEE Certificate.

## 20. Incorporated joint venture

**20.1** This aligned to a registered entity or company. A registered entity/ company with a consolidated BBBEE certificate and a bank account in the name of the Joint venture. The required compliance documents must be complete by the entity/ company the name of the joint venture, and the following will be required amongst others

- a) SBD 4.
- b) SBD 6.
- c) SBD 8.
- d) SBD 9.
- e) Tax pin
- f) CSD registration.
- g) The JV agreement will direct which bank account of the two entities will be used.
- h) Consolidated Joint BBBEE Certificate.

**20.2** 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.

**20.3** 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.

## 21. 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 BID process, between the closing date and the date of the award of the business.

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

## 22. CONDITIONS TO BE OBSERVED WHEN BIDDING

The organization 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 his BID submission. The organization also reserves the right to withdraw or cancel the BID at any stage.

No BID shall be deemed to have been accepted unless and until a formal contract / letter of award is prepared and executed.

The competitive shall remain open for acceptance by the Organization for a period of **120 days** from the closing date of the BID Enquiry.

### INSETA reserves the right to:

- 22.1 Not evaluate and award a bid that do not comply strictly with this BID document.
- 22.2 Make a selection solely on the information received in the Bid Document and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the terms of reference.
- 22.3 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 BID shall be sought, offered or permitted.
- 22.4 Cancel this BID at any time as prescribed in the PPPFA regulation.
- 22.5 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the of cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

## 23. Cost of Bidding

- 23.1 The bidder shall bear all costs and expenses associated with 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.

**24. Note to Bidders:**

**24.1** Due diligence to be conducted by INSETA prior to the award of the contract.

**END OF TERMS OF RFQ DOCUMENT**



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

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

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

