



Road Traffic Management Corporation

**APPOINTMENT OF A SERVICE PROVIDER
FOR PROVISION OF GROUP RISK
BENEFITS SERVICES TO THE RTMC**

RTMC BID NO: 16/2021/22

CONDITIONS AND UNDERTAKINGS BY BIDDER IN RESPECT OF THIS BID

1. Proprietary Information

Road Traffic Management Corporation (RTMC) considers this bid and all related information, either written or verbal, which is provided to the bidder, to be proprietary of RTMC. It shall be kept confidential by the bidder and its officers, employees, agents and representatives. The bidder shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of RTMC.

2. Enquiries

- 2.1 All communication and attempts to solicit information of any kind relative to this bid should be channelled to the email below, however the cut-off date will be on the **17 August 2021**.

Name	RTMC
Email Address	Bidadmin@rtmc.co.za

- 2.2 All the documentation submitted in response to this bid must be in English.
- 2.3 The RTMC may respond to any enquiry in its sole discretion and the bidder acknowledges that it will have no claim against the RTMC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

3. Validity Period

Responses to this bid received from bidders will be valid for a period of **120 days** counted from the closing date of the bid.

4. Supplier Performance Management

- 4.1 Supplier Performance Management is viewed by the RTMC as critical component in ensuring value for money acquisition and good supplier relations between the RTMC and all its suppliers.
- 4.2 The successful bidder shall upon receipt of written notification of an award, be required to conclude a Service Level Agreement (SLA) with the RTMC, which will form an integral part of the agreement. The SLA will serve as a tool to measure, monitor and assess the supplier's performance level and ensure effective delivery of service, quality and value-add to RTMC business.

5. Instructions on submission of Bids

5.1 Bids should be submitted as follows:

5.1.1 Technical envelopes

- Two (2) copies for technical responses/functional evaluation (1 Original and 1 copy)
- PDF soft copy in a memory stick of the technical responses/functional (to be enclosed in the envelope which contains the original document)

5.1.2 Financial envelopes

- Pricing schedule should be submitted separately Two (2) copies (1 Original and 1 copy)
- PDF soft copy in a memory stick of the pricing schedule (to be enclosed in the envelope which contains the original document)

5.2 All envelopes to be sealed and endorsed, **RTMC BID 16/2021/22: Appointment of a service provider for provision of group risk benefits services to the RTMC.**

5.3 The sealed envelope must be placed in the bid box at the Main Reception area of the **RTMC Eco Origin Office Park, Block F, 349 Witch-Hazel Street, Highveld, Centurion Ext 79, 0157 by no later than 11:00am on 20 August 2021.**

5.4 Compulsory Briefing session: Online/Virtual

5.4.1 The online/Virtual compulsory briefing session will be held on **12 August 2021 at 10:00am.**

5.4.2 Bidders are required to register for a compulsory briefing session by submitting necessary information to bidadmin@rtmc.co.za by not later than **11 August 2021 at 14:00pm** in order to be eligible to participate in the compulsory briefing and the bid process.

The following information is required to register for a briefing session:

- Company Name
- CSD Registration number
- Name and Surname of the Representative

Bidder/s who fail to comply with the above requirement will not be considered the compulsory briefing session.

5.4.3 Upon registration a link will be shared with the bidders to enable them to participate on the stated virtual meeting.

5.4.4 Bidders will be required to login using their company name, thirty (30) minutes before the starting time of the briefing session to allow for a virtual registration. Example, if the session starts at 10:00am bidders will be allowed to login at 09:30am and session will start promptly at 10:00am. No bidder/s will be allowed in the briefing session past the starting time.

5.4.5 After the briefing session, a signed briefing certificate will be emailed to all the bidders who were part of the online/virtual briefing session.

NB: The mentioned briefing certificate must be attached on the bid documents upon submission on the closing date of the bid. (Failing which will invalidate the bid)

5.5 The bidder's company name, closing date and the return address must also be endorsed on the envelope.

5.6 All bids submitted must be signed by a person or persons duly authorised thereto.

5.7 If a courier service company is being used for delivery of the bid document, the bid description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered into the bid box. The RTMC will not be held responsible for any delays where documents are not placed in the bid box before closing time.

5.8 Bid received by email, facsimile or similar medium will not be considered.

5.9 Where a bid document is not placed in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. **Late bids will not be considered.**

5.10 Amended bids may be sent in an envelope marked "**Amendment to Bid**" and should be placed in the bid box before the closing time.

5.11 Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by RTMC in regard to anything arising from the fact that pages are missing or duplicated.

6. Undertakings by the Bidder

- 6.1 The bidder accepts that all costs incurred in preparation, presentation and any demonstration in relation to this bid shall be for the account of the bidder.
- 6.2 The bidder hereby offer to render all or any of the services described in the attached documents to the RTMC on the terms and conditions and in accordance with the specifications stipulated in this bid documents (and which shall be taken as part of, and incorporated into, this proposal at the prices inserted therein).
- 6.3 The bidder shall prepare for a possible presentation should RTMC require such and the bidder shall be notified thereof no later than 4 (four) days before the actual presentation date. Such presentation may include demonstration of products or services as called for by the RTMC in relation to this bid.
- 6.4 The successful bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.
- 6.5 The bidder furthermore confirm that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents and that the price(s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accept that any mistakes regarding price(s) and calculations will be at his/her risk.

7. RTMC's Rights and Obligations

- 7.1 The RTMC reserves the right not to accept the lowest bid or any bid in part or in whole. RTMC normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is technically acceptable and/or financially advantageous to the RTMC.
- 7.2 The RTMC also reserves the right to award this bid as a whole or in part without furnishing reasons.
- 7.3 The RTMC reserves the right to conduct a site visit at the premises of the offices or at any client sites if so required.
- 7.4 The RTMC reserves a right to amend any bid conditions, validity period, specifications, or extend the closing date of bid prior to the initially stated closing date. Bidders will be advised in writing of such amendments in good time.
- 7.5 The RTMC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the RTMC to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.
- 7.6 The RTMC acknowledge and agree that all data and Personal Information provided by the bidder to the RTMC, or to which the RTMC may be exposed, shall constitute Personal Information.
- 7.7 The RTMC hereby undertakes–
- 7.7.1 in favour of the bidder that it shall at all times strictly comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) and any other legislation related to the protection of Personal Information;
 - 7.7.2 to use its best efforts to keep Personal Information confidential and shall not disclose any Personal Information to any other person except as required by law, save to the extent set out in this bid; and
 - 7.7.3 not process Personal Information for any purpose other than to perform its obligations under this bid.

8. Supplier Development and Promotion of Emerging Black Owned Service Provider

- 8.1** The RTMC promotes enterprise development in this regard, successful bidders are encouraged to mentor SMME's and/or Youth owned businesses. The implications of such arrangement will be subject to negotiations between the RTMC and the successful bidder.
- 8.2** It is also the objective of the RTMC to promote transformation of the South African economy and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this bid would be undertaken by black owned entities.
- 8.3** To give effect to this requirement, bidders are required to submit a partnership/ subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring.

9. SPECIAL INSTRUCTIONS TO BIDDERS

- 9.1** Bidders shall provide full and accurate answers to the questions posed in this document.
- 9.2** Bidders **must** substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/technical requirements. All documents as indicated must be supplied as part of the bid response.
- 9.3** The RTMC reserves the right to sign a Service Level Agreement (SLA) with the service provider to supplement services in an agreement in this regard.
- 9.4** RTMC reserves the right to include any additional related items on the contract that are currently not part of the bid document.
- 9.5** The RTMC will not be held responsible for any costs incurred in the preparation and submission of bid documents.

NB: RTMC reserves the right to verify information provided by bidders and any misrepresentation will lead to disqualification of the bidder.

SECTION: 2

SPECIFICATION DETAILS AND FUNCTIONALITY REQUIREMENTS

SECTION 2: TECHNICAL REQUIREMENTS/ SPECIFICATIONS

1. PURPOSE

The purpose of this bid is to invite potential service providers for provision of group risk benefits to the RTMC.

2. BACKGROUND

2.1 The Corporation is committed in providing adequate benefits to employees in times of need. Therefore, there is a need to provide group risk benefits which will then form part of an enhanced employee benefit package. These benefits are an important component of the total offering when attracting and retaining employees.

2.2 The risk benefits provide financial protection to employees and their dependants in the event of death or a long-term illness, while still in employment of the RTMC. Risk events such as death or disability can be a costly exercise with a number of complexities and uncertainties, unless effectively managed.

2.3 The RTMC currently employs nine hundred seventy-three employees (973) employees. There are also eight hundred fifty-four (854) traffic trainees enrolled on traffic trainee programme. Therefore, there are one thousand eight hundred and twenty-seven (1827) members to be covered.

2.4 It is against this background that the RTMC would like to hereby appoint an experienced and reputable service provider to provide a comprehensive Group Risk Benefit (where applicable) for a period of five (5) years.

3. SPECIFICATIONS / SCOPE OF WORK

3.1 The Road Traffic Management Corporation hereby requests experienced and reputable bidders to submit proposals for provision of the Group Risk Benefits for RTMC employees.

3.2 The risk benefits should include the following:

- Group Life Cover (Death whilst on duty)
- Family Funeral Benefit /Death Benefit

3.2.1 The breakdown of the group risks benefits to be sourced is indicated below:

Group Life

Type	Insured Amount
Group Life (Death whilst on Duty)	An amount equal to R350 000, no matter how much the employee earns

Funeral Cover/Death Benefit

Category of Insured Person	Insured Amount
A Primary Insured Person (RTMC employee)	R100 000.00
An Insured Spouse	R70 000.00
An insured Child aged 14 or over	R30 000.00
An insured Child aged 6 or over but under the age 14	R25 000.00
An insured Child aged 2 or over but under the age of 6	R10 000.00
An insured Child under age 2 but excluding a stillborn Insured Child	R6 250.00
A stillborn Insured Child	R6 250.00

3.3 Burial Repatriation

3.3.1 The group life cover must include transportation of the deceased by road or air to the final funeral home. This takes into consideration an employee who may pass on whilst on duty on deployment, therefore the anticipated financial implications should remain the same.

3.4 The said service provider needs to provide a comprehensive employee benefits team, to facilitate the following:

- Awareness sessions on group risk benefits;
- Claims assessment and processing;
- Comprehensive Reporting;
- Data Monitoring;

- Response Handling;

3.5 The bidder must outline deliverables in terms of the following:

- Support
- Reporting
- Innovation, additions and/or other improvements and options regarding the project

SECTION: 3

EVALUATION CRITERIA

1. EVALUATION CRITERIA

The bid will be evaluated in the following stages:

(a) Stage 1 - Standard Compliance Requirements

Bidders are expected to submit and comply with all the required Standard Compliance Requirements. Failure to comply with these requirements, will lead to bidders being disqualified from evaluation. Below are Standard Mandatory requirements

- Bidders are required to submit 2 copies [One (1) Original plus one (1) Copy] and PDF soft copy in a memory stick.
- All standard bidding documents must be duly completed and signed by authorised person. In case of a JV, Consortium or similar relationship/arrangements; bidders must submit standard bidding documents for entities in an arranged business relationship and accompanied by an agreement.
- Bidders must be registered with National Treasury Centralised Supplier Database.
- Compulsory Briefing Session Certificate

(b) Stage 2- Mandatory Requirements

Bidders who fail to meet the mandatory requirements will be disqualified from further evaluation.

(c) Stage 3 – Functionality Evaluation

This stage will be on written responses/ proposals which consists of **100 points**.

Bidders will be required to score a minimum of 70 points in order to qualify for a stage 4

(d) Stage 4 – Price and Preference Points Evaluation Bidders will be evaluated on an 80/20 Preference Point System (i.e. 80 points on Price and 20 points on B-BBEE).

1.1 STAGE 1 – STANDARD COMPLIANCE REQUIREMENTS

NOTE: BIDDERS WHO FAIL TO COMPLY WITH BELOW STANDARD COMPLIANCE REQUIREMENTS WILL BE DISQUALIFIED FROM FURTHER EVALUATION.STANDARD COMPLIANCE REQUIREMENTS	Comply (Yes / No)
ENVELOPE ONE (1)	
Total Number of copies submitted – Two (2) (1 original and 1 copy) PDF soft copy in a memory stick	
Compulsory Briefing Session Certificate	
Proof of CSD Registration. (CSD number or report) Registration on CSD (available on www.csd.gov.za)	
SBD1: Invitation to bid and company information	
SBD4: Declaration of interest	
SBD8: Declaration of bidder's past supply chain management practice	
SBD9: Certificate of independent bid determination	
ENVELOPE TWO (2)	
Total Number of copies submitted – Two (2) (1 original and 1 copy) PDF soft copy in a memory stick	
Pricing schedule	
SBD6.1: Preference points claim form	

NB: Failure to comply with the above requirements will lead to a disqualification of the bid.

1.2 STAGE 2 – MANDATORY REQUIREMENTS

NOTE: A BIDDER WHO FAILS TO MEET THE ABOVE MANDATORY REQUIREMENTS WILL BE DISQUALIFIED FROM FURTHER EVALUATION

Item	Description	Comply Yes/No
1.	<p>Financial Sector Conduct Authority (FSCA)</p> <p>Bidder must be licensed as a Financial Services provider in terms of Financial Advisory and Intermediary Services Act (FAISA).</p> <p>Compliance requirement:</p> <p>A valid Certificate of Registration must be provided for evaluation. Certified copies will be accepted</p>	

NB: Failure to comply with the above requirements will lead to a disqualification of the bid.

1.3 STAGE 3 – FUNCTIONALITY CRITERIA

NB: FUNCTIONAL EVALUATION WILL BE ON WRITTEN RESPONSE

This process will be used which comprises of written responses/ proposals.

WRITTEN RESPONSES/PROPOSALS

DESCRIPTION	POINTS
<p>A. References of Similar Work Done</p> <p>The bidder must provide details of similar insurance work done which will reflect experience in the financial service industry:</p> <ul style="list-style-type: none">• 5 - 10 reference letters = 15 Points• 11 reference letters and more = 20 Points <p>Compliance requirement:</p> <p>Bidders are required to submit reference letters where similar insurance services were rendered. The following details must reflect on the reference letters.</p> <ul style="list-style-type: none">• Name of the institution/entity where similar insurance service was rendered successfully,	<p>20</p>

<ul style="list-style-type: none"> • Address of the institution/entity where similar insurance services were rendered, • Duration/Period, and • Contact details. <p>NB: Failure to indicate all the above requirements of the reference letters will lead to bidders not obtaining points.</p>	
B. Qualifications, Skills & Experience of the key professional team	20
<p>The bidder must provide CV's and Academic qualifications of the following key resources that would form part of the team.</p> <p>(1) Key Account Personnel = 13 Points</p> <ul style="list-style-type: none"> • 5 years of experience or more in the financial sector (attach CV) = 8 Points • Regulatory Examination (RE) Certificate = 5 Points <p>Compliance requirement: Attach CV, certified copy of RE certificate</p> <p>NB: Any submission less than the required experience and certificate will not be allocated points</p> <p>(2) Client Liaison Officer = 7 Points</p> <ul style="list-style-type: none"> • 3 years of experience or more in the insurance industry (attach cv) = 2 Points • Regulatory Examination (RE) Certificate = 5 Points <p>Compliance requirement: Attach CV and certified copy of RE certificate</p>	
C. Technical capacity and methodology work plan	30
<p>1. The bidder must provide a detailed approach, methodology and processes in terms of claims settlements/turn-around times in relation to the following: -</p> <ul style="list-style-type: none"> ➤ Group Life Cover (Death whilst on duty) = 5 Points ➤ Funeral benefit claims = 5 Points <p>The above should address the following variables: (roles and responsibilities, minimum forms to be completed, method of submission (manually or electronically), checklist, dedicated call centre agents supporting RTMC)</p>	

<p>2. Evidence of an installed electronic self-service system and helpdesk facility that provides accurate and up to date information on the administration of the scheme (sample/printout) = 5 Points</p> <p>3. Evidence of document management system that complies with a record management system, POPI, and any other policies or procedures that apply to the nature of confidential information that arises from this service (attach internal policy and/or SOPs) = 5 Points</p> <p>4. Provide claims and escalation procedures = 5 Points</p> <p>5. Monthly reporting and monthly engagements (attach sample report) = 5 Points (The quality of the approach/motivation for each activity provided by the bidder will be evaluated using the table below)</p>	
D. Professional indemnity insurance	20
<p>The bidder is required to have a valid and current professional indemnity insurance.</p> <ul style="list-style-type: none"> • R5 million to R10 million indemnity cover = 10 Points • Above R10m to R20m indemnity cover = 15 Points • Above R20m indemnity cover = 20 Points <p>Compliance requirement:</p> <p>The bidder must attach a proof of professional indemnity insurance cover.</p> <p style="text-align: center;">OR</p> <p>Letter of intent in the bidder's letterhead and signed confirming that the bidder commits to take a cover in relation to the above accompanied by a quotation from the insurer.</p>	
E. Value-added services	10
<p>Bidders to indicate what value-added services that could be offered to the entire value chain.</p> <p>Compliance requirement:</p> <p>The value-added services should include the following:</p> <ul style="list-style-type: none"> • Induction on claims processes and administration • Creating awareness • Standard and/or ad-hoc training <p>NB: The following must be linked to the activities listed above, i.e. when (timelines), how (approach), by whom (responsibly person) and outcome. (The quality of the</p>	

approach/motivation for each activity provided by the bidder will be evaluated using the table below)

The proposal on **C and E** will be evaluated using the below matrix

VALUE	DESCRIPTION
5- Excellent	Meets and exceeds the functionality requirements
4- Very Good	Above average compliance to the requirements
3- Good	Satisfactory and should be adequate for stated element
2- Average	Compliance to the requirements
1-Poor	Poor response
0- Non-Compliant	Does not comply to the requirements

TOTAL

100

NB: BIDDERS ARE EXPECTED TO SCORE MINIMUM OF SEVENTY (70) POINTS IN ORDER TO QUALIFY FOR STAGE 4.

1.5 STAGE 4 – PRICE AND B-BBEE (PREFERENCE POINTS EVALUATION)

Bidder/s who qualify for this stage will be evaluated using the PPPFA and the one scoring highest points will be awarded bid

CRITERIA	MAXIMUM POINTS
Price	80
B-BBEE Rating	20
Grand Total	100

SECTION: 3
ANNEXURE AND
STANDARD BIDDING
DOCUMENTS

See the attached SBD forms
(All SBD forms must be
signed)

BIDDING DOCUMENTS: GENERAL INFORMATION

1. The bidding forms are drawn up so that certain essential information is to be furnished in a specific manner. Any additional shall be furnished in the enclosed questionnaire(s) or in a separate annexure.
2. The bidding forms should not be retyped or redrafted but photocopies may be prepared and used. Additional offers may be made for any item, but only on a photocopy of the page in question. Additional offers made in any other manner may be disregarded.
3. Bidding forms not filled in using a computer and printer shall be completed in black ink.
4. Bidders shall check the numbers of the pages and satisfy themselves that none are missing or duplicated. No liability shall be accepted in regard to claims arising from the fact that pages are missing or duplicated.
5. The forms in respect of Preference Points Claim, if attached, shall be completed and submitted with the completed Bid.
6. Firm bid prices and delivery periods are preferred. Consequently, bidders shall clearly state whether prices and delivery periods will remain firm for the duration of the contract or not.
7. If non-firm prices are submitted, this fact should be clearly stated in the bidding documents.
8. Where items are specified in detail, the specifications from an integral part of the bidding document and bidders shall indicate in the space provided whether the items offered are to specification or not.
9. In respect of the paragraphs where the items offered are strictly to specification, bidders shall insert the words "as specified".

- 10.** In cases where the items are not to specification, the deviations from the specifications shall be indicated.
- 11.** The bid prices shall be given in the units shown.
- 12.** All prices shall be quoted in South African currency.