



REQUEST FOR QUOTATION:

RFQ 22845

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE TRAINING FOR THE SALES TEAM AT ITHALA SOC LIMITED

NON-COMPULSORY BRIEFING SESSION MONDAY 22 APRIL 2024 @ 10H00

CLOSING DATE AND TIME: TUESDAY, 30 APRIL 2024 @ 11H00

Quotations to be submitted via email: Quotes_LTD@myithala.co.za

Procurement Enquiries

Name : S. P. Miya
Telephone : 031 366 2544
Email : spmija@myithala.co.za

Name of service provider:

TO ATTEND THE ONLINE BRIEFING PLEASE SEND AN EMAIL TO quotes_LTD@myithala.co.za (quotes underscore ltd@ myithala dot co dot za) and write the RFQ number on the body of the email, we will respond with an invitation that will be sent on 19 April 2024.

REQUEST FOR QUOTATIONS

RFQ 22845: APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE TRAINING FOR THE SALES TEAM AT ITHALA SOC LIMITED

Competent service providers are hereby invited to furnish written quotations for performing the above-mentioned service / supplying the above-mentioned goods.

The following conditions will apply:

Price(s) quoted must be valid for at least **sixty (60)** days from date of your offer.

Price(s) quoted must be firm.

A firm delivery period must be indicated.

This quotation will be evaluated in terms of the 80/20 preference point system as prescribed in the Preferential Procurement Policy Framework Act (No 5 of 2000) and its Preferential Regulations 2022. For the purpose of this tender a maximum points of 80 will be allocated for price and one of the following specific goals will be acceptable for the claiming of points, i.e. Black women ownership, Black youth ownership or disability ownership. A maximum of 20 points will be allocated for either one of the specific goals to be claimed.

More than 51% owned by Blacks as per the category on Table 1	20
Less than 51% owned by Blacks as per the category on Table 1	10
Zero ownership of the category indicated on Table 1	0

The onus is on the service provider to provide documentary proof of the claims in terms of the specific goals, failure to submit proof will result in non-allocation of points, thus regarded as not claiming.

Enclosed is the Integrity Declaration which must be completed in full and signed by the service provider, **failure to complete and sign shall invalidate your quotation.**

A quotation must be submitted with the following **compulsory** documents:

- A copy of valid BBBEE certificate or Sworn Affidavit (non-compulsory)
- Central Supplier Database (CSD) summary report
- **Company profile**
- **Minimum of 3 reference letters**
- **Qualifications and accreditation of the Facilitator**

No awards will be made to person(s)

- Who is not registered on the Central Supplier Database;
- Who is in the service of the state;
- If that person is not a natural person, of which any director, manager, principal shareholder or stakeholder is a person in the service of the state; and/or

Quotation must only be submitted by email Quotes_Ltd@myithala.co.za (quotes underscore at myithala dot co dot za)

NON-COMPULSORY MSTEAMS (ONLINE) BRIEFING SESSION MONDAY 22 APRIL 2024 @ 10H00.

All quotations must be submitted on or before **11:00 on Tuesday, 30 April 2024**. No quotations will be accepted after this date and time.

Ithala SOC reserves the right to withdraw any invitation to quote and/or to re-advertise or to reject any quotation or to accept a part of it. Ithala SOC does not bind itself to accepting the lowest quote or award a contract to the tenderer scoring the highest number of points.

Yours faithfully

SUPPLY CHAIN MANAGEMENT

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A BRANCH IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

Terms of Reference for the Sales training

1. BACKGROUND

1.1 Ithala SOC Limited is a wholly owned subsidiary of Ithala Development Finance Corporation.

It is an authorized Financial Services and Credit Provider. Our purpose is to provide financial services to the people of KwaZulu-Natal, thereby contributing to the province's socio-economic development. Our physical footprint spans the entire province of KwaZulu-Natal, and, in some rural areas, we remain the only financial institution with a physical presence.

1.2 Our mandate is to provide access to financial products and services in areas where such offerings have previously been unavailable. As part of our essential products and services bouquet, we provide the following via a multi-channel distribution network to individuals, groups, businesses, and other public sector entities:

- Transactional Banking.
- Electronic Banking.
- Insurance.
- Lending.
- Public Sector Finance.
- Savings and Investments.

1.3 The Target audience of this training is Ithala Sales personnel at Head office and at the branch networks.

2. OBJECTIVE

The objective is to appoint a competent training service provider/consultant to conduct a maximum of 2-days' face-to-face sales training for 180 sales representatives of Ithala SOC Limited. This training shall enable Ithala sales personnel to improve sales skills, enhance sales performance, improve communication, and change salesperson behaviour to maximise sales success.

3. DURATION & LOCATION

The contract will be for the duration of the training and the post training course, agreed by Ithala & the potential training provider, which will include:

- 2 days training engagement that will be delivered face to face to iThala sales personnel based in 3 regions (Coastal, Midlands and North).

- a. Coastal Region will be at Durban Head office (45 delegates).
 - b. Midlands Region will be at Ezakheni Industrial Estate in Ladysmith (65 Delegates)
 - c. Norther Region will be at Ejozini (65 delegates).
- 1 day post training mentoring session (online) that will be agreed upon by Ithala and the potential training provider.

4. PROPOSAL REQUIREMENTS

The training service providers will be evaluated in two phases. The first phase will be the technical competency as outlined below which shall prove the technical competency of the bidder and the facilitator. The second phase will be for the bidder to provide a tailor-made training content, where bidders who qualified on the first phase will be allowed an opportunity to study Ithala SOC its nature and business model and then develop a sales training programme that is tailor-made for Ithala SOC specifically and then the cost thereof.

The Training provider/Consultant are requested to submit proposals in the following format, clearly specifying:

- i. The profile of the company, indicate who the company is, who are the owners or Directors in the company and what is their experience and expertise in offering the training and more specifically the sales training. A list of previous and current clients who must be from the financial services industry within South Africa in general and more specifically in the banking sector.
- ii. The bidder must provide a relevant record of experience in the form of reference letters, minimum of 3, of which:
 - 1 must be from a financial institution and
 - 1 must be from a banking institution.
 - 1 must indicate experience in training clients who were operating within a rural (Traditional) environment.
- iii. Technical competencies of the facilitator, (Assessor, Moderator) qualifications certificates.

PHASE 2 (Only applicable to bidders who passed Phase 1)

A. Methodology.

- iv. A tailor-made training content with specific deliverables as below:
 - i. **The training course which should include but not limited to the modules below:**
 - a. Presentation/Preparation for pitching: train our staff to present ideas in a clear, logical way to move the audience – and the business forward in a way that builds confidence.
 - b. Suggest a pitching format such as the APPA (Attention, Proposition, Problems & Actions), the key perceptions to shape in order to create trust, handling doubts, questions & objections, how to differentiate the Bank, yourself and get the client's attention.
 - c. Environmental, Social and Governance Risk: cultural sensitivity, how to conduct oneself in traditional areas
 - d. Closing techniques and follow up to the next stage.
 - ii. The course should be based but not limited to authentic case studies, with role play and should be aimed at transforming participants into high sales personnel.
 - iii. A 30-minute presentation must be prepared to give an overview of the training content to Ithala stakeholders and will form part of evaluation criteria. The presentation **must** be done by the facilitator who will be conducting these training sessions. This presentation will done online.
 - iv. A signed Close-Out Report in Microsoft Word or Adobe Acrobat PDF format, to be received by Banking sales and services division within 7 (seven) working days of completing the training sessions, that, among other things will:
 - a. summarize the curriculum of the training that was provided; and

- b. Provide feedback to Ithala management on outcomes of the programme.
- c. make recommendations to the Management on other training requirements to improve sales and negotiating skills.
- v. Keep & provide Ithala with a record of all delegates who were trained.
- vi. Issue certificate of Attendance
- vii provide a one-day online post training feedback mentorship per Region at the date and time that will be agreed on.

B. Project plan and Financial cost

- a) The project plan should indicate how is the bidder going to deliver this training based on the number of learners provided for each Region and Head Office.
- b) The bidder must provide a comprehensive financial cost taking into account the training facilitation, training materials, travel and subsistence and other disbursements.

5. THE EVALUATION CRITERIA

The evaluation criteria will be in two phases.

- **Phase 1**

- b) Company profile indicating as outlined above.
- c) A minimum of three (3) reference letters. One from financial institutions, one from a banking institution and one from any institution where the clients were operating within a rural environment in South Africa. The more the merrier.
- d) Qualifications and accreditations of the facilitator
- e) General bank / financial services aligned training content.
- f) **No financial proposals must be submitted during this phase or that will be considered at this phase.**

- **Phase 2 (Only bidders who passed Phase 1)**

- a) Ithala SOC tailor-made training content covering the deliverables indicated above and more

- b) Project plan outlining how is the training going to be delivered considering the number of trainees and their geographical locations (three regional and Head Office)
- c) 30 minute Presentation
- d) One day per Region post-training feedback mentorship (online)
- e) Financial proposal based on tailor-made training content, training material, facilitation, travel and subsistence and other relevant disbursements including the feedback mentorship.

- **Phase 3 (Price and Specific goals)**

An 80/20 price and specific goals preference points system will be used to award this bid.

6. EXPECTED DELIVERABLES

The expected deliverables of this engagement include:

- a) A signed Close-Out Report in Microsoft Word or Adobe Acrobat PDF format, to be received by Banking Sales and Services division within 7 (seven) working days of completing the training sessions, that, among other things will:
 - b) summarise the curriculum of the training that was provided; and
 - c) Provide feedback to Ithala management on outcomes of the programme.
 - d) make recommendations to the Management on other training requirements to improve sales and negotiating skills.
 - e) Keep & provide Ithala with a record of all delegates who were trained.
 - f) Issue a Certificate of Attendance for each trainee who has attended.
 - g) Post-training feedback mentoring sessions

NB: PLEASE SIGN BELOW TO INDICATE UNDERSTANDING AND ACCEPTANCE OF THE TERMS OF REFERENCE ABOVE

NAME OF BIDDER: _____

SIGNATURE OF BIDDER: _____

DATE: _____

A. INTEGRITY DECLARATION

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to quote. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the tenderer to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the quotation process.

2. Tenderer's declaration

2.1 Is the tenderer, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state?

YES	NO
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2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by Ithala SOC (Ltd)?

YES	NO
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2.2.1 If so, furnish particulars:

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES	NO
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¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.3.1 If so, furnish particulars:

3 DECLARATION

I, the undersigned, (name & Surname) _____ in submitting the accompanying quotation, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this declaration;
- 3.2 I understand that the accompanying quotation will be disqualified if this declaration is found not to be true and complete in every respect;
- 3.3 The tenderer has arrived at the accompanying quotation independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying quotation have not been, and will not be, disclosed by the tenderer, directly or indirectly, to any competitor, prior to the date and time of the official quotation closing or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the tenderer with any official of Ithala SOC (Ltd) in relation to this procurement process prior to and during the quotation process except to provide clarification on the quotation submitted where so required by the Ithala SOC (Ltd); and the tenderer was not involved in the drafting of the specifications or terms of reference for this quotation.
- 3.5. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.
- 3.6 The tenderer or any of its directors is / are not listed on the National Treasury's Register of Tender Defaulters or the Database of Restricted Suppliers, have not been convicted by a court of law for fraud and corruption during the past five years, have not had any contract between the bidder and any organ of state being terminated during the past five years on account of failure to perform on or comply with the contract

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT ITHALA SOC (LTD) MAY REJECT THIS QUOTATION OR ACT AGAINST ME IN TERMS OF ITS SCM POLICY SHOULD THIS DECLARATION PROVE TO BE FALSE.

Signature

Date

Position

Name of Bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

a) The applicable preference point system for this tender is the **80/20** preference point system.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “**tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed as per the table in the conditions of tender (Page 2) (To be completed by the tenderer)
Black Ownership	20	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.2. Name of company/firm.....

4.3. Company registration number:

4.4. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.5. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.1, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:
DATE:
ADDRESS: