

169 Main Street  
Private Bag 53  
Umzimkhulu  
3297



Email: [info@umzimkhulum.gov.za](mailto:info@umzimkhulum.gov.za)  
Tel: (039) 259 5000/5300  
Fax: (039) 259 0427

## BUDGET & TREASURY DEPARTMENT

PROVINCE OF KWAZULU-NATAL  
KZN 435

Date issued 24/04/2023.  
KZN435/22/23/012/BTO

### INVITATION TO TENDER UMZIMKHULU LOCAL MUNICIPALITY

uMzimkhulu Municipality hereby invites reputable and experienced Service providers to respond on the projects below:

TENDER NAME	TENDER NUMBER	BRIEFING DATE
PROVISION OF INSURANCE SERVICES (60 Month Contract)	ULM-BTO 005/23	04/05/2023 @ 10h:30 am.

Tender documents will be available on the municipal website ([www.umzimkhulum.gov.za](http://www.umzimkhulum.gov.za)) and will also be available from the cashier at 169 Main Street, uMzimkhulu, 3297 upon the non-refundable payment of R200 per document or a bank guaranteed cheque made out to uMzimkhulu Municipality during working hours between 09:30am and 16:00pm from the 28<sup>th</sup> of April 2023; cut-off time for buying documents is the 04<sup>th</sup> of May 2023, 15 minutes before the briefing time.

Compulsory briefing meeting is scheduled to take place at uMzimkhulu Municipality Makhosini Building, 247 Mzimkhulu Mlonyana Street, uMzimkhulu 3297.

Invalid or non-submission of the following documents will render the Tenderer disqualified; Specific Goals points will not be allocated if the required documents are not submitted / invalid.

- Registered on Central Suppliers Database (CSD) attach proof of Registration.
- MBD 4, 8 & 9 -
- Municipal rates and services certificate / statement / billing for the directors, owners, shareholders of the company and for the company to confirm that Municipal rates are not in arrears for more than 90 days or.
- Attach valid lease agreement if the company is leasing the office space.
- Attach a valid lease agreement if the director is leasing accommodation.
- Attach affidavit if the account is under your parents, siblings, grandparents, and you are not paying any Municipal rates.

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Copy of a marriage certificate if Municipal account in under your spouse.

- Certificate of Authority” to sign all documents in connection with this tender and any contract or agreement which may arise therefrom, duly signed and dated, shall be provided by the Board of Directors of the firm and shall be attached and must be on a Company letter head. (Example is provided in the tender document)

**80/20 Preference Point System will be used on the following project and uMzimkhulu Local Municipal SCM policy.**

### Second Phase

#### Evaluation criteria Functionality

**Minimum threshold 30 points or 60%**

Criteria	Points Allocation	Verification Method
<b>1. Company experience</b>  Company experience in provision of insurance services to municipalities		1. Duly signed reference letter(s) of the organisation where the insurance services were provided
<ul style="list-style-type: none"> <li>▪ Three projects in the provision of insurance services to municipalities</li> </ul>	20	
<ul style="list-style-type: none"> <li>▪ Two projects in the provision of insurance services to municipalities</li> </ul>	10	
<b>2. Experience of company's lead consultant</b>		Curriculum Vitae (CV) clearly showing experience of a lead consultant and finance-related

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<p>Experience and finance qualifications of a lead consultant that will be assigned to the contract</p> <ul style="list-style-type: none"> <li>▪ consultant with finance qualifications and with five years working experience as an insurance consultant</li> <li>▪ consultant with finance qualifications and with three years working experience as insurance consultant</li> </ul>	<p>20</p> <p>10</p>	<p>qualifications certificates of the lead consultant</p>
<p><b>3. Accreditation</b> Registration with Financial Sector Conduct Authority (FSCA) or Financial Intermediaries Association of South Africa (FIA)</p> <ul style="list-style-type: none"> <li>▪ Registration with FSCA or FIA</li> </ul>	<p>10</p>	<p>Membership certificate with FSCA or FIA</p>

**NB: It is compulsory for a bidder to score not less than 50% per segment in the above table. Even if the bidder has scored the 60 % of threshold but scores less than 50% on one or more of the segments above the bidder will be non-responsive.**

**It is compulsory for bidders to score 100% on accreditation.**

The 80/20 scoring will apply.  
80 - Price

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### 20 - Specific goals

#### Specific Goals

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Verification document(s)
<b>Specific goals 2: RDP Goals (Maximum points 20)</b>		
Promotion of south African owned enterprises	20	1. CIPC registration Certificate (Companies and Intellectual Property Commission)  And Detailed CSD report  2. Certified Copy RSA Identity document of the director(s)
TOTAL / MAXIMUM POINTS	20	

#### 120 days Price Validity

All Technical enquiries shall be directed to:

Attention : Mr B. Mvuyana  
Telephone : (039) 259 5044  
Fax No : (039) 259 0427  
Email Address : [mvuvanab@umzimkhululm.gov.za](mailto:mvuvanab@umzimkhululm.gov.za)

SCM Compliance enquiries shall be directed to:

Attention : Miss O. Basi

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## BUDGET & TREASURY DEPARTMENT

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KZN 435

Telephone : (039) 259 5034  
Fax No. : (039) 259 0427  
Email Address : [basio@umzimkhulum.gov.za](mailto:basio@umzimkhulum.gov.za)

### Closing date

Tender documents in a sealed envelope clearly indicating the **tender number and tender Name**, must be deposited in the tender box of uMzimkhulu Local Municipality, located at 169 Main Street, uMzimkhulu, 3297 reception area, not later than **12h:00, 23<sup>rd</sup> of June 2023**. Telegraphic, telex, telephone, electronic, facsimile and late tenders will not be accepted.

Tenders may only be submitted along with the tender documentation provided by the municipality.

**The uMzimkhulu Municipality Council does not bind itself to accept the lowest bidder. uMzimkhulu Municipality Supply Chain Management policy will apply.**

  
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C.A NGQOYIYA  
MUNICIPAL MANAGER