

**TENDER 150C/2025/26 - PROVISION OF SERVICE PROVIDER:  
BROKER TO ADMINISTER THE GROUP LIFE SCHEME FOR THE  
EMPLOYEES OF THE CITY OF CAPE TOWN**

**SITE CLARIFICATION PRESENTATION**

# **TENDER REQUIREMENTS OVERVIEW**

# Purpose and Focus Areas

## Eligibility Compliance

Tenderers must fully comply with mandatory requirements, including Conditions of Tender, tax compliance, and returnable schedules.

## Functionality Requirements

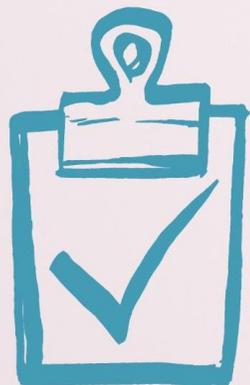
Tenderers need to achieve a minimum functionality score to qualify for financial evaluation, ensuring capability and experience.

## Schedule F.13 Documentation

Schedule F.13 includes essential evidence of client base, service quality, insured lives, and Lead Broker Consultant competency.

## Responsiveness Test

Clause 2.3.7.1 ensures submitted tenders meet structural, administrative, and substantive requirements before evaluation.





# **ELIGIBILITY REQUIREMENTS**



## **General Eligibility Criteria**

### Tender Submission Requirements

Submissions must be clear, irrevocable, and fully comply with all Conditions of Tender to be valid.

### Returnable Schedules Completion

All returnable schedules F.1 to F.13 must be accurately completed and submitted with signatures where required.

# Additional Eligibility Requirements

## Financial Service Provider Registration

All tenderers must be registered with the Financial Sector Conduct Authority as authorized service providers in insurance.

## Lead Broker Compliance

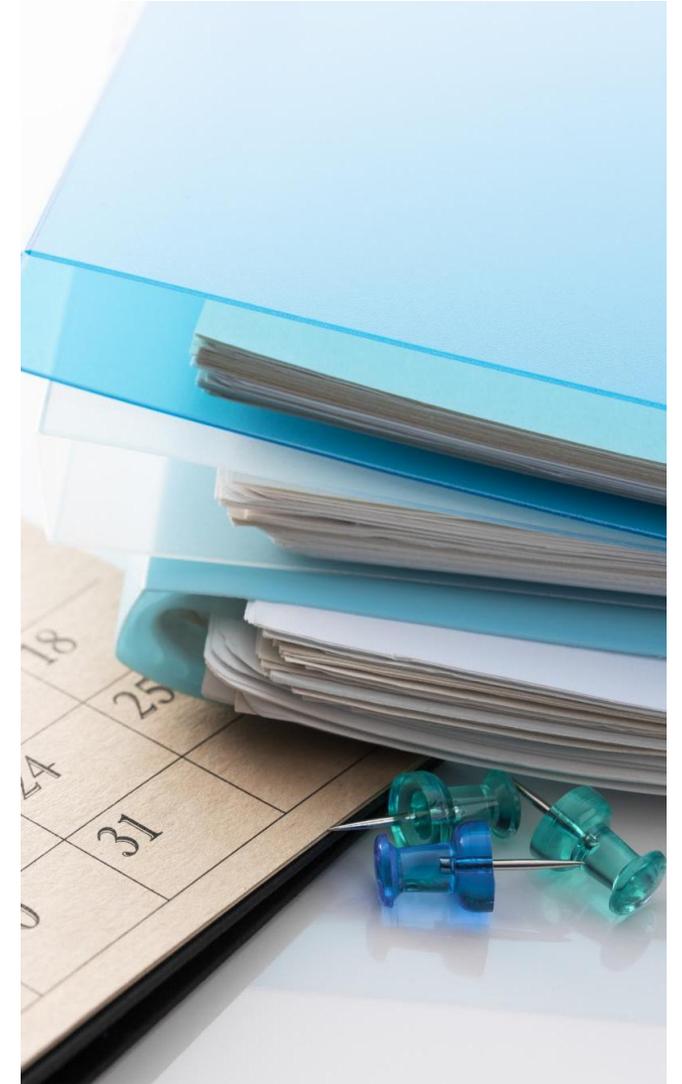
The nominated Lead Broker Consultant must hold a valid FAIS certificate and letter of good standing to demonstrate compliance.

## Document Submission Deadline

Tenderers must submit all requested supporting documents together with the tender submission. **No proof of registration may result in the bidder being declared as non-responsive.**

## Ensuring Regulatory Compliance

These requirements ensure only compliant and accredited providers are shortlisted, reducing operational and legal risks.



# **FUNCTIONALITY EVALUATION**

# Functionality Scoring Framework

## Functionality Evaluation Purpose

Evaluation ensures tenderers meet minimum operational and experience standards before pricing is considered.

## Weighted Evaluation Criteria

Four criteria with specific point weights assess government client base, corporate clients, coverage, and consultant experience.

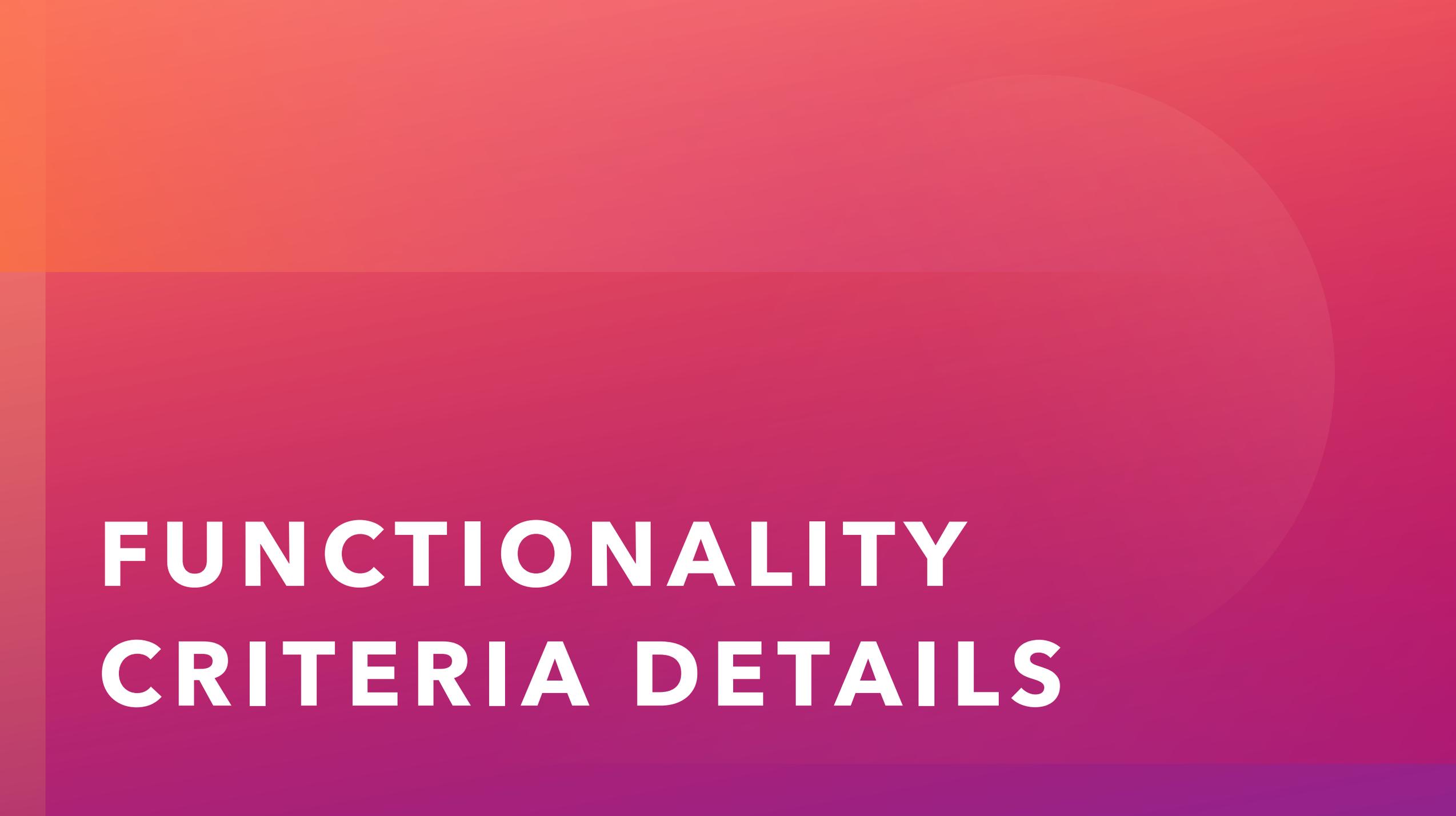
## Documentation and Verification

Points are awarded only with correctly formatted, verifiable documentary evidence submitted by the tenderer.

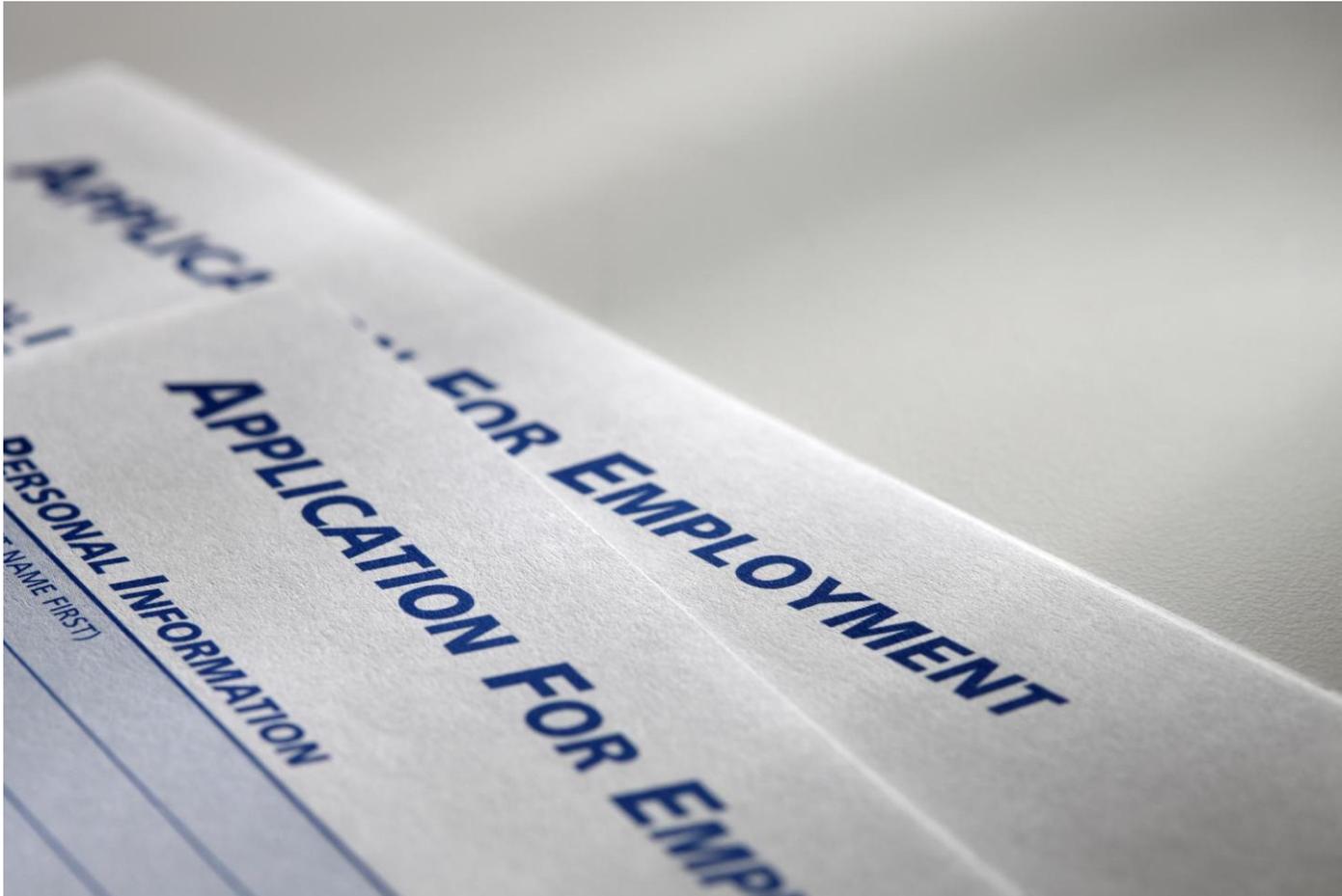
## Impact of Incomplete Submissions

Incomplete or missing evidence can reduce scores below the minimum threshold, affecting tender progression.





# **FUNCTIONALITY CRITERIA DETAILS**



## **Government Client Base (10 Points)**

### **Scoring Based on Client Number**

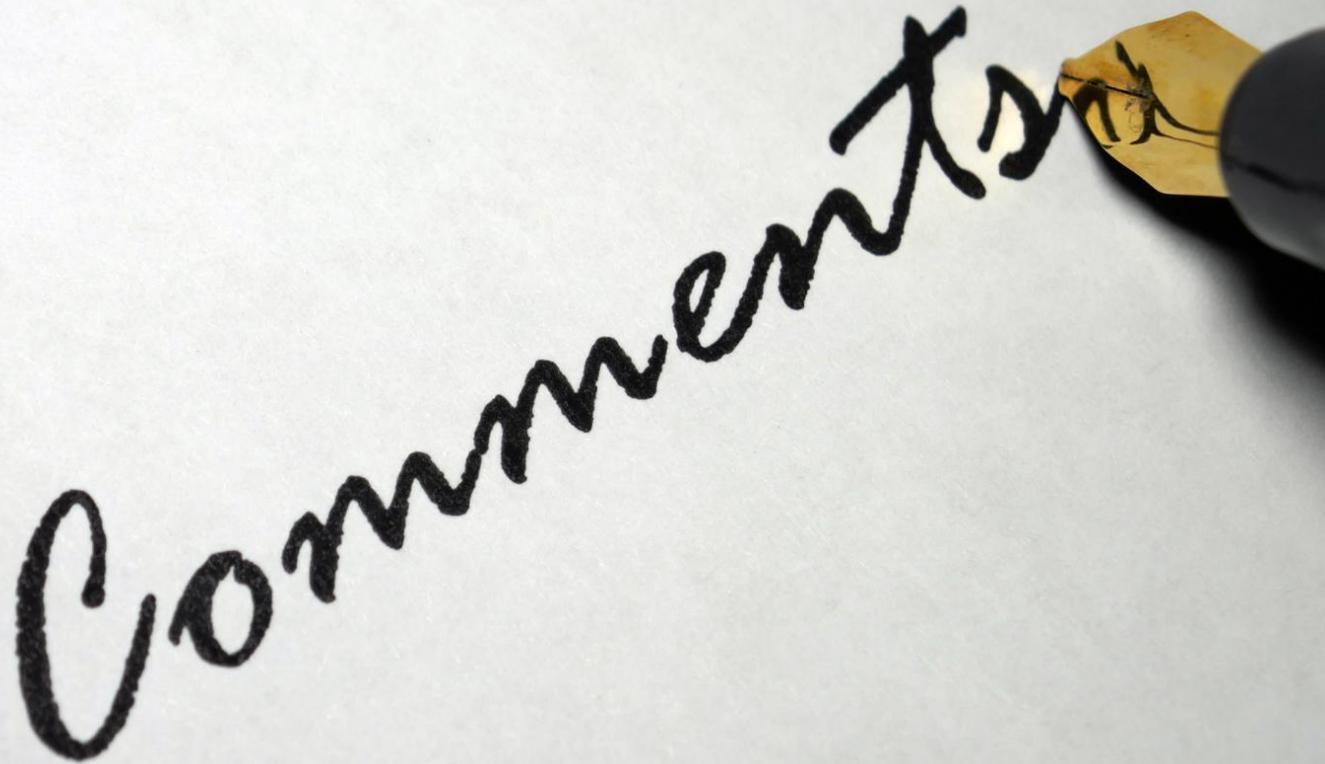
Points are awarded depending on the number of active government clients serviced by the tenderer.

### **Verification Requirement**

Points are granted only if clients are verified by formal letters of recommendation with service details.

### **Ensuring Capability Assessment**

Verification ensures accurate assessment of the tenderer's experience and sector-specific competence.



Comments

## **F.13(a) Government Client Information**

### Detailed Client Information

Tenderers must provide official names, service scopes, durations, and authorized contacts for all active government clients.

### Letters of Recommendation

Each government client must provide a recommendation letter specifying services rendered and service timeframe.

### Evaluation Impact

Failure to submit letters results in zero points regardless of clients listed, impacting functionality scoring.





# Corporate Client Base (30 Points)

## Client Qualification Criteria

Clients must each have a workforce of at least 5,000 employees to qualify for scoring under this criterion.

## Scoring Bands

Points range from zero to thirty based on the number of qualifying verified corporate clients listed by the tenderer.

## Verification Requirement

Tenderers must provide recommendation letters clearly stating services delivered and contract duration for verification.

## Operational Capacity Indicator

A large corporate client portfolio indicates strong operational capacity and high service quality.



# F.13(b) Corporate Client Information

## Corporate Client Details

Tenderers must provide organization names, services rendered, covered members, and service duration for each client.

## Recommendation Letters

Formal letters of recommendation are mandatory to verify the tenderer's ability and professionalism.

## Functionality Scoring Criteria

Clients must have at least 5,000 employees to qualify for functionality scoring in the tender process.





## **Number of Lives Covered (30 Points)**

### **Portfolio Size Measurement**

The criterion measures insurance portfolios by the number of individual lives covered under risk brokerage agreements.

### **Scoring Bands**

Scoring ranges from zero to thirty points based on portfolio size from under 100,000 to over 400,000 lives covered.

### **Verification Requirement**

Tenderers must submit an independent auditor's letter verifying the exact number of lives covered.

### **Ensuring Data Reliability**

Independent auditing prevents misrepresentation and helps assess tenderers' true operational capacity.



## **F.13(c) Auditor Confirmation of Lives Covered**

### **Requirement for Auditor Letter**

Tenderers must submit an official letter from an independent auditor verifying lives covered under brokerage administration.

### **Essential Auditor Details**

The letter must include the auditor's name, job title, contact phone number, and email for authentication purposes.

### **Purpose and Impact**

Verification prevents unchecked claims and affects functionality scoring under Criterion 3 based on lives covered.

<b>Schedule F.13: Information to Be Provided With the Tender</b>
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**Schedule F.13 (c) Audit letter to confirm number of lives covered under broker services.**

The tenderer must provide an official confirmation **letter from their independent auditor** verifying the total number of lives insured under current broker services or policies administered by the bidder **and also complete the table below.**

**The letter must:**

- 1 Be dated and signed.**
- 2 Be submitted on the letterhead of the audit firm, addressed to the tendering entity; and**
- 3 Include the total amount of active lives insured under current broker services as per the most recent audit conducted.**

Name of Audit Firm	Contactable person	Job Title of contactable person	Contact Number	Contact Email



## Lead Broker Consultant Experience (30 Points)

### Experience Scoring Criteria

Consultant experience is scored from zero to thirty points based on verified years in the industry.

### Verification Requirements

Detailed CV and at least three contactable references are required for experience verification.

### Impact of Verification

Unverified or missing information can negatively affect the consultant's and tenderer's scoring and functionality.



## **F.13(d) Lead Consultant CV and References**

### **Comprehensive CV Requirements**

The CV must include full name, title, contact info, employment history, education, and a 150-200 word professional summary.

### **Contactable References Needed**

At least three references must be provided to verify experience, responsibilities, and performance in similar roles.

### **Importance of Accurate Documentation**

The City emphasizes complete and verifiable documentation as the Lead Consultant is key personnel for contract delivery.

### Schedule F.13: Information to Be Provided With the Tender

#### Schedule F.13 (d) Lead Consultant experience.

The tenderer is required to provide details of the experience of the Lead Broker Consultant by completing the template below.

#### Curriculum Vitae Template

##### 1. Lead Broker Consultant Details:

Full Name and Surname	
Current Position/Title	
Employer (Current)	
Employment Start Date (Current Role)	
Email	
Phone	

##### 2. Summary Profile (150–200 words):

Provide a concise overview of your brokerage experience, sector focus (e.g., group risk, health, employee benefits), key client segments, and notable achievements.

##### 3. Qualifications & Professional Development:

Name of Qualification	Institution	Year Completed

##### 4. Relevant Experience (Lead Broker Consultant):

Organisation Name	Position Held:	Start Date	End Date	Referee Name	Referee Contact Number



# **TEST FOR RESPONSIVENESS**



# Responsiveness Criteria (Clause 2.3.7.1)

## Mandatory Responsiveness Test

Clause 2.3.7.1 requires a mandatory test to verify if tenders meet administrative and structural requirements.

## Compliance Screening Process

The Bid Evaluation Committee screens tenders for completeness, authorized signatures, and mandatory schedules.

## Ensuring Fairness and Transparency

Non-responsive tenders are excluded to ensure fairness, transparency, and adherence to procurement rules.

# Material Deviations and Impact

## Definition of Material Deviations

Material deviations are changes affecting scope, quality, performance, risk, or competition fairness.

## Examples of Material Deviations

Examples include incomplete pricing, altered terms, missing schedules, and unapproved qualifications.

## Consequences of Deviations

Tenders with material deviations must be rejected according to Conditions of Tender policies.

## Importance of Compliance

Submitting accurate, complete, and unqualified offers on official documents is essential.

