inseta

INSURANCE SECTOR EDUCATION AND TRAINING AUTHORITY

*EMPOWERED TO **INFLUENCE** AND **INSPIRE!***

BID NUMBER: TENDER-INS/2025/26/003

Tender documents are obtainable from 31 October 2025 from the following websites:

- ETender Portal
- INSETA Website

Closing Date: 24 November 2025 @11:00

Delivery: INSETA Office, 18 Fricker Road, Illovo, Sandton.

For enquiries contact the INSETA Supply Chain Management at bids@inseta.org.za

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Telephone: 011 381 8900
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TERMS OF REFERENCE

APPOINTMENT OF A HIGHER EDUCATION INSTITUTION TO PROVIDE A POSTGRADUATE EXECUTIVE AND MANAGEMENT LEADERSHIP COACHING AND MENTORING PROGRAMME TO THE INSURANCE SECTOR EDUCATION TRAINING AND AUTHORITY'S (INSETA).

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 Insurance Sector Education and Training Authority (INSETA) therefore seeks to appoint a competent professional, experienced, and accredited service provider in a form of a Higher Education Institution to offer Coaching and Mentoring services for INSETA's five (5) Executives, sixteen (16) Managers and eight (8) Senior Specialists over a period of twelve (12) months.

2. SCOPE OF WORK

2.1. INSETA has identified a need for one-on-one Executive and Management coaching and mentoring services to be provided to INSETA for five (5) Executives, sixteen (16) Managers and eight (8) Senior Specialists over a period of twelve (12) months.

2.2. The objective is to enrich learning and development, to enhance INSETA's leadership impact and effectiveness to drive organizational culture and business performance. To further to create a succession pool for the management and executive roles within the organization.

2.3. The practice of executive coaching and mentoring may involve many coaching and mentoring approaches and tactics, however INSETA's focus is more on executive coaching and mentoring which may address many aspects of the executive's performance, leadership style, career or personal life issues, in line with the organization's Succession and Retention Policy, and the Excellence Model.

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2.4. The Excellence Model is anchored around the four foundation pillars guiding the turnaround processes. The four interrelated pillars are the mandate, impact, systems and people. The people pillar primarily impacts on all HR related policies and procedures for organisational turnaround to achieve the legislative mandate, strategic objectives as well as the Annual Performance Plan of INSETA.

2.5. The coaching and mentoring services must include the following:

2.5.1. Develop the coaching and mentoring plan for INSETA Executives, Managers and Senior Specialists.

2.5.2. Coaching and mentoring sessions will be conducted monthly over a period of twelve (12) months.

2.5.3. Executive and Management coaching and mentoring sessions will consist of Executive and Management coaching and mentoring sessions will consist of six (6) compulsory one-on-one (contact) sessions at its campus or alternative satellite campuses and six (6) compulsory virtual sessions.

2.5.4. All travel costs will be at the expense of the bidder.

2.5.5. The bidder must provide premises for in contact sessions within its campus or provide alternative satellite campuses in Johannesburg only to host all participants. Should the bidder not have premises/satellite branches in Johannesburg, they should be willing to procure such at own cost.

2.5.6. The service provider must conduct the relevant management assessments of the participants to identify the developmental areas for a customized individual and group coaching and mentoring programme.

2.5.7. Design a customized programme which will result in the certification of the participants at the end of the programme.

2.5.8. The implementation of the coaching and mentoring plan through sessions must focus on the specific competencies and areas identified as per the assessments.

2.5.9. The relevant management assessments will be used to develop the customized coaching and mentoring programme.

2.5.10. To be most effective systemically, the programme will need to involve a partnership amongst executive, coach, and the organization.

2.5.11. The individual goals of executive coaching and mentoring engagement must always link back to and support strategic organizational objectives.

2.5.12. Executives, Managers and Senior Specialists will receive an individual written report on the outcome of the assessments as well as a personalized individual plan.

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2.5.13. Supply individual written reports on the outcome of the relevant management assessments to each Senior Specialist, Manager and Executive confidentially.

2.5.14. Guide and support Executives, Managers and Senior Specialists on critical emotional intelligence techniques.

2.5.15. Provide monthly reports on the progress made regarding the coaching and mentoring outcomes to the INSETA HR division.

2.5.16. Provide a high-level report to the CEO on a quarterly basis, or as and when required on the overall impact of the coaching and mentoring services; and

2.5.17. To submit a final close-out report to the INSETA HR division and CEO with recommendations at the end of the coaching and mentoring programme.

3. PROJECT OUTCOME

Coaching and mentoring is a systematic process for equipping leaders to lead and managers to manage effectively. The project is aimed at helping INSETA to build the scientific foundation and best practices of leadership, wellness, and personal coaching and mentoring. coaching and mentoring INSETA's desired outcomes for the coaching and mentoring services are the following:

3.1 Cultivate personal and professional development by creating more opportunities to function more effectively as a leader and in the various teams.

3.2 Tactical problem solving.

3.3 Developing leadership capabilities and new ways of thinking and acting that generalize other situations and roles.

3.4 "Learning how to learn": developing skills and habits of self-reflection that ensure that learning will continue after coaching and mentoring ends.

3.5 Targeted talent development through coaching and mentoring for the participants.

3.6 At the end of the 12 months the participants must be able to coach and mentor their team members.

3.7 Broaden awareness and understanding of management in uncertain environments, this will allow participants to apply their learning outcomes to identify and implement the Excellence Model in their teams throughout the organization.

3.8 Equip the participants with skills acquired to effectively navigate and manage organisational change and create a positive and innovative organisational culture.

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4. MODE OF COMMUNICATION

4.1. The sessions are to be conducted as customised to six (6) one-on-one (contact) sessions and six (6) virtual sessions. All sessions are compulsory for all participants.

4.2. The bidder must provide premises for in contact sessions within its campus or provide alternative satellite campuses in Johannesburg only to host all participants. Should the bidder not have premises/satellite branches in Johannesburg, they should be willing to procure such at own cost.

4.3. The group sessions must be a combination of in contact and virtual sessions.

4.4. The coaches and mentors must be available for informal coaching and mentoring sessions during the implementation of the programme as and when required.

5. EXPECTED APPROACH AND DELIVERABLES

5.1. Due to various methods of coaching and mentoring having grown in popularity over the past few years, it is important to differentiate and define the various methods so that leaders and the organization are aware of what will be delivered. Coaching and mentoring have become more of a commodity, making it harder to distinguish coaching and mentoring most effective methods of coaching and mentoring for the organisation.

5.2. Bidder to provide a credit bearing certificate upon successful completion of the programme to the participants.

5.3. Review existing valid psychometric reports for participants and implement interventions customised to individual gaps and developmental areas.

5.4. Conduct psychometric assessments for participants whose psychometric reports are no longer valid /does not exist through.

5.5. The assessments need to be conducted through a registered psychometrist and implement interventions customised to individual gaps and developmental areas.

5.6. The Executive coaching and mentoring may involve several coaching and mentoring approaches described below:

5.6.1. Twelve (12) sessions customised as six (6) one-on-one (contact) sessions and six (6) virtual sessions. All travel costs will be at the expense of the bidder.

5.6.2. The bidder must provide premises for in contact sessions within its campus or provide alternative satellite campuses in Johannesburg only to host all participants.

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5.6.3. Should the bidder not have premises/satellite branches in Johannesburg, they should be willing to procure such at own cost.

5.6.4. Group sessions –Four (4) sessions at the venue (including catering) provided by the bidder at their own cost within Johannesburg for Executives, Managers and Senior Specialists. All travel costs will be at the expense of the bidder.

5.6.5. The bidder must provide premises for in contact sessions within its campus or provide alternative satellite campuses in Johannesburg only to host all participants. Should the bidder not have premises/satellite branches in Johannesburg, they should be willing to procure such at own cost.

5.6.6. All sessions are compulsory for the participants.

5.6.7. Peer coaching and mentoring.

5.6.8. Performance coaching and mentoring.

5.6.9. New leader / onboarding transition coaching and mentoring.

5.6.10. High potential / development coaching and mentoring.

5.6.11. Coaching and mentoring for 360 debriefing and development planning.

5.6.12. Targeted behavioural coaching and mentoring.

5.6.13. Personal/life (emotional intelligence) coaching and mentoring.

5.6.14. Succession coaching and mentoring.

5.6.15. Public speaking /presentation coaching and mentoring.

5.6.16. Health coaching and mentoring

5.6.17. Stress Management coaching

5.6.18. People Management skills

6. PERFORMANCE MEASURES

6.1. The performance measures for the delivery of the coaching and mentoring services will be closely managed and monitored by INSETA HR division.

6.2. The INSETA HR division will be responsible for the management of the Service Level Agreement.

6.3. Performance review meetings will be part of the Service Provider and Client's performance review measures.

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7. UNSATISFACTORY PERFORMANCE

7.1 In the event that the Service Provider fails to meet the performance standards outlined in this ToR or SLA, INSETA shall where applicable raise remedies, terminate the contract, seek damages or raise penalties such as impose financial penalties to the Service Provider.

7.2 The following shall be considered examples of unsatisfactory performance:

7.2.1 Failure to meet the agreed-upon deadlines.

7.2.2 Failure to deliver goods or services that meet the agreed-upon standards.

7.2.3 Failure to respond to client inquiries or issues in a timely manner.

7.2.4 Failure to maintain confidentiality or security of client information.

7.2.5 Gross negligence by the service provider or its employees.

8. REPORTING

8.1. The Service Provider will submit monthly and quarterly progress reports to the INSETA HR division within five (5) days after the end of each month and quarter for the duration of the programme.

8.2. Such reports will need to be presented to INSETA HR division, within the first 7 working days of the month.

8.3. The same reports will need to be presented to Executive Management team/CEO and other structures should it be necessary for governance and reporting purposes.

8.4. The service provider will submit quarterly progress reports to the CEO and as and when required avail themselves for a meeting to discuss the report.

8.5. On completion of the programme, the service provider will within 30 days provide a final closing report that would have also been presented, clarified and all inputs given incorporated into the report.

9. PROJECT CONTINUITY AND PROFILES OF SENIOR STAFF ON THE PROJECT

9.1. The Service Provider must ensure the availability of the Project Leader and Administration staff in charge of the project for the duration of the contract.

9.2. Should the Project Leader leave the project, a period of at least one month is required in which a replacement (Project Leader) with similar expertise and equal years of experience appointed to be able to transfer skills and knowledge.

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10. TIMEFRAMES

10.1. The duration of the actual implementation of the project will be twelve (12) months, however the contract duration will be fifteen (15) months for purposes of ensuring a seamless administration process which will include reporting and project hand-over.

11. CONTRACTUAL OBLIGATION

11.1. Bidders to fully complete **SBD 3.1** including all applicable costs.

11.2. In a case where the service provider uses sub-contractors, the former will be responsible for ensuring delivery of services and payment for such sub-contractors.

11.3. The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place **(upon parties contracting).**

11.4. Bidders should fully comply with the relevant SCM Legislative Framework as well as application of regulatory and prescripts. Bidders are also required to take all reasonable steps to protect information, in line with the provisions of the POPIA.

11.5. An alternate replacement of resource(s) should be equal or more competent to the initial approved resource(s).

12. ABSENCE OF OBLIGATION & CONFIDENTIALITY

12.1. 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.

12.2. The Contract site is at INSETA offices at 18 Fricker Road, Illovo, Sandton, 2196 **(as and when required).**

13. WORKMEN AND SUPERVISION ON SITE

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

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14. EVALUATION CRITERIA

14.1. Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria are designed to reflect the INSETA's requirements in terms of identifying a suitable service provider and ensure the selection process is transparent and affords all the bidders a fair opportunity for evaluation and selection.

The evaluation criteria will be based on the following phases/requirements:

- Phase 0: Administrative requirements
- Phase 1: Mandatory Requirements
- Phase 2: Price and Specific Goals.

15. ADMINISTRATIVE REQUIREMENTS (Phase 0)

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

15.2. Bidder must complete, sign and submit a Standard Bidding Document (SBD 1) Procurement Invitation.

15.3. **Standard Bidding Document (SBD 4) Bidder's Disclosure**.

15.4. Standard Bidding Document (SBD 6.1) Preference Points Claim form.

15.5. Initialled General Conditions of Contract (GCC).

15.6. **Bidder must provide BBBEE Certificate (accredited by SANAS only) or Sworn Affidavit (in as prescribed or CIPC or DTI template).**

16. MANDATORY REQUIREMENTS (PHASE 1)

The following compulsory requirements must be submitted:

16.1. The bidder must be a registered Council for Higher Education (CHE) and submit proof thereof.

16.2. The bidder must submit a minimum of two (2) profiles from their facilitators/coaches indicating 5 years or more of Coaching and Mentoring experience and coaching accreditation from a recognised institution/professional body.

16.3. The bidder must submit a detailed Methodology and Project Execution Plan with timeframes aligned to the contract period.

Note:

- **Non-compliance with the above-mentioned compulsory requirements will mean**

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automatic disqualification.

- **Only bidders who submit the compulsory requirements as prescribed will be considered for further evaluation Phase 2 – Price and Specific goals.**

17. PRICE AND SPECIFIC POINTS EVALUATION (PHASE 2)

17.1. **Preference Points Applied Against Specific Goals**

The tender responses will be evaluated on the **80/20 preference point system for acquisition of goods or services with Rand value equal to or below R50 million.**

17.1.1. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

17.1.2. 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.

The maximum points for this tender are allocated as follows:

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

18. POINTS AWARDED FOR PRICE AND PREFERENCE POINTS

(1) The following formula will be used to calculate the points out of 80 for price in respect of an invitation for a tender with a Rand value equal to or below R50 million, inclusive of all applicable taxes:

$$Ps = 80\left\{1 - \frac{(Pt - P\,min)}{P\,min}\right\}$$

Where:

Ps = Points scored for comparative price of bid under Consideration

Pt = Comparative price of bid under consideration

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Pmin = Comparative price of lowest acceptable bid

(2) A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender.

(3) The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.

(4) Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

19. SPECIFIC GOALS PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

19.1. Table 1: Specific goals for the RFQ or bid process and points claimed are indicated per the table below.

19.2. ***80/20*** *preference point system is applicable, corresponding points must also be indicated as such. 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-point system)**
Black Ownership • 6 points for 100% black owned • 3 points for 75-99% black owned • 1 point for 51-74% black owned	(Maximum points = 6 points)
Women Ownership • 6 points for 75% - 100% • 3 points for 51% - 74% • 1 point for below 51%	(Maximum points = 6 points)
Youth Ownership • 5 points for 75% - 100% • 3 points for 51% - 74% • 1 point for Below 51%	(Maximum points = 5 points)
Company-owned by People with disabilities • 3 points	(Maximum points = 3 points)
Total	20

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Note: Evidence to be submitted by Service Providers: Emerging Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) – sworn affidavit (DTI or CIPC Template), Generic entities – B-BBEE certificate (SANAS accredited) and CSD report.

19.3. 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.

19.4. 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.

20. Bid Procedure Conditions: Counter Conditions

20.1. Award Criteria:

20.1.1. INSETA reserves the right to screen the bidder in terms of its own Bid Evaluation Committee (BEC) before appointment, should such screening results have a negative outcome, the INSETA reserves the right not to award the bid to the subjected/recommended/highest scoring bidder.

20.1.2. The INSETA reserve a right not to award a bid to the highest scoring bidder but to award to a service provider who meet the requirement fully.

20.1.3. INSETA reserve a right to conduct due diligence to confirm the contactable reference letters / reference documents provided. The due diligence method will be determined by the INSETA which may include requesting reference letters from the referee.

20.1.4. The total number of participants will be confirmed upon award, thereafter payment will be made based on the number of participants coached and mentored.

20.1.5. The INSETA draws the bidders' attention that amendments to any of the Bid Conditions or setting of counter conditions by bidders will result in the invalidation of such bids.

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21. When bidding as the following:

21.1. Consortium

21.1.1. 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.

21.1.2. 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 delignates the rights and obligations of each member.

21.1.3. 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 an 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

21.1.4. 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

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Treasury. The foregoing ensures compliance from an SCM process perspective that the consortium is in order.

21.1.5. Of importance is that in a consortium, each individual team members retain their identities.

21.2. **A joint venture**

21.2.1. A joint venture is a business entity created by two or more parties, generally characterized by shared ownership, returns and risks and shared governance.

21.3. **Unincorporated joint venture**:

21.3.1. 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) Tax pin
d) CSD registration.
e) The JV agreement will direct which bank account of the two entities will be used.
f) Consolidated Joint BBBEE Certificate.

21.4. **Incorporated joint venture:**

21.4.1. 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) Tax pin
d) CSD registration.
e) The JV agreement will direct which bank account of the two entities will be used.
f) Consolidated Joint BBBEE Certificate.

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22. COMMUNICATION

22.1. 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.

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

23. CONDITIONS TO BE OBSERVED WHEN BIDDING

23.1. 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:

23.2. Not evaluate and award a bid that do not comply strictly with this BID document.

23.3. 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 theterms of reference.

23.4. Contact any bidder during the evaluation process, in order to clarify any information, withoutinforming any other bidders. During the evaluation process, no change in the content of the BID shall be sought, offered or permitted.

23.5. Cancel this BID at any time as prescribed in the PPPFA.

23.6. Should bidder(s) be selected for further negotiations, they will be chosen on the basis of theof cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

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24. ANONYMOUSLY REPORTING OF FRAUD

24.1. Bidders are encouraged to report any incidents of • fraud • corruption • theft • misconduct or •unethical behaviour to the Vuvuzela Hotline. Contact number: 0800 119 691

25. COST OF BIDDING

25.1. 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 forany such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

26. NOTE TO BIDDERS:

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

END OF TERMS OF REFERENCE DOCUMENT