



**Minutes of the Tender Briefing Session - Tender Reference: 150C/2025/26**

<b>PROJECT MANAGER:</b>	Fred Prince	150C/2025/26: Provision of Service Provider: Broker to Administer the Group Life Scheme for the Employees of the City of Cape Town
<b>LOCATION:</b>	Ms Teams	
<b>DATE:</b>	12 February 2026	
<b>TIME:</b>	10h00-11h00	

#	Discussion
1.	<b>Opening and Welcome</b> The session was opened by Fred Prince, who welcomed all attendees and outlined the purpose of the meeting: to provide clarity on the tender 150C/2025/26 and address any questions from prospective tenderers.
2.	<b>Overview of Tender Requirements</b> The Chair provided an overview of the tender scope, which includes the provision of a broker to administer the Group Life Scheme for the employees of the City of Cape Town.
3.	<b>Purpose and Focus Areas</b> The purpose of the site clarification was to discuss and highlight eligibility criteria, functionality, completion of returnable schedules as well as test for responsiveness as required in accordance with Conditions of Tender 2.3.7.1.
4.	<b>Eligibility Requirements</b> Tenderers were advised that tenderers are required to meet the following additional eligibility criteria and supply specific documentation when requested: <b>4.1. Proof of Registration as a Financial Service Provider (FSP)</b> <ul style="list-style-type: none"><li>• Tenderers must provide evidence that they are registered as an Financial Service Provider (FSP) with the Financial Sector Conduct Authority (FSCA).</li></ul> <b>4.2. Proof of Lead Broker Consultant Compliance</b> <ul style="list-style-type: none"><li>• Tenderers must ensure and provide documentation that their Lead Broker Consultant:<ul style="list-style-type: none"><li>○ Is registered in terms of the Financial Advisory and Intermediary Services (FAIS) Act.</li><li>○ Can provide a valid FAIS certificate.</li><li>○ Can provide a letter of good standing.</li></ul></li></ul> <b>4.3. Submission Timeline</b> <ul style="list-style-type: none"><li>• Tenderers were advised that, where the required documents are not submitted at tender stage, tendering entities shall, upon request, submit all the above documentation within 14 calendar days of receiving the request.</li></ul> <b>Failure to submit the required documents within the stipulated timeframe will render the tender non-responsive.</b>
5.	<b>Functionality</b> <b>5.1. Government Client Base Evidence (10 Points)</b> Tenderers are required to provide verifiable evidence of their active government client base.  This includes a list of all current government clients being serviced. Scoring will be based on the number of active government clients declared.

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	<p>Verification is mandatory and points will only be awarded if each client is confirmed through formal letters of recommendation with service details.</p> <p><b>Tenderers must complete Schedule F.13(a), which requires:</b></p> <ul style="list-style-type: none"> <li>• Official names of each government client.</li> <li>• Description of services rendered.</li> <li>• Duration of current service relationship.</li> <li>• Contact person’s name and surname, contact number and email address</li> </ul> <p><b>In addition to completing corresponding Schedule F.13(a), for each government client listed, tenderers must submit an official recommendation letter that includes:</b></p> <ul style="list-style-type: none"> <li>• Services rendered by the tenderer</li> <li>• Period during which services were provided</li> <li>• Confirmation of service quality</li> </ul>
	<p><b>5.2 Corporate Client Base Evidence (Worth 30 Points)</b></p> <p>Tenderers are required to demonstrate the size and strength of their corporate client portfolio. Points are awarded based on the number of qualifying, verified corporate clients.</p> <p><b>Tenderers must complete Schedule F.13(b), which requires the submission of a detailed list of corporate clients for whom they provide brokerage services, including:</b></p> <ul style="list-style-type: none"> <li>• Corporate client organisation name.</li> <li>• Description of services rendered.</li> <li>• Number of “lives/members” covered under brokerage.</li> <li>• Duration of the current contract.</li> <li>• Contact person (name, surname, phone number, email address).</li> </ul> <p><b>In addition to completing corresponding Schedule F.13(b), for each corporate client listed, tenderers must provide a formal letter of recommendation that includes:</b></p> <ul style="list-style-type: none"> <li>• Confirmation of services rendered</li> <li>• The duration of the contract</li> <li>• Verification of performance and service quality</li> </ul>
	<p><b>5.3 Number of lives currently covered under brokerage services</b></p> <p>Tenderers are required to provide independent verification of the total number of lives covered under their current brokerage services.</p> <p><b>Tenderers must complete the table in Schedule F.13(c), which requires:</b></p> <ul style="list-style-type: none"> <li>• Name of the audit firm</li> <li>• Contactable person</li> <li>• Job title of contactable person</li> <li>• Contact number</li> <li>• Contact email</li> </ul> <p><b>In addition to completing Schedule F.13(c), 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.</b></p>

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	<p><b>The auditor's letter must be:</b></p> <ul style="list-style-type: none"> <li>• Dated</li> <li>• Signed.</li> <li>• Submitted on the letterhead of the audit firm,</li> <li>• Addressed to the tendering entity; and</li> <li>• Include the total amount of active lives insured under current broker services as per the most recent audit conducted.</li> </ul> <p><b>5.4 Lead Consultant experience</b></p> <p>Tenderers must submit comprehensive and verifiable documentation demonstrating the experience and suitability of the proposed Lead Broker Consultant, who is considered key personnel for contract delivery.</p> <p><b>Tenderers must provide a detailed Curriculum Vitae (CV) by completing Schedule F.13(d), which requires:</b></p> <ul style="list-style-type: none"> <li>• The full name and surname of the Lead Broker Consultant;</li> <li>• The Lead Broker Consultants current position/title;</li> <li>• The Lead Broker's Current employer</li> <li>• Employment start date in the current role</li> <li>• The Lead Broker's email address and phone number</li> <li>• A 150–200 word professional summary, outlining: <ul style="list-style-type: none"> <li>○ Brokerage experience</li> <li>○ Sector focus</li> <li>○ Client segments served</li> <li>○ Notable achievements</li> </ul> </li> <li>• Tenderers must also provide Qualifications and Professional Development by listing: <ul style="list-style-type: none"> <li>○ Name of each qualification</li> <li>○ Institution where it was obtained</li> <li>○ Year completed</li> </ul> </li> <li>• Tenderers must provide three contactable references for the Lead Broker Consultant. Each reference must include: <ul style="list-style-type: none"> <li>○ Organisation name</li> <li>○ Position held by the Lead Broker Consultant</li> <li>○ Start and end dates of employment or service</li> <li>○ Referee name</li> <li>○ Referee contact number</li> </ul> </li> </ul>
6.	<p><b>1. Mandatory Responsiveness Test (Clause 2.3.7.1)</b></p> <p><b>Tenderers are informed that their submissions will undergo a mandatory responsiveness test. This test checks whether the tender:</b></p> <ul style="list-style-type: none"> <li>• Meets all administrative requirements</li> <li>• Includes all required structural components</li> <li>• Contains all mandatory schedules and documents</li> </ul> <p>Only tenders that meet these requirements will proceed to the next stage of evaluation.</p> <p><b>Tenderers are advised that every submission will be screened to ensure:</b></p> <ul style="list-style-type: none"> <li>• Mandatory forms are completed</li> <li>• Signatures are properly provided</li> </ul>

#	Discussion	
	<ul style="list-style-type: none"> <li>• All required documents are included</li> <li>• No information is missing or incomplete</li> </ul> <p>Tenderers are reminded that a responsive tender is one that conforms to all the terms, conditions, and specifications of the tender documents without <b><u>material deviation or qualification</u></b>.</p> <p>A material deviation or qualification is one which, in the CCT's opinion, would:</p> <ol style="list-style-type: none"> <li>a) Detrimentally affect the scope, quality, or performance of the goods, services or supply identified in the Specifications,</li> <li>b) Significantly change the CCT's or the tenderer's risks and responsibilities under the contract, or</li> <li>c) affect the competitive position of other tenderers presenting responsive tenders, if it were to be rectified.</li> </ol> <p>Reject a non-responsive tender offer, and not allow it to be subsequently made responsive by correction or withdrawal of any material deviation or qualification.</p> <p>The CCT reserves the right to accept a tender offer which does not, in the CCT's opinion, materially and/or substantially deviate from the terms, conditions, and specifications of the tender documents.</p>	
7.	<b>Question</b>	<b>Response</b>
7.1	<p>Is it possible to get a schedule showing the pensionable salaries of all staff , their ages and gender for them to do a costing on the City's current risk structure and then for tenderers to then make a proposal on costing of the City's risk benefits.</p>	<p>The current tender is for the services of a broker consultant to manage the group risk portfolio.</p> <p>It is not a tender for the appointment of a new insurer.</p> <p>The City has a staff compliment of 30 000 +/- and that should give the tenderers and indication of what they could expect in terms of broker fees which is payable as a % of premiums.</p> <p>We do rebroke excises annually and the appointed broker consultant will do rebroke exercises in the future but at this point we not looking to do a rebroke exercise , we looking to appoint a broker consultant.</p>
7.2	Who is the current broker consultant appointed?	The current appointed broker consultant is Alexander Forbes.
8.	<p><b>Closing Remarks</b></p> <p>The Chair thanked all attendees for their participation. It was confirmed that the official responses to questions would be compiled and released via an official notice. Bidders were</p>	

#	Discussion
	encouraged to carefully review the tender documents and submit comprehensive, compliant proposals.



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