

REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A PROFESSIONAL TRAINING PROVIDER TO DELIVER ONLINE TRAINING ON INNOVATIVE TECHNOLOGY TOOLS TO IRBA'S MANAGEMENT FORUM.

RFQ NO.: IRBA/RFQ/OPERATIONS/MANAGEMENTTRAINIG /01/2025

CLOSING DATE & TIME: 10 February 2025 @ 12h00PM

RFQ VALIDITY PERIOD: 60 working days (from the RFQ closing date)

RFQ DESCRIPTION: Appointment of a professional training provider to deliver online training on innovative technology tools to IRBA's Management Forum.

1. Bidders are invited to submit their quotations for the supply of the abovementioned services, according to the Terms of Reference and conditions, as outlined in this document.
2. This quotation is subject to the General Conditions of Contract and, where applicable, any other special conditions of contract.
3. Kindly note that the quotations should be submitted as follows:
 - a) Via an electronic submission and be emailed to pmualusi@irba.co.za before or on the closing date and time of this RFQ. Email sizes have been restricted to 15MB per email.
 - b) Responses must be submitted in an electronic format only and be emailed to the dedicated email address, as provided herein. Those sent to any other email address, other than the one specified herein, will be disqualified and not considered for an evaluation. So, it is the bidder's responsibility to ensure that the proposal is sent to the correct and dedicated RFQ email address and received by the IRBA before the closing date and time.
 - c) All questions must be emailed to pmualusi@irba.co.za on or before **04 Feb 2025**.
4. Service providers must not have any links to an audit firm (or network firm) nor any individual registered with the IRBA.
5. Late quotations will not be accepted.

TERMS OF REFERENCE

The IRBA invites suitably qualified service providers to submit proposals with quotations for the provision of training on innovative technology tools to IRBA's Management Forum.

BACKGROUND OF THE IRBA

The IRBA is a Schedule 3A public entity in terms of the Public Finance Management Act No. 1 of 1999 (PFMA). Governed by a Board that gets appointed by the Minister of Finance, the IRBA was established in terms of Section 3 of the Auditing Profession Act 26 of 2005, as amended (APA), which had an effective date of 1 April 2006. The objectives of the Act, as set out in Section 2, are as follows:

- a) To protect the public in the Republic by regulating audits performed by registered auditors.
- b) To provide for the establishment of an Independent Regulatory Board for Auditors.
- c) To improve the development and maintenance of internationally comparable ethical standards and auditing standards for auditors that promote investment and as a consequence employment in the Republic.
- d) To set out measures to advance the implementation of appropriate standards of competence and good ethics in the auditing profession.
- e) To provide for procedures for disciplinary action in respect of improper conduct.

1. SCOPE OF WORK

The IRBA, seeks, appoint a professional training provider to deliver online training on innovative technology tools to its staff, particularly the members of the IRBA's Management Forum, who comprises of approximately 57 participants majority professionally qualified personnel, as more specifically set out herein below. The appointed service provider will be expected to provide the following :

1.1. Introduction to Innovative Technology Tools:

- a) An overview section that introduces the concept of innovative technology tools, their importance in the modern workplace.
- b) How these tools can be leveraged across different job functions within the organization.
- c) Explaining and demonstrating how some of the current technology tools available within the IRBA can be used more efficiently or innovatively.
- d) Explaining to candidates where to start on the journey regarding technology usage

1.2. Provide focused training for staff on both basic and advanced technology tools for everyday job functions, including:

- a. Training on Co-pilot and task automation. In addition, the Facilitator must have conducted training on any of the following four (04) platforms: Office 365 applications i.e. Advance MS Excel, Microsoft Workflow, Ms SharePoint and one drive, New Teams Features and New Outlook; and an introduction to Power BI.

1.3. Provide Hands-on Exercises and Application:

Each module should include practical, hands-on exercises that allow participants to directly apply what they've learned using real or simulated work scenarios. This should involve case studies, project work, or the use of sandboxes for safe experimentation with the tools

1.4. Change Management and Adoption Strategies:

Provide guidance on managing the transition to new technologies within teams or departments, covering best practices in change management, strategies for encouraging adoption among staff, and how to address common resistance or challenges.

Safe use of technology tools from a confidentiality perspective

1.5. Future Trends and Continuous Learning:

Provide insights into emerging technologies and trends on the horizon, emphasizing the importance of continuous learning and adaptation to stay ahead in a rapidly evolving technological landscape.

The selected service provider must submit CVs of the facilitator/coach detailing relevant qualifications, with evidence of at least five successful similar coaching programs facilitated in the past three years.

2. REQUIRED SKILLS AND COMPETENCIES

2.1. The bidder must demonstrate an extensive knowledge and expertise in facilitating innovative technology tools or similar training programme.

2.2. The bidder must demonstrate the following key competencies:

- a) Expertise and proficiency in facilitating innovative technology tools.
- b) Strong project management skills to coordinate sessions and ensure the training aligns with IRBA training requirements.
- c) The selected service provider must submit CVs of the facilitator/trainer detailing relevant qualifications, with evidence of at least five successful similar training programs facilitated in the past three years as set out in the scope of works at paragraph 2.2.
- d) The prospective service provider's trainer/facilitator should have a minimum of five (5) years proven experience in conducting training in innovative technology tools.
- e) The prospective service provider's trainer should be in possession of the following

qualifications: Appropriate university degree in BSC Computer Science or Equivalent

3. Duration and method of delivery:

Duration:

2 days training (Maximum) of 4 hour sessions per day. The training will be conducted via Microsoft teams on a date that will be mutually agreed upon between IRBA and the appointed service provider.

Certification

Certification of attendance is required. No portfolio of evidence.

4. **SERVICE PROVIDER MINIMUM REQUIREMENTS**

4.1. **Evaluation Stages**

First Stage: Eligibility Criteria/Mandatory Requirements

This will be to assess compliance with the submission of the mandatory documents/information. Only proposals that are 100%-compliant at this stage will be evaluated further.

Second Stage: Functionality

Bid responses will be evaluated in accordance with the functional criteria listed below and the associated points indicated. Bidders have to achieve a minimum score of 70 points out of the 100 and a minimum qualifying score per criteria, as set out in the evaluation criteria, to progress to the next stage. Failure to achieve any of the minimum scores will result in a disqualification for further consideration, even if the overall minimum total score has been achieved.

Third Stage: Pricing and Specific Goals

Proposals that are compliant with the first and second stage evaluations will be assessed further in terms of the 80/20 preference point system. This is in line with the IRBA's commitment to achieve government's transformation targets.

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

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

Where:

Ps = Points scored for the comparative price of the bid under consideration

Pt = Comparative price of the bid under consideration

Pmin = Comparative price of the lowest acceptable bid

4.2. Pricing Schedule Requirements

Service providers must ensure that the price quotations are inclusive of all applicable taxes, including value-added tax (VAT). The costing must include all the relevant services proposed in the bid submission. Bidders are required to submit financial proposals as per the Pricing Schedule (Table B) under point 6 below on a company letterhead.

The Pricing Schedule is compulsory, and bidders must ensure that it is completed without changing the structure. Failure to complete it in the prescribed manner and with unauthenticated alterations may result in the disqualification of the bid during the financial evaluation process.

4.3. Points Awarded for Special Goals Requirements

In terms of Section 3(1) of the Preferential Procurement Policy Framework Act 5 of 2000 Preferential Procurement Regulations 2022, the following applies:

An organ of state must, in the tender documents, stipulate -

- (a) the applicable preference point system as envisaged in regulations 4, 5, 6 or 7; and*
- (b) the specific goal in the invitation to submit the tender for which a point may be awarded, and the number of points that will be awarded to each goal, and proof of the claim for such goals in accordance with the table below.*

Specified Goals for the Preferential Point System	Points Specified Goals	Allocation
Enterprise with ownership of 51% or more by person/s who are Black	10	
Enterprise with ownership of 51% or more by person/s who are women	5	
Enterprise with ownership of 51% or more by person/s who are youth	3	
Enterprise with ownership of 51% or more by person/s with a disability	2	
Total Points		20

To qualify for preference points, the bidder must submit the following proof documents together with the proposal for the 80/20 evaluation criteria. Failure to submit the supporting documents will not disqualify the bidder but will result in the allocation of zero points.

Procurement Requirement	Proof Documents
Black People/Ownership	Central Supplier Database (CSD) Report/Black Economic Empowerment (BEE) Certificates/Affidavit
Women	CSD Report/BEE Certificates
Disabled (living with a disability)	CSD Report Medical Certificate/Report

Procurement Requirement	Proof Documents
Youth	CSD Report
Joint Venture	Joint Venture Agreement CSD Reports
<i>The CSD Report will be used for the verification of the ownership percentage.</i>	

4.4. Evaluation Criteria

Stage 1: Eligibility Criteria/Mandatory Requirements

Service providers must comply with the minimum conditions indicated below in order for their proposals to be considered.

- a) **National Treasury – Central Supplier Database:** Service providers must submit confirmation of their company or individual registration on the CSD. The IRBA will not award any bid to a service provider that is not registered as a prospective supplier on the CSD, as required in terms of National Treasury Circular No. 3 of 2015/2016 and National Treasury Supply Chain Management Instruction Note 4 of 2016/2017. The CSD registration requirement applies to all companies/individuals.
- b) Provide a comprehensive course outline which must be compliant with the IRBA scope of work together with detailed training programme.
- c) Bidders must submit price quotations that are **inclusive of VAT** (if applicable) with their proposals. The Pricing Schedule is compulsory, and bidders must ensure that it is completed without changing the structure. Failure to complete it in the prescribed manner and with unauthenticated alterations to the pricing will lead to the disqualification of the bid.
- d) The following completed Standard Bidding Documents (SBDs) must be submitted:
 - SBD 4: Declaration of Interest Form; and
 - SBD 6.1: Preference Point Claim Form in terms of the Preferential Procurement Regulations, 2022.

Stage 2: Functionality

Service providers must be fully compliant with the below functionality mandatory requirements in order to be evaluated further. Failure to comply with all of these functionality mandatory requirements will result in the disqualification of the bid. Bidders are required to indicate whether they comply or do not comply with the minimum requirements; and attach supporting information as part of their proposal.

Where bidders fail to meet all of the functionality mandatory requirements and/or fail to provide the supporting information as part of their proposal, they will not be considered further in the evaluation i.e. stage 3: Pricing & Specific Goals.

Table A: Functionality Evaluation Criteria

No.	Functionality Criteria	Comply/Do not Comply
1.	<p><u>Company Overview</u></p> <p>The bidder must present an overview of the company, addressing the following aspects:</p> <ul style="list-style-type: none"> (i) The Service Provider 's company overview indicating training on innovative technology tools experience and list of clients indicates wherein similar work was done submitted and reflective of a vast experience in training on innovative technology (ii) The company's clientele in the form of three (03) list of clients including scope work, which should reflect similar work done. 	
2.	<p>CVs of the Trainer or facilitator</p> <p>The bidder must submit the CVs of the facilitator/trainer detailing relevant qualifications, with evidence of at least five successful training programs facilitated in the past three years.</p> <p>Key personnel competency and qualification:</p> <ul style="list-style-type: none"> - The Trainer and/or facilitators must have minimum of five (5) years proven experience in conducting training in innovative technology tools - The Facilitator must have conducted training on Co-pilot and task automation. In addition the Facilitator must have conducted training on and any of the following four (04) platforms: Office 365 application i.e. Advance MS Excel, Microsoft Workflow, (Ms SharePoint and one drive, New Teams Features and New Outlook; and an introduction to Power BI . - The Facilitator /trainer must be in possession of university degree in BSC Computer Science or Equivalent qualification. 	

No.	Functionality Criteria	Comply/Do not Comply
3.	<p>Track record</p> <p>Service Providers must demonstrate relevant experience by providing minimum three (3) or more positive reference letters from contactable references in the provision of training on innovative technology tools (as per scope of work).</p> <p>To be valid, each client reference letter must detail the following:</p> <ul style="list-style-type: none"> - Clearly indicate the name of the bidder; - Specify the services rendered; - Contain the name(s) of the contact person(s) and their details (phone numbers/email addresses). <p>The IRBA reserves the right to verify the information provided</p>	

5. PRICING SCHEDULE

Bidders that comply with the requirements of this bid will be evaluated according to the preference point scoring system, as determined in the Preferential Procurement Regulations, 2022, pertaining to the Preferential Procurement Policy Framework Act. Points for this RFQ shall be awarded for Pricing and Specific Goals (refer to SBD6.1, Preference Points Claim Form).

- 5.1. Bidders must ensure that the price quotations are inclusive of all applicable taxes (including VAT). The costing must comprise all of the relevant services proposed in the bid submission. Bidders are required to submit financial proposals, as per Table B, on a company letterhead.
- 5.2. The Pricing Schedule (Table B) is compulsory, and bidders must ensure that it is completed without changing the structure. Failure to complete it in the prescribed manner and with unauthenticated alterations to the pricing may result in the disqualification of the bid during the financial evaluation process.
- 5.3. All pricing must be fixed and firm and inclusive of VAT and all costs to be incurred in delivering the services. The IRBA will not accept any disbursements subsequent to the award of the contract.

NB: The cost breakdown should include the following items:

- Training Materials
- Facilitation
- Assessment
- Certificate of attendance

Table B: Pricing Schedule

No.	Training Interventions	Price per Delegate	Quantity-maximum	Total Price (Excl. VAT)
	Need analysis, data gathering and planning		-	
2.	Innovative Technology Tools Training		57	
		Sub-Total		
		VAT		
		Total		

- IRBA reserves the right to reduce the quantity of staff, and should it be reduced, IRBA should only be billed for the actual employees.
- The service provider must be able to offer the certificate of completion or competence at the end of the programme.

6. CANCELLATION OF THE CONTRACT

6.1 Notwithstanding anything to the contrary, the IRBA shall be entitled to summarily terminate the service provider's appointment in the event of a material breach of their obligations under the SLA or any terms of appointment contained in an appointment letter, including but not limited to:

- a) Failure to deliver services to the IRBA's satisfaction.
- b) Failure to render services and/or regular updates timeously to the IRBA.
- c) Any involvement in a corrupt activity, including but not limited to offering a gift or remuneration to any officer or employee of the IRBA in connection with securing an appointment or executing a contract.
- d) Acting in bad faith or otherwise fraudulently in securing appointment or in the execution of the contract.
- e) Wrongfully and/or unlawfully influencing or attempting to influence the awarding of the IRBA's RFQ process.
- f) Engaging in any anti-competitive behaviour, including entering into any agreement or arrangement with any other person to refrain from quoting for this contract, or relating to the RFQ price to be submitted by either party.

g) Disclosing to any other person any information relating to this RFQ, except where disclosure in confidence was necessary to obtain quotations required for the preparation of the RFQ.

6.2 Any obligations imposed by the terms of the service provider's appointment, including the SLA, shall be applicable to any person with whom the service provider is associated in rendering the services to the IRBA.

6.3 The IRBA reserves the right to unilaterally terminate the contract with the successful service provider on a month's notice, in the event of circumstances beyond its control and that render continuation with the contract undesirable or unnecessary, without compensation to the service provider.

7 CONTRACTUAL ASPECTS

7.1. The contents of this document shall be deemed to constitute the Special Conditions of Contract applicable to this bid and shall be read together with the General Conditions of Contract issued in accordance with Chapter 16A of the Treasury Regulations.

7.2. Where, however, the Special Conditions of Contract are in conflict with the General Conditions of Contract, the Special Conditions of Contract shall prevail.

7.3. The bid document, together with the specifications contained in this document, shall constitute part of the contract.

7.4. Bidders shall not perform any work or render any services in terms of the contract, unless they are in receipt of a written instruction to that effect from the IRBA.

7.5. The successful bidder may not assign their own obligations.

7.6. The successful bidder must advise the IRBA immediately when it seems like unforeseeable circumstances will adversely affect the execution of the contract. Full particulars of such circumstances as well as the period of delay must be furnished to the IRBA, including project team changes that may affect the quality of the service.

8 DISCLAIMER

8.1 Service providers must make and rely on their own investigations and satisfy themselves as to the correctness of any and all aspects of the quotation. The IRBA will not be liable for any incorrect or potentially misleading information in relation to any part of this document and any accompanying quotation documents.

8.2 The IRBA reserves the right to not appoint any particular service provider that does not comply with the conditions of these Terms of Reference, or if information that could put the IRBA at risk is obtained about a service provider.

8.3 The IRBA reserves the right to cancel the Terms of Reference, should the budget to cover the

full quote not be available at the time of awarding the quotation, or if the need does not exist anymore or the specifications have changed.

9 ABSENCE OF OBLIGATION

No legal or other obligation shall arise between the service provider and the IRBA, unless and until the formal appointment documentation has been signed. The IRBA is not obliged to proceed with any service provider's proposal. Additionally, the IRBA reserves the right to request changes to any proposed consortia.

10 QUOTATION SUBMISSION REQUIREMENTS

- 10.1 The IRBA requires only **one submission** of the complete quotation documentation supporting the criteria stated above to be emailed to pmualusi@irba.co.za.
- 10.2 All documentation submitted in response to this RFQ must be in English.
- 10.3 The RFQ validity period is 60 working days from the closing date.
- 10.4 The service provider is responsible for all costs that they shall incur related to the preparation and submission of the quotation documentation.
- 10.5 The service provider should check the numbering of the pages of their quotation, to satisfy themselves that none is missing or duplicated. The IRBA will accept no liability in regard to anything arising from the fact that pages of a quotation are missing or duplicated.
- 10.6 The IRBA will not award any bid to a service provider that is not registered as a prospective supplier on the CSD, as required in terms of National Treasury Circular No. 3 of 2015/2016 and National Treasury SCM Instruction Note 4 of 2016/2017. The CSD registration requirement applies to all companies/individuals, including joint ventures and subcontracted companies.
- 10.7 The IRBA may elect to engage in detailed discussions with any service provider, with a view to maximise the benefits of this RFQ, as measured against the evaluation criteria, and fully understand a service provider's offer.
- 10.8 In its absolute discretion, the IRBA may invite some or all service providers to give presentations in relation to their submissions, and that may include a demonstration of software, programs or unique methodologies proposed, if applicable.
- 10.9 Besides presentations and discussions, the IRBA may request some or all service providers to:
 - a) Conduct a site visit, if applicable;
 - b) Provide additional information; and/or

c) Make themselves available for panel interviews.

11 OTHER

Any supply chain management enquiries may be directed to:

Phyllis Mualusi

Tel: +27 10 496 0614

Email address: pmualusi@irba.co.za

COMPLIANCE WITH PERSONAL INFORMATION PROCESSING LAWS

The Protection of Personal Information Act 4 of 2013 (POPIA) restricts the processing of personal information to circumstances that are lawful, legitimate, responsible and comply with its provisions.

The IRBA will have to process certain personal information, which is owned or held by bidders. Thus, to comply with the POPIA, the IRBA must provide bidders, whose personal information is processed, with a number of details pertaining to such processing, prior to the information being processed, which details are housed under the IRBA Procurement Processing Notice found on the IRBA website (<https://www.irba.co.za/library/popi-act>). You are requested to download and read the Notice. Please note that most of your personal information, which we will be processing, is required for lawful purposes and, as a result, your consent to process will not be required. However, where we do require your consent, which is indicated in the Notice, the handing over of such personal information to the IRBA will be viewed as consent to the IRBA's processing of such personal information.

Where the IRBA's personal information is provided for processing, the IRBA consents to the processing thereof, provided that you or any other recipient who processes it undertakes to process all and any such personal information strictly in compliance with the POPIA; and subject further that where the IRBA's personal information is not processed in accordance with the POPIA, then the person handing such information indemnifies and holds the IRBA and/or any third parties who may be or will be affected by such non-compliance harmless against all and any liabilities, loss or damages, including pecuniary, non-pecuniary and/or aggravated damages, which the IRBA or any data subject or other person may incur in consequence of such non-compliance, such person (who is processing the personal information) agreeing to pay to the IRBA and/or any affected data subject/s or third party/ies all and any such damages which they may have incurred as a result of such non-compliance on demand, and **no limitation of liability clauses** housed under this document or elsewhere **will under any circumstances limit the abovementioned damages.**

Where the IRBA provides personal information to you in terms of this document and you are tasked with processing it on behalf of the IRBA in your capacity as an "Operator", as defined under the POPIA, then in such case the provisions set out under the IRBA standard "**Operator Agreement/Addendum**" found on the IRBA website will apply to such processing, which terms will be incorporated into and read together with this document.