

THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY

Terms of Reference

THE APPOINTMENT OF SERVICE PROVIDER FOR THE PROVISION OF SHORT-TERM INSURANCE SERVICES FOR PSETA FOR A DURATION OF THREE (03) YEARS

No late applications will be accepted

Board members: Mr T Tshefuta (Chairperson) | Ms C Brink | Mr L Nzimande
Mr NN Maesela | Mr PB Makhafane | Mr MI Napo
Ms T Molefe-Sefanyetso | Mr PB Moopelwa | Ms L Dladla | Ms N Nzimande
Ms N Silinyana | Mr M Ramakgale

CEO: Ms B Lerumo

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1. INTRODUCTION

The Public Service Sector Education and Training Authority (PSETA) is a Sector Education and Training Authority (SETA) established in terms of section 9(1) of the Skills Development Act 97 of 1998 as amended and is classified as a National Public Entity under schedule 3A of the Public Finance Management Act, 1 of 1999.

This is done through appropriate, adequate, and accessible skills development, training, and education. The PSETA objectives are aligned with the Skills Development Act and those of the National Skills Development Plan (NSDP 2030). They emphasize the need to identify skills shortages and increase public sector investment in skills development, as well as return on investment.

PSETA has assets in place to enable smooth operation of its business in order to fulfil its mandate. This document outlines the criteria and requirements for the selection of a suitable service provider for Assets insurance to PSETA.

2. BACKGROUND & CONTEXT

The PSETA occupies two floors at 177 Dyer Road, Hillcrest Pretoria. The assets that need to be covered consists of both movable and immovable assets. The risk address is the PSETA office in Hillcrest where most of the assets are kept. An asset register is kept with all assets recorded therein.

The required insurance is from the date of contracting and shall continue for the period of 36 months, with premiums payable monthly. The insurance risk may be updated as and when required with both parties agreeing on the amount of cover with any additions or omissions included.

3. SCOPE OF WORK

The insurance required is to cover the PSETA as a going business concern against any financial losses which may result due to unforeseen risks including natural risks, theft, damage, fire and related risks that may result in complete or partial loss of assets. The cover is for replacement value of the assets to ensure business continuity. The risks for which a quotation is sought as detailed below.

3.1 ASSETS INSURANCE

- Insurance service for PSETA Assets
- The service to be rendered over the agreed upon period should include general services related to the replacement, maintenance, and administration of the insurance portfolio.
- Day to day correspondence and queries
- Monitor premium payments and refunds in accordance with accounts and statements.
- Keep PSETA to date with latest amendments in the Insurance legislations through meetings and workshops where necessary.

3.2. TECHNICAL REQUIREMENT IN RELATION TO ASSETS

To cover all assets belonging to PSETA or which PSETA has propriety interest against loss or damage and the assets are as follows:

- Electronic Equipment's include Laptops, Computers and related;
- Motor vehicles;
- Furniture and fittings include chairs, desks, and cabinets amongst other things; and
- Office equipment

3.3. INSURANCE

DESCRIPTION OF COVER	SUM INSURED
Motor Vehicles	
Comprehensive	
Polo Vivo SEDAN 1.4 Concept	R 167 007.72
Ford Eco sport SUV Trend 1.0	R 235 191.12
NISSAN GRAND LIVINA 1.6 ACENTA	R 79 599.34
Extensions	
• Contingent liability • Parking facility and movement of 3rd party Vehicle • Windscreen • Lock and keys • Radio/CD player • Car Hire • Wreckage removal	

Computer Equipment	
Laptops	R 2 526 530.69
Desktop	R 177 015.28
ICT Servers	R 3 644 676.13
Projectors	R 116 713.72
Furniture and Fittings	
Chairs, desks, cabinets, and other furniture items	R 2 456 776.26
Office Equipment	
Telephones, air conditioner, vacuums, and other office equipment items	R 156 022.66

4. TIMELINES OF THE CONTRACT

The minimum period for this assignment is three (3) Years, commencing from the date of signing the Service Level Agreement.

5. QUALITY AND REPORTING REQUIREMENTS

The Insurance Service provider will report directly to the Chief Financial Officer or to the delegated representative, as and when required.

6. PRICING

The proposed total pricing must be inclusive of VAT. The PSETA may require a breakdown of rates on any of the services/items priced and insurance providers are required to provide same. The PSETA reserves the right to negotiate the selection/prioritization of deliverables in line with the contract price.

7. EVALUATION PROCESS

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for Specific goals , once the minimum functionality criteria are met.

PHASE 1: FUNCTIONALITY EVALUATION

Bids must meet the minimum eligibility criteria in respect of functionality of 75 points out of 100 points that will be awarded for functionality before they are considered further. Any bid that does not meet the minimum eligibility threshold will be automatically disqualified.

PHASE 2

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goal once the minimum functionality criteria are met.

7.1 The evaluation will be based on:

Phase 1 : Functionality Evaluation		
Phase 2 : Preferential Point System	Points allocated for specific goals	Points
Price		80

Special goals		20
Black owned company	8	
Women	4	
Youth	5	
Disability	3	
Total		100



7.1.1. The functionality criteria together with the maximum points to be awarded are set out below:

Phase 1

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
1.	Experience	Number of years that the company has offered the insurance services as required by the terms of reference, i.e. broker to ensure services of underwriters as per clients' needs. Bidder to provide Company profile to articulate the number of years of experience.	5 = 10 and above the company has offered insurance services as required by the Terms of Reference. 4 = 8 to 9 years the company has offered insurance services as required by the Terms of Reference.	30

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			3 = 6 to 7 years the company has offered insurance services as required by the Terms of Reference. 2 = 4 to 5 years the company has offered insurance services as required by the Terms of Reference. 1 = less than 3 years the company has offered insurance services as required by the Terms of Reference.	

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
2.	History of successful delivery of the same or similar project(s).	- Bidder to provide signed letters from clients confirming your company's involvement, level of service and contact details for Insurance Broker Services for South African clients. - Bidder to include name of company, contact name and contact details. By inclusion in your response, you authorize PSETA to contact the references listed. Reference letters must be on a company letter head, signed and dated, otherwise they will not be considered.	1= 0 references in the past five years 2= one (1) to two (2) relevant reference in the past five years 3= three (3) references in the past five years 4= four (4) references in the past five years 5= five (5) references and above in the past five years	30
3.	Experience of the insurance Consultant in the field of insurance.	Service team: Team and Personnel Expertise and Experience Bidder to list the core team members, minimum three (3) that will be involved in the day-to-day servicing of	1= No submission of CV in experience 2= CV, and less than 5 years in experience	30

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
		the PSETA Portfolio (Size and composition of the teams to be assigned to PSETA account). The Bidder should provide a structure of the project team responsible for the execution of the project with their CV's to articulate adequate skills, qualifications and experience including proof of "Certificate in terms of Section 13 of the Financial Advisory and Intermediary Services Act" of the team members.)	• 3 = CV, a minimum of 5 years in experience with Qualification • 4 = CV and a minimum of 6 to 9 years in experience • 5 = CV with 10 years and above in experience	
4.	Electronic claims management system	• Bidder to provide details of the proposed electronic claims management system, as well as the location from where maintenance and support will be provided.	• 5 = Use of specialised electronic insurance claims management system • 1 = no use of /specialised electronic insurance claims management system	10

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
	Total			100

8. FORMAT OF THE BID SUBMISSION

8.1. Letter of Application

8.2. Company Profile

8.3. Track record and experience

8.4. Team member names and roles

8.5. Team members' CVs, certified copies of qualifications, and proof of "Certificate in terms of Section 13 of the Financial Advisory and Intermediary Services Act" of the team members.)

8.6. Proof of use of specialised electronic insurance claims management system

8.7. Reference letters

8.8. Proposals must be submitted in 3 copies, 1 original and 2 copies.

8.9. A valid Tax compliance status (TCS) PIN or proof of exemption from SARS.

8.10. Certified copy of BB-BEE certificate or affidavit

8.11. Copy of the registration document of the organisation (CIPC);

8.12. All Standard Bidding Documents (SBD) must be completed and signed.

- SBD 1
- SBD 4
- SBD 6.1
- Proof of registration on the Central Supplier Database.
- General Condition of Contract (each page signed).

NB: Failure to submit documents requested in section 8.12 will disqualify the proposal.

Bid proposals must be submitted to:

Ms Ursula Mathonsi

Manager: Supply Chain Management

The PSETA

Ground Floor, Woodpecker Building, Hillcrest Office Park, Lynwood, Pretoria

No late applications will be accepted.

No electronic bid applications will be accepted.

The Validity periods of the bids is 90 days from the closing date. Please direct all queries to Ms. Ursula Mathonsi via email on ursulam@pseta.org.za or telephonically on 012-423-5700