



Road Traffic Management Corporation

**APPOINTMENT OF A SERVICE PROVIDER
FOR PROVISION OF INSURANCE
SERVICES TO THE RTMC**

RTMC BID NO: 17/2021/22

CONDITIONS AND UNDERTAKINGS BY BIDDER IN RESPECT OF THIS BID

1. **Proprietary Information**

Road Traffic Management Corporation (RTMC) considers this bid and all related information, either written or verbal, which is provided to the bidder, to be proprietary of RTMC. It shall be kept confidential by the bidder and its officers, employees, agents and representatives. The bidder shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of RTMC.

2. **Enquiries**

- 2.1 All communication and attempts to solicit information of any kind relative to this bid should be channelled to the email below, however the cut-off date will be on the **24 January 2022**.

Name	RTMC
Email Address	Bidadmin@rtmc.co.za

- 2.2 All the documentation submitted in response to this bid must be in English.
- 2.3 The RTMC may respond to any enquiry in its sole discretion and the bidder acknowledges that it will have no claim against the RTMC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

3. **Validity Period**

Responses to this bid received from bidders will be valid for a period of **120 days** counted from the closing date of the bid.

4. **Supplier Performance Management**

- 4.1 Supplier Performance Management is viewed by the RTMC as critical component in ensuring value for money acquisition and good supplier relations between the RTMC and all its suppliers.
- 4.2 The successful bidder shall upon receipt of written notification of an award, be required to conclude SBD 7.2 and Service Level Agreement (SLA) with the RTMC, which will form an integral part of the agreement. The SLA will serve as a tool to measure, monitor and assess the Bidder 's performance level and ensure effective delivery of service, quality and value-add to RTMC business.

4.3 Should the successful bidder fail to sign the SBD 7.2 and the SLA when called upon to do so, the RTMC may without prejudice to any other rights it may have -

4.3.1 cancel the contract that may have been entered into between the successful bidder and the RTMC and the successful bidder shall pay to the RTMC any additional expenses incurred by the RTMC having either:

4.3.1.1 to accept any less favourable Bid or,

4.3.1.2 if new Bids have to be invited, the additional expenditure incurred by the invitation of fresh Bids and/ or by the subsequent acceptance of any less favourable Bidder.

5. **Instructions on submission of Bids**

5.1 Bids should be submitted as follows:

5.1.1 Technical envelopes

- Two (2) copies for technical responses/functional evaluation (1 Original and 1 copy)
- PDF soft copy in a memory stick of the technical responses/functional (to be enclosed in the envelope which contains the original document)

5.1.2 Financial envelopes

- Pricing schedule should be submitted separately Two (2) copies (1 Original and 1 copy)
- PDF soft copy in a memory stick of the pricing schedule (to be enclosed in the envelope which contains the original document)

5.2 All envelopes to be sealed and endorsed, **RTMC BID 17/2021/22: Appointment of a service provider for provision of insurance services to the RTMC for a period of five (05) years.**

5.3 The sealed envelope must be placed in the bid box at the Main Reception area of the **RTMC Eco Origin Office Park, Block F, 349 Witch-Hazel Street, Highveld, Centurion Ext 79, 0157** by no later than **11:00am on 4 February 2022.**

5.4 Compulsory Briefing session: Online/Virtual

5.4.1 The online/Virtual compulsory briefing session will be held on **14 January 2022 at 10:00am**.

5.4.2 Bidders are required to register for a compulsory briefing session by submitting necessary information to bidadmin@rtmc.co.za by not later than **12 January 2022 at 14:00pm** in order to be eligible to participate in the compulsory briefing and the bid process.

The following information is required to register for a briefing session:

- Company Name
- CSD Registration number
- Name and Surname of the Representative

Bidder/s who fail to comply with the above requirement will not be considered the compulsory briefing session.

5.4.3 Upon registration a link will be shared with the bidders to enable them to participate on the stated virtual meeting.

5.4.4 Bidders will be required to login using their company name, thirty (30) minutes before the starting time of the briefing session to allow for a virtual registration. Example, if the session starts at 10:00am bidders will be allowed to login at 09:30am and session will start promptly at 10:00am. No bidder/s will be allowed in the briefing session past the starting time.

5.4.5 After the briefing session, a signed briefing certificate will be emailed to all the bidders who were part of the online/virtual briefing session.

NB: The mentioned briefing certificate must be attached on the bid documents upon submission on the closing date of the bid. (Failing which will invalidate the bid)

5.5 The bidder's company name, closing date and the return address must also be endorsed on the envelope.

5.6 All bids submitted must be signed by a person or persons duly authorised thereto.

5.7 If a courier service company is being used for delivery of the bid document, the bid description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered into the bid box. The RTMC will not be held responsible for any delays where documents are not placed in the bid box before closing time.

5.8 Bid received by email, facsimile or similar medium will not be considered.

5.9 Where a bid document is not placed in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. **Late bids will not be considered.**

5.10 Amended bids may be sent in an envelope marked “**Amendment to Bid**” and should be placed in the bid box before the closing time.

5.11 Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by RTMC in regard to anything arising from the fact that pages are missing or duplicated.

6. Undertakings by the Bidder

6.1 The bidder accepts that all costs incurred in preparation, presentation and any demonstration in relation to this bid shall be for the account of the bidder.

6.2 The bidder hereby offer to render all or any of the services described in the attached documents to the RTMC on the terms and conditions and in accordance with the specifications stipulated in this bid documents (and which shall be taken as part of, and incorporated into, this proposal at the prices inserted therein).

6.3 The bidder shall prepare for a possible presentation should RTMC require such and the bidder shall be notified thereof no later than 4 (four) days before the actual presentation date. Such presentation may include demonstration of products or services as called for by the RTMC in relation to this bid.

6.4 The successful bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.

6.5 Bidders should note that should its Bid be accepted, and should the Bidder be unwilling or unable to commence the Services on the commencement date due to circumstances that are within its control, the RTMC shall be entitled, without prejudice to any other rights it may have

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6.5.1 to terminate the contract; or

6.5.2 claim specific performance from the successful bidder;

and claim damages from the successful bidder.

6.6 The bidder furthermore confirm that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents and that the price(s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accept that any mistakes regarding price(s) and calculations will be at his/her risk.

7. RTMC's Rights and Obligations

7.1 The RTMC reserves the right not to accept the lowest bid or any bid in part or in whole. RTMC normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is technically acceptable and/or financially advantageous to the RTMC.

7.2 The RTMC also reserves the right to award this bid as a whole or in part without furnishing reasons.

7.3 The RTMC reserves the right to conduct a site visit at the premises of the offices or at any client sites if so required.

7.4 The RTMC reserves a right to amend any bid conditions, validity period, specifications, or extend the closing date of bid prior to the initially stated closing date. Bidders will be advised in writing of such amendments in good time.

7.5 The RTMC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the RTMC to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

7.6 The RTMC acknowledge and agree that all data and Personal Information provided by the bidder to the RTMC, or to which the RTMC may be exposed, shall constitute Personal Information.

7.7 The RTMC hereby undertakes–

7.7.1 in favour of the bidder that it shall at all times strictly comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) and any other legislation related to the protection of Personal Information;

7.7.2 to use its best efforts to keep Personal Information confidential and shall not disclose any Personal Information to any other person except as required by law, save to the extent set out in this bid; and

7.7.3 not process Personal Information for any purpose other than to perform its obligations under this bid.

8. Supplier Development and Promotion of Emerging Black Owned Service Provider

8.1 The RTMC promotes enterprise development in this regard, successful bidders are encouraged to mentor SMME's and/or Youth owned businesses. The implications of such arrangement will be subject to negotiations between the RTMC and the successful bidder.

8.2 It is also the objective of the RTMC to promote transformation of the South African economy and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this bid would be undertaken by black owned entities.

8.3 To give effect to this requirement, bidders are required to submit a partnership/ subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring.

9. SPECIAL INSTRUCTIONS TO BIDDERS

- 9.1** Bidders shall provide full and accurate answers to the questions posed in this document.
- 9.2** Bidders **must** substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/technical requirements. All documents as indicated must be supplied as part of the bid response.
- 9.3** The RTMC reserves the right to sign a Service Level Agreement (SLA) with the service provider to supplement services in an agreement in this regard.
- 9.4** RTMC reserves the right to include any additional related items on the contract that are currently not part of the bid document.
- 9.5** The RTMC will not be held responsible for any costs incurred in the preparation and submission of bid documents.

NB: RTMC reserves the right to verify information provided by bidders and any misrepresentation will lead to disqualification of the bidder.

SECTION: 2

SPECIFICATION DETAILS AND FUNCTIONALITY REQUIREMENTS

SECTION 2: TECHNICAL REQUIREMENTS/ SPECIFICATIONS

1. PURPOSE

The purpose of this bid is to invite suitably qualified insurance service providers to render insurance services to the RTMC for a period of five (05) years.

2. BACKGROUND

2.1 The self-insurance model is a required method that as it is more cost-effective insurance solution for RTMC, on the motor vehicle fleet that operates nationally.

2.2 The Corporation intends to acquire an incorporated insurance covering both motor and non-motor assets on the basis that the motor cover terms should serve as self-insurance and a standard comprehensive business all risk insurance for Assets of the Corporation.

2.3 The premiums should be renegotiated on an annual basis.

2.4 It is against this background that the RTMC would like to hereby appoint suitably qualified insurance service providers to render insurance services to Road Traffic Management Corporation (RTMC) for a period of five (05) years.

3. SPECIFICATIONS / SCOPE OF WORK

3.1 RISK AREAS TO BE COVERED

ACCIDENTAL AND VIOLENT DAMAGE (PROTESTS) INCLUDING SUDDEN AND UNFORESEEN MECHANICAL OR ELECTRICAL FAILURE, FIRE, LOSS OR THEFT.	
DESCRIPTION	VALUE
1. ELECTRONIC EQUIPMENT/COMPUTERS	
1.1. Scanners, printers, servers	Asset register to be provided with values.
1.2. Computer equipment	
1.3. Laptops notepads, iPads	
1.4. Other related electronic equipment	

NB: Kindly note assets are movable between regions (Take note of the location on the asset register)

ACCIDENTAL AND VIOLENT DAMAGE (PROTESTS) INCLUDING SUDDEN AND UNFORESEEN MECHANICAL OR ELECTRICAL FAILURE, FIRE, LOSS OR THEFT.	
DESCRIPTION	VALUE
4. OFFICE EQUIPMENT AND FURNITURE FITTINGS	Asset register to be provided with values.
4.1. Office furniture	
4.2. Office equipment	

COMPREHENSIVE COVER (SELF INSURANCE)	
DESCRIPTION	VALUE
3. FLEET BREAKDOWN	Asset register to be provided with values.
3.1. Motor vehicle	
3.2. Buses	
3.3. Trucks	
3.4. Weighbridges and testing stations	
3.5. Trailers	
3.6. Tractors	
3.7. Simulators	
3.8. Motor bikes	
3.9. Evidentiary breath alcohol test vehicles (65 / 35seaters converted)	

THEFT OR LOSS, ACCIDENTAL DAMAGE AND OTHER RELATED RISKS	
DESCRIPTION	VALUE
1. Armoury – Glocks and Rifles	Asset register to be provided with values.

ALL BUSINESS RISK	
DESCRIPTION	VALUE
2. COMMUNICATION DEVICES	Asset register to be provided with values.
6.1. Cellular phones	
6.2. iPads and tablets	
6.3. Push to Talks (PTTs)	

THEFT OR LOSS, ACCIDENTAL DAMAGE AND OTHER RELATED RISKS	
DESCRIPTION	VALUE
3. GOODS IN TRANSIT	

ALL RISK COVER	
DESCRIPTION	VALUE
4. BUSINESS INTERRUPTION	
8.1. Increase in cost of working Public Utilities	

ALL RISK COVER	
DESCRIPTION	VALUE
5. PUBLIC LIABILITY	Ad-hoc basis as and when required

ALL RISK COVER	
DESCRIPTION	VALUE
10. PUBLIC LIABILITY	
10.1 RTMC Law Enforcement Operations in general (National Traffic Police)	
10.2 RTMC Road Safety Operations in general	
10.3 RTMC Traffic Training and Colleges related activities in general	
10.4 Board Members and Committees (Directors and Officer's liability)	
10.5 Statutory legal defence	
10.6 Employers liability including employee to employee	
10.7 Employers liability including employees against harm resulting from external parties	
10.8 Cover on rented vehicles and equipment (not owned by the corporation)	
10.9 Impounded movable assets	

3.2 ADDITIONAL INFORMATION TO BE SUPPLIED BY THE RTMC

3.2.1 In order to allow bidders to respond adequately to the bid, a schedule listing all assets will be provided.

3.2.2 The above exercise is aimed at ensuring uniformity in the response received from each prospective bidders and obtain structured framework for the evaluation of proposals.

3.2.3 The public liability proposal form will be completed by the RTMC on adhoc basis for event purposes

3.3 REPORTING

The following reporting must be provided on intervals to be determined by RTMC.

- Weekly claims progress reports
- Reconciliation of all claims data.
- Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.

- Performance Report recording any failures to achieve service levels, the cause of the failures and a summary of steps taken to resolve the failures and avoid them in the future.
- On-going evaluation of uninsured risks and possible options for addressing them.
- Updating the RTMC on the current state of the insurance market in terms of general economic realities, solvencies, capacity, profitability, rates and market activity and the possible impact of such matters on the RTMC's renewal strategy and insurance portfolio;
- Updating the RTMC on legal developments within the short-term insurance industry and informing the RTMC on insurance product developments in the South African market; and
- Reviewing the RTMC's short-term insurance portfolio with RTMC
- Online claims tracking system

3.4 ADVICE TO THE RTMC

- The service provider must provide appropriate advice on the short-term insurance portfolio in the event of the RTMC requesting such advice and assisting the RTMC with the interpretation of the insurance policy documents and matters incidental thereto, including the interpretation of the insurance rules and regulations.
- The service provider should further be able to review and advise on the short-term insurance requirements of the RTMC, have the necessary expertise and infrastructure to efficiently respond to insurance enquiries and needs of the entity.
- The service provider will be required to advise and consult with the RTMC on a renewal strategy, from time to time.

3.5 ADMINISTER CLAIMS

- The service provider will be required to assist in the claims management process from submission to finalisation and reporting. The service provider must ensure that the contractual rights of the RTMC in terms of the insurance policy are protected and enforced.
- The claims management process includes:
 - On-going management of all outstanding claims;
 - Receiving claims from the RTMC and processing them timeously;
 - Updating on progress of claims;
 - Informing the RTMC of outstanding documents on claims, if applicable;
 - Informing the RTMC when payments are made;
 - Ensuring correct calculation and payment of benefits
 - Online claims administration and tracking

3.6 CLAIMS LOGGING AND TRACKING

The service provider must be able to provide a system to the RTMC which will enable it to log and submit claims and to track the status of said claims. Automated system for logging of claims as well as the tracking of progress.

3.7 PERFORMANCE MEASURES

The performance measures for the insurance service will be closely monitored by RTMC.

- Quarterly progress meetings or as and when required
- Monthly claims history or as and when required
- 14 days turn-around time on the outcome of claims.
- Weekly reports

3.8 COMMUNICATION TO THE RTMC

The service provider shall be responsible for the following on an on-going quarterly or annual basis as appropriate:

- Update the RTMC on legal developments within the short-term insurance industry and inform the RTMC on short-term insurance product developments and the risk mitigation developments in the South African market.

3.9 TRANSITION

The service provider must:

- Deliver a transition plan to the RTMC, which sets out how it will take over the services from the previous service providers and how it will set-up its service delivery capability to deliver the services, as per their agreement, and
- Assist with the handover to a new service provider at the expiration or earlier termination of the Agreement.

3.10 SUPPORT

The service provider must provide:

- Training programmes, materials, processes, and guidelines
- One-on-one dedicated Claims Consultant

3.11 VALUE ADD SERVICES

The service provider is encouraged to propose value add services available to RTMC on an ongoing basis, share new trends in the industry and recommend any improvements thereto.

3.12 SUSTAINABLE PROCUREMENT

It is defined as a process whereby organizations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole-life cycle basis in terms of generating benefits not only to the organization, but also to society and economy, whilst minimizing damage to the environment.

In an endeavour to achieve the above-mentioned ideals, the Corporation has identified Corporate Social Responsibility (CSR) as one of the significant drivers and enablers in addressing socio-economic and environmental challenges facing local communities across the country.

CSR is generally used to describe the “concept” whereby companies integrate social, economic and environmental concerns in their business operations and in their interactions with their stakeholders on a voluntary basis.

Once the bid has been awarded an outline on CSR programmes to be funded will be provided for further engagement and agreement with the successful bidders.

SECTION: 3

EVALUATION CRITERIA

1. EVALUATION CRITERIA

The bid will be evaluated in the following stages:

(a) Stage 1 - Standard Compliance Requirements

Bidders are expected to submit and comply with all the required Standard Compliance Requirements. Failure to comply with these requirements, will lead to bidders being disqualified from evaluation. Below are Standard Mandatory requirements

- Bidders are required to submit 2 copies [One (1) Original plus one (1) Copy] and PDF soft copy in a memory stick. Documents submitted on soft copy must be the same documents as the hard copy (original). RTMC will not take responsibility for any disqualifications due to documents submitted on a soft copy, but not included on the original.
- All standard bidding documents must be duly completed and signed by authorised person. In case of a JV, Consortium or similar relationship/arrangements; bidders must submit standard bidding documents for entities in an arranged business relationship and accompanied by an agreement.
- Bidders must be registered with National Treasury Centralised Supplier Database.
- Compulsory Briefing Session Certificate

(b) Stage 2- Mandatory Requirements

Bidders who fail to meet the mandatory requirements will be disqualified from further evaluation.

(c) Stage 3 – Functionality Evaluation

This process comprises two steps:

- Step 1 will be on written responses/ proposals which consists of **70 points**.

NB: Bidders will be required to score a minimum of **50 points** in order to qualify for step 2.

- Step 2 will be on presentation which consist of **30 points**.

NB: Bidders will be required to score a minimum of **20 points**

Bidders will be required to score a minimum of **70 points** in order to qualify for a stage 4

- (d) **Stage 4 – Price and Preference Points Evaluation** Bidders will be evaluated on an 80/20 Preference Point System (i.e. 80 points on Price and 20 points on B-BBEE).

1.1 STAGE 1 – STANDARD COMPLIANCE REQUIREMENTS

NOTE: BIDDERS WHO FAIL TO COMPLY WITH BELOW STANDARD COMPLIANCE REQUIREMENTS WILL BE DISQUALIFIED FROM FURTHER EVALUATION.STANDARD COMPLIANCE REQUIREMENTS	Comply (Yes / No)
ENVELOPE ONE (1)	
Total Number of copies submitted – Two (2) (1 original and 1 copy) PDF soft copy in a memory stick	
Compulsory Briefing Session Certificate	
Proof of CSD Registration. (CSD number or report) Registration on CSD (available on www.csd.gov.za)	
SBD1: Invitation to bid and company information	
SBD4: Declaration of interest	
SBD8: Declaration of bidder's past supply chain management practice	
SBD9: Certificate of independent bid determination	
ENVELOPE TWO (2)	
Total Number of copies submitted – Two (2) (1 original and 1 copy) PDF soft copy in a memory stick	
Pricing schedule	
SBD6.1: Preference points claim form	

NB: Failure to comply with the above requirements will lead to a disqualification of the bid.

1.2 STAGE 2 – MANDATORY REQUIREMENTS

NOTE: A BIDDER WHO FAILS TO MEET THE ABOVE MANDATORY REQUIREMENTS WILL BE DISQUALIFIED FROM FURTHER EVALUATION

Item	Description	Comply Yes/No
1.	Financial Sector Conduct Authority (FSCA) Bidder must be licensed as a Financial Service provider in terms of Financial Advisory and Intermediary Services Act (FAISA). Compliance requirement: A certificate of registration must be provided for evaluation. Only certified copies (not older than three (03) months) will be accepted. NB: A copy of a certified copy will not be accepted.	
2.	The bidder must be a registered member of any of the following bodies: - Institute of Risk Management South Africa (IRMSA), - Insurance Institute of South Africa (IISA) - Financial Intermediaries Association of South Africa (FIA) Compliance Requirement The bidder must attach any of the following valid certificates. Only certified copies (not older than three (03) months) will be accepted. NB: A copy of a certified copy will not be accepted. • IRMSA membership certificate And/or • IISA membership certificate And/or • FIA membership certificate And/or • Any other professional bodies recognized by the financial industry	

NB: Failure to comply with the above requirements will lead to a disqualification of the bid.

1.3 STAGE 3 – FUNCTIONALITY CRITERIA

NB: FUNCTIONAL EVALUATION WIL BE SPLIT INTO TWO (2) STEPS. i.e. - STEP 1 – WRITTEN RESPONSE AND STEP 2 – PRESENTATION

STEP 1

Step 1 will be based on written proposals and shall be evaluated based on the following parameters for functionality:

DESCRIPTION	POINTS
References of Similar Work Done The bidder (Company) must provide a reference of similar work done (Assets insured for the value of R15 million minimum). • Similar work done for the value of R15 million – R30 million = 10 points • Similar work done for R31 million to R60 million = 20 points • Similar work done for R61 million and above = 30 points COMPLIANCE REQUIREMENT Bidders are expected to attach reference letters where similar services are currently and previously rendered. The following details must at least be reflected in the content:- • Name and short description of similar service rendered /involved in • Role and Responsibilities, • Duration of involvement, • Value of insurance cover • Contactable References. RTMC reserves a right to disqualify a bidder who provides inaccurate information and/or in instances where information submitted is found to be untrue.	30

B. Qualifications, Skills, Experience and Qualifications of proposed project team	20
The bidder's proposed personnel must have relevant insurance skills, qualifications, and minimum experience in line with Financial Sector Conduct Authority (FSCA) requirements. Bidder must provide abridged CVs and relevant qualification(s) for the following team members: 1. Team Lead/Account Manager = 10 Points Experience (05) The Team Leader/Account Manager must have at least five (5) years of experience as a team leader/accounts manager within the Insurance Industry ➤ 10 years and above = 5 Points ➤ 8 – 9 years = 3 Points ➤ 5 – 7 years = 2 Points Compliance Requirement CV indicating clearly number of years as a Team Leader/Accounts Manager within the insurance industry. Where a Team Leader/Accounts Manager has been with various organizations; the CV must clearly indicate the organizations and related period for each organization to enable the Corporation to calculate accurately the number of years. E.g. ✓ Name of Organisation Period 01 January 2010 to 31 December 2015 (Total Years – 5yrs) ✓ Name of Organisation Period 01 January 2015 to 30 June 2020 (Total Years – 4yrs 6months) Qualification (5) The team leader must be in possession of an industry specific certification for financial services providers and compliance officers as detailed in Board Notice 51 of 2017 (government Gazette no 40785 of 13 April 2017) Compliance Requirement The bidder must attach a <u>certified</u> copy of RE 5 certificate. The certified date should not be older than three (3) months.	

2. Claims Consultant/Administrator = 10 Points

Experience (5)

The Claims Consultant/Administrator must have at least three (3) years of experience as a claims consultant/administrator within the Insurance Industry

- 6 years and above = **5 Points**
- 3 – 5 years = **3 Points**

Compliance Requirement

CV indicating clearly number of years as a Claims Consultant/Administrator within the insurance industry. Where a Claims Consultant/Administrator has been with various organisations; the CV must clearly indicate the organisations and related period for each organization to enable the Corporation to calculate accurately the number of years. E.g.

✓ Name of Organisation

Period 01 January 2010 to 31 December 2015 (Total Years – 5yrs)

✓ Name of Organisation

Period 01 January 2015 to 30 June 2020 (Total Years – 4yrs 6months)

Qualification (5)

The Claims Consultant/Administrator must be in possession of any qualification

- Matric = **2 Points**
- Post Matric Certificate = **3 Points**
- Diploma or Degree Certificate (NQF Level 6 or more) = **5 Points**

Compliance Requirement

The bidder must attach a **certified** copy of recognized qualification. The certified date should not be older than three (3) months.

C. Professional indemnity insurance	20
The bidder is required to have a valid and current professional indemnity insurance. • R20 million to R49 million indemnity cover = 10 Points • Above R50m to R99m indemnity cover = 15 Points • Above R100m indemnity cover = 20 Points Compliance requirement: The bidder must attach a proof of professional indemnity insurance cover. OR Letter of intent in the bidder's letterhead and signed confirming that the bidder commits to take a cover in relation to the above accompanied by a quotation from the insurer.	
STEP ONE SUB TOTAL	70

NB: BIDDERS WILL BE REQUIRED TO SCORE A MINIMUM OF 50 POINTS IN ORDER TO QUALIFY FOR STEP 2.

STEP 2: PRESENTATIONS

A. PRESENTATION	30
1. INDUSTRY KNOWLEDGE AND EXPERIENCE (10) Bidder must outline and demonstrate an extensive knowledge and experience in the provision of insurance services Compliance requirement: Bidder to submit a Company profile detailing the following; ✓ Give information on company History (Types of products offered, Company Leadership, How long has the company been in operation, and any positive review by the industry, peers, clients etc.) = 4 points ✓ Ease of doing business (How does the company interact with clients e.g. On-line bill, Online pay claim reporting, 24/7 customer service, social media platforms, billing questions etc. = 3 points ✓ Give detail of disputes you had with current and previous clients and success rate in resolving your dispute (e.g., how many were successfully resolved within a year) = 3 points	
2. APPROACH AND METHODOLOGY (10) Bidder must outline and demonstrate an extensive knowledge and experience in the areas expertise indicated below. Compliance requirement: • Legal support = 5 points Detailed approach and methodology of support that will be provided to RTMC in respect of all claims. • Reporting = 5 points Detailed approach and methodology on how reporting would be carried out during the course of the contract and must include amongst others the following reports:	

➤ Reconciliation of all claims data. ➤ Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register. ➤ Performance Report recording any failures to achieve service levels, the cause of the failures and a summary of steps taken to resolve the failures and avoid them in the future.	
3. ONLINE INSURANCE SYSTEM (5) The bidder must provide for demonstration purposes an electronic insurance administration system fit for purpose to be utilised by the Corporation. Compliance requirement: The demonstration of the system must among other things, include the following: ➤ The functional capabilities of the system ➤ Provide a sample of a detailed policy schedule report generated from the system ➤ Multiuser access ability ➤ Outline and indicate whether the system has been implemented at other sites / clients	
4. TRANSITION PLAN (5) ➤ Transition plan which sets out how it will take over the services from the previous service providers and how it will set-up its service delivery capability to deliver the services without interruption of service = 3 points ➤ How you will assist with the handover to a new service provider at the expiration or earlier termination of the Agreement = 2 points	

<u>EVALUATION CRITERIA</u> The following measurers to be used; 5 – Excellent: Meets and exceeds the functionality requirements 4 - Very Good: Above average compliance to the requirements 3 – Good: Satisfactory and should be adequate for stated element 2 – Average: Compliance to the requirements 0 - Non-Compliant: Does not comply to the requirements NB: This area must be incorporated in the bid response as part of functionality. The service provider will be invited to present this in a form of Power point once they have qualified to this step.	
STEP TWO SUB TOTAL	30
OVERALL TOTAL FOR FUNCTIONALITY	100

Bidders will be required to make a presentation before the evaluation committee, however at least a minimum of **20 points** must be scored during the presentation.

NB: BIDDERS ARE EXPECTED TO SCORE MINIMUM OF SEVENTY (70) POINTS IN ORDER TO QUALIFY FOR STAGE 4.

1.5 STAGE 4 – PRICE AND B-BBEE (PREFERENCE POINTS EVALUATION)

Bidder/s who qualify for this stage will be evaluated using the PPPFA and the one scoring highest points will be awarded bid

CRITERIA	MAXIMUM POINTS
Price	80
B-BBEE Rating	20
Grand Total	100

SECTION: 4
ANNEXURE AND
STANDARD BIDDING
DOCUMENTS

See the attached SBD forms
(All SBD forms must be
signed)

BIDDING DOCUMENTS: GENERAL INFORMATION

1. The bidding forms are drawn up so that certain essential information is to be furnished in a specific manner. Any additional shall be furnished in the enclosed questionnaire(s) or in a separate annexure.
2. The bidding forms should not be retyped or redrafted but photocopies may be prepared and used. Additional offers may be made for any item, but only on a photocopy of the page in question. Additional offers made in any other manner may be disregarded.
3. Bidding forms not filled in using a computer and printer shall be completed in black ink.
4. Bidders shall check the numbers of the pages and satisfy themselves that none are missing or duplicated. No liability shall be accepted in regard to claims arising from the fact that pages are missing or duplicated.
5. The forms in respect of Preference Points Claim, if attached, shall be completed and submitted with the completed Bid.
6. Firm bid prices and delivery periods are preferred. Consequently, bidders shall clearly state whether prices and delivery periods will remain firm for the duration of the contract or not.
7. If non-firm prices are submitted, this fact should be clearly stated in the bidding documents.
8. Where items are specified in detail, the specifications from an integral part of the bidding document and bidders shall indicate in the space provided whether the items offered are to specification or not.
9. In respect of the paragraphs where the items offered are strictly to specification, bidders shall insert the words "as specified".

- 10.** In cases where the items are not to specification, the deviations from the specifications shall be indicated.
- 11.** The bid prices shall be given in the units shown.
- 12.** All prices shall be quoted in South African currency.