

REQUEST FOR QUOTATION (RFQ)

RFQ Description : Policy, Procedures and Framework Training and Templates overhaul

Award Period/ Duration : Twelve (12) months

Closing Date and Time : 31 August 2026 at 12:00PM

Briefing Session Date and Time : N/A

Site Inspection : N/A

SECTION 1: INSTRUCTIONS TO BIDDERS

1.1 Important dates

STEP No.	DESCRIPTION	DUE DATE
1	Release of RFQ	19 August 2026
2	Query window period	19 – 25 August 2026
3	Closing date for submission of RFQ	31 August 2026 at 12:00PM

1.2 General Terms

- The validity period of received quotations will be for a period of 90 days.
- Any information Sasria received from the other quoting entities will not be disclosed without prior written consent from the bidder concerned.
- Sasria will pay 30 days after the receipt of an undisputed invoice.
- Where Sasria will hold a compulsory briefing session, the entities which intend to submit quotes must ensure that they have signed an attendance register for such a briefing session.
- Responses must be returned strictly in accordance with this RFQ document.
- Scoring of received bids will be in line with the Preferential Procurement Policy Framework Act (PPPFA) and Sasria Procurement Policy.
- Quotations which are submitted after the closing date and / or time will not be accepted.

1.3 Clarification and Communication

- a) Bidders may only communicate on this RFQ in writing and for the purpose of additional information which is not clarified in the specifications. All enquiries should be addressed using the email address procurement@sasria.co.za and the RFQ number and description **must** be on the email subject line for ease of reference.
- b) Request for clarity or information on the RFQ may only be requested until **25 August 2026**. Any responses to queries or for clarity sought by a bidder will also be sent to all the other entities which have responded to the RFQ.
- c) Bidders may not contact any Sasria employee on this RFQ other than the Procurement office. Contact will only be allowed between the successful bidder and Sasria Business Unit representative/s after the approval to award this RFQ.
- d) Contact with business unit will also only be permissible in the case of pre-existing commercial relations which do not pertain to the subject of this RFQ.

1.4 Disclaimers

Sasria reserves the right to:

- a) Negotiate with all or some of the shortlisted bidders.
- b) Not accept the lowest priced quote or award the RFQ to a bidder other than the highest scoring bidder.
- c) Cancel this RFQ.
- d) Award parts of the RFQ to different bidders, or not to award the RFQ at all.
- e) Award the RFQ as a whole or in part.

1.5 Protection of Personal Information

1.5.1 Use of Personal Information

The Bidder voluntarily submits this RFQ/document containing personal information, for the purposes of Sasria's RFQ NO. **2026/21**

- a) Sasria is committed to protecting Bidder's privacy and recognises that it needs to comply with statutory requirements in collecting, processing and distributing of personal information.
- b) The Constitution of the Republic of South Africa provides that everyone has the right to privacy and the Protection of Personal Information Act 4 of 2013 ("POPIA") includes the right to protection against unlawful collection, retention, dissemination and use of personal information. In terms of section 18 of POPI, if personal information is collected Sasria, as responsible party, must take reasonably practical steps to ensure that the data subject is

made aware of the information being collected.

- c) In order to process RFQ No. **2026/21** and make an award to a successful Bidder, it is necessary for the Bidder to provide Sasria with personal information of the Bidder, which personal information includes, but is not necessarily limited to the Bidder's company's Director/Shareholder and registration details with relevant authorities such as SARS, CIPC, National Treasury, the required details of the Bidder's experience etc. This personal information is necessary for purposes of processing RFQ no. **2026/21** in the discharge of contractual and legislative obligations of Sasria.
- d) Sasria may be required, directly or indirectly, in terms of its regulatory obligations, to collect the information in order to report to the Minister representing its shareholder or other Government structures and for responsible record keeping, statistical and any other purpose.

1.5.2 Consent

- a) The Bidder (as data subject), by signing this document, hereby consents to the use of their personal information described herein and confirms that:
 - i. they have obtained all the necessary consent from their shareholders/directors or counterparts and/or employees, including the consent for Sasria to receive and process such personal information;
 - ii. information is supplied voluntarily, without undue influence from any party and not under any duress;
 - iii. the information which is supplied herewith is mandatory for the purposes of this RFQ No. **2026/21** and that without such information, Sasria will not be able to process RFQ no. **2026/21** and discharge legislative obligations;
- b) Failure to provide the information will result in the objectives of the RFQ no **2026/21** not being achieved, with the Bidder being disqualified also for RFQ no **2026/21**,
- c) The Bidder acknowledges that it is aware that it has the following rights with regard to such personal information which is hereby collected in accordance with this consent. The right to:
 - i. access the information at any reasonable time for purposes of rectification thereof;
 - ii. object to the processing of the information in which case its response to RFQ No : **2026/21** will terminate immediately on receipt of such objection;
 - iii. lodge a complaint to the Information Regulator.

1.6 Ethical Dealings

By submitting its bid, the bidder will be deemed to have confirmed that it is not involved in any form of unethical business practices, and hereby warrants that it shall adhere to all ethical standards required of it by virtue of the professional nature of its business.

1.7 CSD Registration

The bidder must be registered on CSD and be tax compliant.

1.8 Submission Format

- a) The quotation and all written material and attachments must be submitted in English. All price values must be stated in South African Rand values.
- b) Bidders are required to submit their Quotations electronically to Procurement Services Office at email address (procurement@sasria.co.za).
- c) The RFQ documents must be signed and completed by the authorized person acting on behalf of the bidding entity. The bottom of each page of the RFQ response documents must be signed or stamped with the bidder's stamp as proof that the bidder has read the RFQ documents and accepts the terms and conditions stipulated.

1.9 Evaluation Process

Proposals will be evaluated according to the following process:

Stage 1 – Governance

The evaluation during this stage is to ensure that all required documentation are received and duly completed and that all requisite requirements are complied with. During this stage all bidders that did not achieve the above requirements on documentation required, may be disqualified. The required documentation are as follow:

- CSD Report
- Valid BBBEE certificate or Valid Sworn Affidavit
- Returnable SBD Forms

Stage 2 – Functionality/ Technical Evaluation

With regard to Functionality, the following criteria (set out in more detail in section 2 of this RFQ document) and the associated weightings will be applicable:

ELEMENT	WEIGHT
APPROACH AND METHODOLOGY	30
PROJECT LEAD'S EXPERIENCE	25
BIDDER'S EXPERIENCE	45
TOTAL	100

Only bidders achieving a minimum score of 70% will be evaluated further in the next stage.

Stage 3 – Preference Point System

Bidders that achieved a minimum score of 70 points in stage 2 (technical criteria) will progress to this stage (stage 3) and will be evaluated on Price and Specific Goal(s) in accordance with the PPPFA Regulations. Specific Goals means specific goals as contemplated in section 2(1)(d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994.

Preference Point Allocation

Points will be calculated based on the preference points system as stipulated below:

CRITERIA	TOTAL POINTS ALLOCATED
Price	80
Specific Goal(s)	20
TOTAL	100 points

Criteria for Specific Goals

Below is the specific goal(s) allocated for this RFQ. Bidders are required to provide valid and sufficient proof as indicated in the table below to claim the preference points indicated.

Specific Goal to be measured	Points allocated out of a maximum 20.00 points	Proof required to allocate points
1. The tenderer is:	15.00	Sworn Affidavit

a) An Exempted Micro Enterprise (EME) or		
b) A Qualifying Small Enterprise (QSE) or	15.00	Valid B-BBEE certificate or Sworn Affidavit for QSE that are at least 51% black owned
c) A Generic enterprise	10.00	Valid B-BBEE certificate
d) A Generic enterprise (Prime Contractor) subcontracting at least 20% of the contract to either a EME or QSE.	15.00	1. Valid B-BBEE certificate and 2. A signed subcontracting agreement (between the Prime Contractor and Subcontracting parties) 3. Sworn Affidavit for EME or QSE that are at least 51% black owned
2. Additional points if the tenderer is at least 51% black Owned <i>(a Prime contractors B-BBEE certificate or Affidavit will be used in the case of subcontracting arrangements)</i>	5.00	Valid B-BBEE certificate or Sworn Affidavit

Please Note:

- Failure on the part of a tenderer to submit proof or documentation required in terms of this RFQ to claim points for specific goals with the quotation, will be interpreted to mean that preference points for specific goals are not claimed.
- Sasria reserves the right to require of a tenderer, either before a quotation is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the Sasria.
- Sasria reserves the right at its sole discretion, and at any time, to amend, deviate from, postpone, discontinue or terminate the transaction/procurement process without incurring any liability whatsoever to any other party.
- No commitment of any kind, contractual or otherwise shall exist unless and until a formal written agreement or purchase order has been executed by or on behalf of Sasria. Any notification of appointment or preferred service provider status by Sasria shall not give rise to any enforceable rights by the service provider. Sasria may cancel this RFQ any time prior to a formal written agreement or purchase order being executed by or on behalf of Sasria.
- Consortium or Joint Venture – to submit a valid consolidated B-BBEE certificate or Affidavit and a signed Consortium or Joint Venture agreement.
- Prime Contractor with Subcontractor(s)- Prime Contractor and Subcontractor(s) B-BBEE certificates or Affidavits are required and a signed subcontracting agreement
- Individual bidder – must submit a valid B-BBEE certificate or Valid Sworn Affidavit

SECTION 2: TECHNICAL REQUIREMENTS AND EVALUATION CRITERIA

2.1 Background Information

Sasria SOC Ltd is a public enterprise listed under schedule 3B of the Public Finance Management Act No 1 of 1999. Sasria SOC Ltd is a non-life insurance company that provides coverage for damage caused by special risks such as politically motivated malicious acts, riots, strikes, terrorism, and public disorders. As a result, we are required to comply with the relevant legislation in our space. We report to National Treasury guided by Public Finance Management Act, the Insurance Act, the Financial Sector Regulation Act, and the Financial Advisory and Intermediary Services Act, amongst others.

Scope of Work

The appointed Service Provider will be required to assist Sasria SOC Ltd with a comprehensive overhaul and standardization of all organizational templates used for policies, frameworks, and procedures. The objective is to ensure uniformity, consistency, and alignment across the organization.

The Company Secretariat Department will be responsible for facilitating this process and ensuring that the reviewed and approved templates are effectively communicated and implemented across all business units.

The appointed bidder will be required to review, overhaul, and standardise Sasria SOC Ltd.'s templates for policies, procedures, and frameworks. The aim is to ensure consistency in format, structure, and presentation across all governance documents, thereby promoting clarity, ease of use, and alignment with best practices.

The scope should include, but is not limited to:

- Assessing the current state of all existing templates.
- Recommending improvements aligned with industry standards and regulatory requirements.
- Developing a uniform set of templates for policies, procedures, and frameworks.
- Supporting the rollout and implementation of the standardised templates across the organisation.

- Development of a governance framework which outlines how policies are informed by strategy documents
- Sasria requires the development of a governance framework that outlines Policy, Procedures reviews, Framework Training, policy drafting and Templates overhaul and implementation going forward. This includes defining roles, responsibilities, review cycles, and escalation protocols. While elements of this may be referenced elsewhere in the document, it is essential to list this as a standalone deliverable to ensure clarity.
- The primary objective of the exercise is to develop a comprehensive framework that guides the organization's approach to policy development, rather than focusing solely on templates.
- This framework should define the standardized process for initiating, drafting, reviewing, and approving policies including the triggers for policy creation (e.g., regulatory requirements, strategic directives, or operational needs).
- The Framework should also outline how policies are informed by strategy documents, how they are prioritized, and how they fit into the broader governance landscape. Templates may be included as secondary outputs, but the emphasis must be on establishing a repeatable, principle-driven methodology for policy formulation and lifecycle management.
- Analyse all existing policy, procedure, and framework templates.
- Identify inconsistencies, duplication, outdated formats, and gaps.
- Guide on what should be in a policy, procedure and framework and structure of policy and procedure including other headings (miscellaneous matters relevant for policies).
- What should be the headings in each policy and under the headings what content should be captured under the headings. (Consider having different templates for policies which are regulated).
- Conduct Impact analysis of all Sasria policies.
- Identify minimum standards which policies, procedures and frameworks should adhere to.
- Identify proper definitions to eliminate jargon.
- Identify the alignment between regulations, legislation, policies, and procedures.
- Develop a policy development framework to ensure a uniform approach to policy development and a common understanding.

Benchmarking

- Benchmark against industry best practices, relevant legislation, and standards (e.g., King IV, PFMA, Companies Act, ISO standards where applicable).
- Include the review period as per best practice.

Template Design and Development

- Develop standardised templates for:
 - o Policies
 - o Procedures
 - o Frameworks
- Ensure templates include essential elements like:

- o Document title, number/reference, and version control
- o Purpose, scope, definitions, roles, and responsibilities
- o Approval process and record
- o Review cycles and document ownership
- o Alignment to corporate identity (branding)

Stakeholder Engagement

- Engage with key departments (e.g., Risk, Legal, Compliance, HR, Operations) to ensure templates are practical and user-friendly.

Finalisation and Handover

- Submit draft templates for approval by the Company Secretariat.
- Incorporate feedback and finalise templates.
- Deliver editable versions in approved formats (e.g., Word or equivalent).

Rollout Support

- Develop a brief guide/manual for using the templates.
- Provide a virtual training session or walkthrough (optional but recommended).

3. Expected outputs.

- Audit report on existing templates
- Benchmarking report (summary)
- Final standardised templates for:
 - o Policies
 - o Procedures
 - o Frameworks
- User guide for applying the templates.
- Presentation to Company Secretariat / EXCO (if applicable)

The following must be included in the proposal:

- Brief overview of the process to be followed.

3.1 Intervention objectives

Sasria SOC Ltd seeks to establish **uniform templates** for all organisational policies, procedures, and frameworks to ensure consistency, clarity, and alignment with corporate governance and regulatory requirements.

4. Technical Requirements Criteria

Criteria description		Weighting
4.1.1	APPROACH AND METHODOLOGY The bidder must demonstrate thorough understanding of the objectives and deliverables of this project. The bidder must provide a detailed proposal of the methodology/ approach for the development and execution of Frameworks, policies and procedures and governance frameworks. The methodology must cover, but not limited to the following: • Understanding of our requirements • Detailed and clear explanation of proposed training methodology • High level layout of the project phases including development of a governance framework, templates etc as per scope of work. The points will be allocated as follows: • The proposal fully meets expectation i.e., detailed proposal with clear objectives and outcomes of the intervention. (30 points) =100% • The proposal fairly meets expectation i.e., fair proposal in terms of interventions and objectives. (21 points) =70% • The proposal partially meets expectations, i.e., the proposal and methodology provide minimal information. (9 points) =30% • The proposal does not meet expectation (0 points) = 0%	30
4.1.2	PROJECT LEAD EXPERIENCE The bidder's proposed project lead must demonstrate that they have the necessary experience in Policy and Framework Training and Templates overhaul Bidder must submit a detailed CV of the Facilitator/Trainer/Project Lead The points will be allocated as follows: • 10 years' experience in facilitating and developing policies, and governance frameworks. (25 points) =100% • 6-9 years' experience in facilitating and developing policies,	25

	and governance frameworks and procedures (17.5 points) = 70% • 3-5 years' experience in facilitating and developing policies, and governance frameworks. (7.5 points) = 30% • 1-2 years' experience in facilitating and developing policies and governance frameworks. (0 points) = 0%	
4.1.3	BIDDER EXPERIENCE The bidder must demonstrate experience in delivering similar interventions, for similar government/financial or insurance industries, and development, facilitation/ training on both policy, procedures, and governance framework. The bidder must provide contactable references of similar work done in the past 10 (ten) years. The reference must be dated, in client's letterhead and signed where the bidder successfully managed a similar project. The points will be allocated as follows: • More than 5 references of similar work implemented in the past 10 years or more = 100% (45 points) • 5 references of similar work implemented in the past 10 years or more = 80% (36 points) • 3-4 references of similar work implemented in the past 10 years = 70% (31,5 points) • 1-2 references of similar work implemented in the past 10 years = 30% (13,5 points) • No references submitted = 0% (0 Points)	45

SECTION 3: PRICING SCHEDULE

1 Bidders are required to provide a detailed, comprehensive (all-inclusive) and fixed fee/price proposal i.e. all costs associated the bidder's proposal must be clearly specified and included in the Total Bid Price.

2 All prices must be VAT exclusive and must be quoted in South African Rand (ZAR).

3

Is the proposed bid price linked to the exchange rate?	Yes	No
<i>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</i>		

4

Payments will be linked to specified deliverables after such deliverables have been approved by Sasria.	Comply	Not Comply

5

Sasria reserves the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction 01 of 2024/2025: Cost Containment Measures , where relevant.	Comply	Not Comply
The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures.		
Substantiate / Comments		

6 Costing Schedule (Attach cost breakdown)

Item	Description	Number of days	Cost per day	Total Cost (VAT Excl.)
Training Delivery And template development	Group 1 with 20 participants	1 day		
Training Delivery And template development	Group 2 with 20 participants	1 day		
Total Bid Price (VAT Excl.)				

Price Declaration Form

Dear Sir,

Having read through and examined the Request for Quotation (RFQ) Document, RFQ no. **2026/21**, the Instructions, the Requirements and all other Annexures to the RFQ Document, we offer to provide procedures and framework training and templates overhaul as per specification at the following total amount:

R..... (Excluding VAT)

In words

R..... (Excluding VAT)

We confirm that this price covers all requirements as specified in this RFQ. We confirm that Sasria will incur no additional costs whatsoever over and above this amount in connection with the provision of these items.

We undertake to hold this quote open for acceptance for a period of 90 days from the date of submission of quotes. We further undertake that upon final acceptance of our quote; we will commence with the provision of services/ goods when required to do so by Sasria.

We understand that you are not bound to accept the lowest or any quote and that we must bear all costs which we have incurred in connection with preparing and submitting this quote.

We hereby undertake for the period during which this quote remains open for acceptance not to divulge to any persons, other than the persons to whom the bid is submitted, any information relating to the submission of this quote or the details therein except where such is necessary for the submission of this bid.

SIGNED

DATE

(Print name of signatory)

Designation

Declaration

I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the RFQ, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- The information furnished is true and correct;
- The preference points claimed are in accordance with the requirements as indicated in paragraph 1.9 of this RFQ
- In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.9, the contractor may be required to furnish documentary proof to the satisfaction of Sasria that the claims are correct.
 - If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - disqualify the person from the tendering process;
 - recover costs, losses or damages it has incurred or suffered as a result of that person's conduct.
 - cancel the contract and claim any damages which it has suffered as a result of having to make less favorable arrangements due to such cancellation.
 - recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
 - forward the matter for criminal prosecution, if deemed necessary

FOR AND ON BEHALF COMPANY
OF: NAME

Tel No

Fax No

Cell No
