

REQUEST FOR TENDER

FOR

**THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE
INSURANCE BROKING SERVICES TO THE SOUTH AFRICAN NATIONAL
BIODIVERSITY INSTITUTE (SANBI) FOR A PERIOD OF FIVE (5) YEARS**

**The South African National Biodiversity Institute (SANBI)
Private Bag X101
SILVERTON
0184
South Africa**

Tender No.SANBI: F406/2021

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1. INTRODUCTION AND BACKGROUND

The South African National Biodiversity Institute (SANBI) is a schedule 3A public entity organisation as defined by the Public Finance Management Act (Act 1 of 1999). SANBI derives its mandate from the National Environmental Management: Biodiversity Act (Act 10 of 2004).

SANBI requires a service provider to provide insurance broking services for a period of five years.

SANBI has **three (3)** main operational centres, namely at the SANBI Head Office situated in the Pretoria National Botanical Garden (PNBG) in Pretoria, the National Zoological Garden (NZG) in Pretoria and the Kirstenbosch National Botanical Garden (KNBG) in Cape Town. SANBI also has other operational centres within the provinces indicated below:

- **Eastern Cape** (Kwelera National Botanical Garden and the Biodiversity Monitoring Assessment Office in East London)
- **Free State** (Free State National Botanical Garden in Bloemfontein)
- **Gauteng** (Walter Sisulu National Botanical Garden in Roodepoort)
- **KwaZulu-Natal** (KwaZulu-Natal National Botanical Garden in Pietermaritzburg, the KwaZulu-Natal Herbarium and the Biodiversity Monitoring Assessment Office in Durban)
- **Limpopo** (Thohoyandou Botanical Garden in Thohoyandou and the Mokopane Biodiversity Conservation Centre in Mokopane)
- **Mpumalanga** (Lowveld National Botanical Garden in Mbombela)
- **Northern Cape** (Hantam National Botanical Garden in Nieuwoudtville)
- **Western Cape** (Harold Porter National Botanical Garden in Betty's Bay and the Karoo Desert National Botanical Garden in Worcester)

2. INVITATION TO TENDER

Tenders are hereby invited to provide SANBI with insurance broking services for a period of five (5) years. Bidders are required to demonstrate similar work performed within the public sector and with clients of similar size.

The tender process will be co-ordinated by SANBI's Supply Chain Management (SCM) department, contactable at the following address:

Deputy Director: Supply Chain Management
The South African National Biodiversity Institute (SANBI)
Private Bag X101
Silverton
0184

The tender closes on 19 November 2021

3. COMPULSORY ONLINE BRIEFING SESSION

A virtual compulsory briefing session will take place on 05 November 2021 from 09:00 until 10:30 on Microsoft Teams. One representative per service provider will be allowed to attend the briefing session. Bidders who wish to attend are advised to make a booking by providing their e-mail addresses to the following e-mail: Sanbi.tenders@sanbi.org.za with the tender no (SANBI:F406/2021) as the subject line by 16:00 on 04 November 2021.

Bidders may direct technical and bidding procedure enquiries to the email addresses below. All responses will be communicated via this tender's advertisement webpage on the SANBI website at: www.sanbi.org.

- For bidding procedure enquires: sanbi.tenders@sanbi.org.za
- For technical enquires: a.smith@sanbi.org.za

SANBI will not respond to any questions or requests for clarification if received after 08 November 2021

All questions submitted by prospective bidders and responses to these questions by SANBI will be forwarded to all bidders who attended the briefing session.

4. SCOPE OF WORK

SANBI requires the following insurance services:

a. Performance specifications

The bidders should be able to provide the following general insurance actions in terms of placement, maintenance and administration of the insurance portfolio:

- Place relevant insurance cover based upon SANBI operations and risks;
- Claim administration and maintenance;
- Day-to-day correspondence and queries;
- Monitor premium payments and refunds in accordance with accounts and statements;
- Negotiate settlement of claims on behalf of SANBI;
- Keep proper record of the claims;
- Keep SANBI up to date with latest amendments to the legislation on insurance in writing and through training where necessary.

b. Technical requirements

i. Assets

- To cover all tangible property of every description belonging to SANBI or in which SANBI has any proprietary or pecuniary interest against loss or damage;
- Electronic and computer equipment: to cover all electronic business equipment including computers, laptops, licensed software, leased printers, etc.;
- Stock: to cover on goods forming part of SANBI's business activity;
- Building cover: SASRIA, property terrorism and sabotage, fire, explosion, earthquake, power surges, alterations and additions etc.;
- Cash: to cover cash losses due to theft, fraud etc.;
- Travel: to cover local and international travel.

ii. Employees and visitors' liability

- Public Liability: to protect SANBI against claims involving illness, injury, death, damages to third party property;
- To protect the claims made against SANBI's Board members and Executive staff members. The policy must cover board members and executive staff members against damages, judgements, settlements and defence costs for which they may be held personally liable.

iii. Business interruption

- Cover for financial loss suffered following interruptions of SANBI's business due to whatever cause.

iv Annual renewals

- Review existing cover, limits and sums insured;
- Review uninsured risks and exposure;
- Perform re-broking and market exercise to obtain renewal terms;
- Convene pre-renewal meeting to discuss renewal terms and possible alternatives;
- Renewal follow-up on alternative quotations;
- Presentation of renewal terms and recommended options;
- Confirmation of placement and 100% cover
- Compile and provide detailed insurance manual as well as full summary on cover, limits, conditions and exclusions;
- Check and provide issued policy as well as legal confirmation of statutory compliance;
- Compilation of claims procedural manual;
- Facilitate ad hoc adjustments and endorsements on sums insured and declarations to insurers/re-insures;
- Claims administration;
- Monitor premium payments and refunds in accordance with accounts and statement.

The scope above covers portfolios identified at this stage and does not necessarily limit the scope to the items mentioned. It is expected that the service provider will advise SANBI of any other relevant cover required in the light of its operations.

5. MANDATORY REQUIREMENTS / DOCUMENTS

Tenders must include the following documentation (**Failure to submit the required documentation WILL lead to disqualification**):

- Duly completed and signed **SBD forms**.
- Compulsory briefing sessions certificate of attendance.
- A copy of the Company Central Supplier Database (CSD) registration report.
- **Fee/cost structure to be submitted with the "ORIGINAL" tender document only.**
- UIF compliance demonstrated by submission of one of the following:
 - A valid copy of the UIF Letter of Compliance issued by the Department of Employment and Labour, or
 - Labour uFiling Employer Statement of Account indicating UIF payments or accruals not older than 12 months, or
 - SARS eFiling Employer Statement of Account indicating UIF payments or accruals not older than 12 months, or
 - Valid proof of exemption for UIF

- A certified copy of Liability Insurance Cover for the company and the total cover available per claim to the value of R1 million
- Letter of Good Standing from the office of the Compensation Commissioner as required by the Compensation for Occupational Injuries and Diseases Act (COIDA). The letter should be issued by the Department of Labour
- A copy of the latest Audited Financial Statements together with a letter from the auditors confirming that the bidder is solvent..
- A valid original or certified copy of a B-BBEE Status Level Certificate or sworn affidavit must be submitted. The pre-qualification criteria for preferential procurement: Section 4(1) (a) for this tender will be having a stipulated minimum Broad-based Black Economic Empowerment (B-BBEE) Status Level contributor, level 1.

6. ADDITIONAL INFORMATION REQUIRED

The following information is required to ensure that an evaluation can be conducted:

- Company history and ownership.
- List of major clients with contact persons information and details.
- List of previous similar contracts awarded and supported in the last three (3) years.
- Availability of specialised technical resources necessary to render the services required in terms of the scope of work.
- Overall capacity of the firm.
- Details of experience and capacity of resources to fulfil the requirements of SANBI.
- Organisation's commitment to equity principles including details on the equity break-down in the ownership.

7. PRICING

All proposals are to include VAT and SANBI will assume that all pricing received is VAT inclusive and in South African Rand (ZAR).

- Foreign exchange rates used must be indicated (if applicable).
- Pricing template to be completed (Annexure B) (Please note: this Annexure must only be included in the document marked 'Original' (See section 14)).
- All pricing will be final and binding.
- Failure to comply with the pricing table will lead to immediate disqualification.

8. COMMUNICATION AND STATEMENT OF GOOD FAITH

All information provided by SANBI in this ToR is offered in good faith. Individual items are subject to change at any time. SANBI makes no certification that any item is without error.

Formal communications may include, but are not limited to:

- Recommendations to SANBI in writing, regarding any discrepancies, errors or omissions which may exist within this ToR;
- Recommendations to SANBI in writing, regarding any enhancements which might be in SANBI's best interests;
- Questions and requests for clarification. SANBI will make a good faith effort to provide a written response to each question or request for clarification that requires addenda within five calendar days. All questions and answers will be shared with all bidders registered at the compulsory briefing session.

9. EVALUATION

In accordance with the National Treasury Instruction Note on the Amended Guidelines in Respect of Bids that Include Functionality as a Criterion for Evaluation (issued 3 September 2010), this bid will be evaluated in two stages:

The first stage will evaluate functionality according to the criteria listed in the table below:

No	CRITERIA	Weighting
1.	<u>Capability</u> The service provider should demonstrate the ability to carry out the work required. The proposal should include the following: • How the service provider will assist SANBI in ensuring that insurance cover is adequate and SANBI's requirements are met. (10) • Demonstration of an understanding and knowledge of the insurance cover required based on SANBI operations. (15) • Proposal of suitable insurance packages in the market as per SANBI's operations. (10) • Value added services that will be provided to SANBI. (5)	40
2.	<u>Capacity</u> The service provider should demonstrate the ability to carry out the work required. Adequate resources should be assigned for the timeous completion of the project. • Company Profile. The bidder(s) must include a company profile detailing: Company registration documents (Proof of ownership/shareholding certificate). Also provide an organogram of the team allocated to the project. (5) • List of all available resources to be assigned. The CVs should include details of: ○ Appropriate previous experience of a minimum of three years. Experience in the Public Sector. (10) ○ Expertise in the form of qualifications and other relevant specialized expertise. These should include: number of years of experience of individual team members in Customer service and clients that the team members have serviced. (10) ○ Experience in analysing and providing insurance products applicable to SANBI operations. Appropriate supporting documentation should be included. (10)	35
3.	<u>Past Experience</u> This refers to the previous experience of the service provider to provide services of a similar nature. The service provider is required to provide the following: • Scope of work and scale of current and/or past projects undertaken in providing similar services within the Public Sector. This should clearly demonstrate the bidder's short term and long term insurance broking experience (15) • Written references of traceable current and/or previous organizations to which similar services have been provided in the last three years. Minimum of five (5) should be provided (10)	25

	Total Points	100
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Sufficient information must be provided to allow the Bid Evaluation Committee to score bids against all these criteria.

Bids that fail to score a minimum of 70 out of a possible 100 points for functionality will not be eligible for further consideration.

The second stage will evaluate the price and preferential points of those bids that meet the minimum threshold for functionality. In accordance with the Preferential Procurement Policy Framework Act (No. 5 of 2000), the 80/20-point system will be applied in evaluating proposals that qualify for further consideration, where price constitutes 80 points and B-BBEE Status Level Certificate scores constitutes 20 points.

10. REFERENCES

Kindly provide a table of reference as requested in Annexure A.

11. PERIOD OF CONTRACT

This contract will be for a period of five (5) years renewable annually based on performance and internal needs assessment of SANBI.

12. PREPARATION AND HANDLING OF BIDS

The South African National Biodiversity Institute will not be held responsible for any expenditure incurred by supplier or companies in the preparation and handling of the bids and bid documents.

13. PRICE TO BE PROVIDED (Only in the envelope marked original)

The pricing is to be provided as per the table in Annexure B.

14. SUBMISSIONS

All tender documents submitted shall remain valid for a period of four (4) calendar months (120 days).

In respect of Bids that include functionality as a criterion for evaluation (Issued 3 September 2010), the two-envelope system will be used for this bid.

Service providers are to submit (1) printed document with pricing included in an envelope, marked 'ORIGINAL', and in a separate envelope provide a copy of the document without pricing as a PDF file on a memory stick.

NB: Financial or pricing details (Annexure B) should ONLY be included in the printed document marked 'ORIGINAL', and not in the PDF file of the document on the memory stick.

NB: Failure to submit one printed document with pricing in one envelope, and a document without pricing on a memory stick will lead to your bid being disqualified.

Closing date and time for submissions: 19 November 2021 at 11:00.

All documents must be neatly bound, clearly labelled and include a Table of Contents

Tenders shall be submitted in the following manner:

Addressed to: The Deputy Director: Supply Chain Management

Drop off in the Tender Box located in the Biodiversity Building at the Pretoria National Botanical Garden, 2 Cussonia Avenue, Brummeria, Pretoria by **11:00 on 19 November 2021** Normal office hours are: 08:00–16:00 .

Bidders must ensure that persons delivering their bids understand where and how delivery is to take place.

NB. E-mailed and faxed submissions will not be accepted. Late submissions will not be considered.

ANNEXURE A: REFERENCES

Kindly provide a table of reference with the information below.

Name of company	Date services performed	Contract value	Contact person	Email address	Contact number

**ANNEXURE B:
PRICING**

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Annual fee						
VAT						
TOTAL						