



INVITATION TO BID

PROVISION OF INSURANCE BROKING SERVICES

CHE/CS/02/11/2016

CLOSING DATE: 15 DECEMBER 2016

CLOSING TIME: 11:00 AM

BID DOCUMENT INDEX PAGE

Bidders are to ensure that they have received all pages of this document, which consist of the following sub-documents:

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1. Part 1-Invitation to Bid

You are hereby invited to bid for requirements of CHE

Description: **Appointment of a service provider to provide insurance broking services to the Council on Higher Education (CHE) for a period of 5 (Five) years.**

Bid Number: CHE/CS/02/11/2016 Closing Date: 15 December 2016

Closing time: 11:00 am

Briefing session: 01/12/2016 at 10:00 am

Validity: Offer to be valid for **120** days from the closing date of the bid

The successful bidder will be required to fill in and sign a written Contract Form

Bid documents should be deposited in the tender box situated at:
1 Quintin Brand Street
Persequor Technopark
Brummeria
Reception area

No faxes or emailed bids will be accepted

Bidders should ensure that bids are delivered timeously before the closing date and time to the correct address. If the bid is late, it will not be accepted for consideration.

- Bids can be delivered between 08:00 and 16h30, Mondays to Fridays prior to the closing date and between 08:00 and 11:00am on the closing date.
- All bids must be submitted on the official forms (not to be re-typed).
- This bid is subject to the General Conditions of Contract (GCC) and, if applicable, any other Special Conditions of Contract.
- Bids submitted that do not comply with the following may not be considered for evaluation:
 - A bid that is not in the format prescribed
 - A bid without some or all of the required documents
 - Pricing schedules not in the required format
 - Bids without the required number of copies
 - No bidder will be allowed to bid if they did not attend the compulsory briefing session.

Any queries regarding bidding procedures and technical information may be directed to:

Name: Maeta Thobane
Tel: 012 349 3903
Email: thobane.m@che.ac.za

All bidders must furnish the following particulars and include it in their submission:

- Proof of registration of an entity, CK1 and/or CK 2 and/or CM23;
 - Proof of registration as a financial service provider;
 - Declaration and proof that pension or provident fund contribution are not in arrears;
 - Original or certified copy of B-BBEE certificate or a sworn affidavit;
 - In the event the company is bidding as a Joint Venture, all members of the JV must submit all required documentation.
-

NB: CHE will conduct screening on mandatory documents to check whether bidders meet compliance requirements. Non-submission of these documents may result in the bidder being disqualified from evaluation.

Name of bidder:.....

Entity name:.....

Vat registration number:.....

FSP Number:.....

Tax Clearance submitted: YES / NO

Postal address:.....

Street address:.....

Telephone number: Code.....Number:.....

Cellular number:.....

Facsimile Number: Code.....Number:.....

E-Mail:.....

Contact details of responsible person who will act on behalf of the entity /consortium / joint venture for this

Name and Surname:.....

Telephone number: Code.....Number:.....

Cellular number:.....

Facsimile Number: Code.....Number:.....

E-Mail:.....

Contact details of alternative responsible person who will act on behalf of the person above should he/she not be available

Name and Surname:.....

Telephone number: Code.....Number:.....

Cellular number:.....

Facsimile Number: Code.....Number:.....

E-Mail:.....

TAX CLEARANCE CERTIFICATE REQUIREMENTS

It is a condition of bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

1. In order to meet this requirement bidders are required to complete in full the attached form TCC 001 "Application for a Tax Clearance Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders / individuals who wish to submit bids.
2. SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval.
3. The original Tax Clearance Certificate must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate will not be acceptable.
4. In bids where Consortia / Joint Ventures / Sub-contractors are involved, each party must submit a separate Tax Clearance Certificate.
5. Copies of the TCC 001 "Application for a Tax Clearance Certificate" form are available from any SARS branch office nationally or on the website www.sars.gov.za.
6. Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website www.sars.gov.za.

PRICING SCHEDULE

NAME OF BIDDER:	
BID NO: CHE/CS/02/11/2016	
CLOSING TIME 11:00 am	CLOSING DATE: 15 December 2016

OFFER TO BE VALID FOR **120** DAYS FROM THE CLOSING DATE OF BID.

ITEM
DESCRIPTION BID PRICE IN RSA CURRENCY (**INCLUSIVE OF VALUE ADDED TAX**)

- The accompanying information must be used for the formulation of proposals.
- Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

Price in words:.....

.....

- Are the rates quoted firm for the full period of contract? YES /NO

- If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

.....

- Bidders are required to propose a basis for the computation of the broker remuneration/commission. Note that failure to propose the fee will render the entire bid as non-responsive and will result in the bidder scoring zero out of 80 points achievable on the price criteria.

NOTES REGARDING PRICING

*1. The annual fee **MUST** be all inclusive. This means, all direct and indirect related cost must be included in the annual fee. No additional cost will be considered post award of the bid.*

Any enquiries regarding bidding procedures may be directed to the:

SUPPLY CHAIN MANAGEMENT
Maeta Thobane
thobane.m@che.ac.za
Tel: 012 349 3903

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:.....

2.3 Position occupied in the Company (director, trustee, shareholder², member):
.....

2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

2"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? YES / NO

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:.....

.....

Name of state institution at which you or the person connected to the bidder is employed:

Position occupied in the state institution:.....

Any other particulars:

.....

.....

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? YES / NO

2.7.2.1 If yes, did you attach proof of such authority to the bid document? YES / NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....

.....

.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? YES / NO

2.8.1 If so, furnish particulars:

.....

.....

.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with YES / NO

the evaluation and or adjudication of this bid?

2.9.1 If so, furnish particulars.

.....
.....
.....

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

YES / NO

2.10.1 If so, furnish particulars.

.....
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?

YES / NO

2.11.1 If so, furnish particulars:

.....
.....
.....

3. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number / Personnel Number

4. DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 AND 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE
PREFERENTIAL PROCUREMENT REGULATIONS 2011**

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R1 000 000 (all applicable taxes included).

1.2 The value of this bid is estimated to exceed R1 000 000 (all applicable taxes included) and therefore the 90/10 system shall be applicable.

1.3 Preference points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contribution.

1.3.1 The maximum points for this bid are allocated as follows:

	POINTS
1.3.1.1 PRICE
1.3.1.2 B-BBEE STATUS LEVEL OF CONTRIBUTION
Total points for Price and B-BBEE must not exceed	100

1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

- 2.1 **“all applicable taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 2.2 **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad -Based Black Economic Empowerment Act;
- 2.3 **“B-BBEE status level of contributor”** means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 2.4 **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 2.5 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.6 **“comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.7 **“consortium or joint venture”** means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;
- 2.8 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.9 **“EME”** means any enterprise with an annual total revenue of R5 million or less.
- 2.10 **“Firm price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.11 **“functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 2.12 **“non-firm prices”** means all prices other than “firm” prices;
- 2.13 **“person”** includes a juristic person;
- 2.14 **“rand value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.15 **“sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 2.16 **“total revenue”** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based

Black Economic Empowerment Act and promulgated in the *Government Gazette* on 9 February 2007;

2.17 “**trust**” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and

2.18 “**trustee**” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

3. ADJUDICATION USING A POINT SYSTEM

3.1 The bidder obtaining the highest number of total points will be awarded the contract.

3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;.

3.3 Points scored must be rounded off to the nearest 2 decimal places.

3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.

3.5 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.

3.6 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

4. POINTS AWARDED FOR PRICE

4.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for comparative price of bid under consideration

P_t = Comparative price of bid under consideration

P_{min} = Comparative price of lowest acceptable bid

5. Points awarded for B-BBEE Status Level of Contribution

5.1 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	8	16
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

- 5.2 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.
- 5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- 5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.
- 5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub- contractor is an EME that has the capability and ability to execute the sub-contract.
- 5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

6. BID DECLARATION

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

7.1 B-BBEE Status Level of Contribution =
(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

8 SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted? YES / NO

8.1.1 If yes, indicate:

- (i) what percentage of the contract will be subcontracted?%
- (ii) the name of the sub-contractor?
- (iii) the B-BBEE status level of the sub-contractor?
- (iv) whether the sub-contractor is an EME? YES / NO

9 DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm
:

9.2 VAT registration number :

9.3 Company registration number
.....
:

9.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One person business/sole propriety
- Close corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....
.....
.....

9.6 COMPANY CLASSIFICATION

- Manufacturer
- Supplier
- Professional service provider
- Other service providers, e.g. transporter, etc.
[TICK APPLICABLE BOX]

9.7 Total number of years the company/firm has been in business?
.....

9.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct;
- (ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.
- (iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, 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
- (e) forward the matter for criminal prosecution

(f) CHE reserves the right to award business to more than 1(one) bidder.

WITNESSES:

1.

..... SIGNATURE(S) OF BIDDER(S)

2.

DATE:.....

ADDRESS:.....

.....

.....

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid .
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES	
1
	.
2
	.

**DECLARATION OF BIDDER'S PAST
SUPPLY CHAIN MANAGEMENT PRACTICES**

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		

4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

CERTIFICATION

**I, THE UNDERSIGNED (FULL NAME).....
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS
TRUE AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE
TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.**

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *per se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

2. Part 2- Condition of Bid

No	Conditions	Confirmation			
		Yes	No	Noted	If no indicate deviation
1. GUIDELINE ON COMPLETION					
1.1	Bidders must indicate compliance or non-compliance on a paragraph by paragraph basis. Indicate compliance with the relevant bid requirements by marking the YES box and non-compliance by marking NO box. If the contents of the paragraph only need to be noted. Please mark the NOTED box. The bidders must clearly state if a deviation from these requirements are offered and the reason thereof. If an explanatory note is provided, the paragraph reference must be attached as an appendix to the bid submission. Bids not completed in the manner may be considered incomplete and rejected. Should bidders fail to indicate agreement/compliance or otherwise, the CHE will assume that the bidder is not in compliance or agreement with the statement(s) as specified in this bid document				
1.2	Proper bids for the services specified must be submitted.				
2. GENERAL CONDITION OF CONTRACT					
2.1	The General Conditions of Contract must be accepted.				
3. ADDITIONAL INFORMATION REQUIREMENTS					
3.1	During evaluation of bids, additional information may be requested in writing from bidders. Replies to such must be submitted, within 5 (five) working days or as otherwise indicated. Failure to comply, may lead to your bid being disregarded.				
4. VENDOR INFORMATION					
4.1	All bidders will be required to complete a vendor information form detailing the organization's complete profile.				
5. QUESTIONNAIRE : BROAD BASED BLACK ECONOMIC EMPOWERMENT					
5.1	All bidders will be required to complete a Broad Based Black Economic Empowerment form detailing the organisation's complete profile(Not applicable in case of individuals bidding)				
No	Conditions	Confirmation			
		Yes	No	Noted	If no indicate deviation

6. CONFIDENTIALITY					
6.1	The bid and all information in connection therewith shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid.				
6.2	All bidders are bound by a confidentially agreement preventing the authorized disclosure of any information regarding CHE or of its activities to any other organization or individual. The bidders may not disclose any information, documentation or products to other clients without written approval of the CHE.				
7. INTELLECTUAL PROPERTY, INVENTIONS AND COPYRIGHT					
7.1	Copyright of all documentation relating to this assignment belongs to CHE. The successful bidder may not disclose any information, documentation or products to other client without the written approval of CHE.				
7.2	In the event that the Company would like to use any information or data generated in terms of the services, the prior written permission must be obtained from CHE.				
7.3	CHE shall own all material produced by the company during the course of, or as part of the services.				
7.4	This clause 7 shall survive termination of this agreement.				
8. PAYMENTS					
8.1	CHE will pay the Company the fee as set out in the final contract. No additional amounts will be payable by CHE to the contractor.				
8.2	The contractor shall from time to time during the duration of the contract, invoice CHE for the services rendered. No payment will be made to the contractor unless an invoice has been submitted to CHE.				
8.3	Payment shall be made into the bidder's bank account within 30 days after receipt of an acceptable, valid invoice. (Banking details must be submitted as soon as this bid is awarded)				
8.4	The contractor shall be responsible for accounting to the appropriate authorities for its Income Tax, VAT or other moneys required to be paid in terms of applicable laws.				
No	Conditions	Confirmation			
		Yes	No	Noted	If no indicate deviation
9. NON COMPLIANCE WITH DELIVERY ITEMS					

9.1	As soon as it becomes known to the contractor that he/she will not be able to deliver the goods/services within the delivery period/or against the quoted price and/or as specified, the CHE must be given immediate written notice to this effect. The CHE reserves the right to implement remedies as provided for in the GCC				
10. WARRANTS					
10.1	The Company warrants that: It is able to conclude the Agreement to the satisfaction of CHE				
10.2	Although the contractor will be entitled to provide services to persons other than CHE, the contractor shall not without the prior written consent of CHE, be involved in any manner whatsoever, directly or indirectly, in any business or venture which competes or conflicts with the obligations of the contractor to provide the services.				
11. PARTIES NOT AFFECTED BY WAIVER OR BREACHES					
11.1	The waiver (whether expresser implied) by any party of any breach of the terms or conditions of this agreement by the other party shall not prejudice any remedy of the waiving party in respect of any continuing or other breach of the terms and conditions hereof.				
11.2	No favour, delay, relaxation or indulgence on the part of any party in exercising any power or right conferred on such party in terms of this Agreement shall operate as a waiver of such power or right under this agreement				
12. RETENTION					
11.1	On termination of this agreement, the contractor shall on demand hand over all documentation, information, software, etc., without the right of retention, to the CHE				
11.2	No agreement to amend or vary a contract or order or the conditions, stipulations or provisions thereof shall be valid of any force and effect unless such agreement to amend or vary is entered into in writing and signed by the contracting parties. Any waiver of the requirement that the agreement to amend or vary shall be in writing.				
No	Conditions	Confirmation			
		Yes	No	Noted	If no indicate deviation
13. SUBMITTING BIDS					

13.1	An original plus four (4) copies of the bid, i.e. five (5) documents in total should be handed in/delivered to:				
13.2	Supply Chain Officer Council on Higher Education (CHE) 1 Quintin Brand Street, Persequor Technopark Brummeria, 0002				
NB: Bidders are to indicate on the cover of each document whether it is the original or a copy.					
13.3	Bids should be in a sealed envelope, marked with: <ul style="list-style-type: none"> • Bid number (CHE/CS/02/11/2016) • Closing Date and time (15/12/2016 at 11:00 am) • The name and address of the tenderer. 				
14. LATE BIDS					
14.1	Late submissions will not be accepted. A submission will be considered late if it arrived only one second after 11:00 am or anytime thereafter. The Bid box shall be locked at exactly 11:00 am and Bid arriving late will not be accepted under any circumstances. Bidders are therefore strongly advised to ensure that bids be dispatched allowing enough time for any unforeseen events that may delay the delivery of the bid.				
15. BRIEFING SESSION AND CLARIFICATIONS					
15.1	A compulsory briefing session will be on the 02/12/2016 at 10:00 am at the CHE Offices.				
15.1.1	Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (letter, facsimile or email) The bid number should be mentioned in all correspondence				
16. DETAILS OF PROPOSAL DOCUMENTS					
16.1	Part 1 : Invitation to Bid Bidders must complete and submit the "Invitation to Bid" document.				
16.2	Part 2 : Compliance to Special Conditions of Bid and Noting of Evaluation Process and Criteria Bidders must complete all SBD documents. Indicating compliance/non-compliance or noted. In case of non-compliance details and referencing to the specific paragraph is required.				
16.3	Part 3 : SARS and Tax Clearance Certificate				
No	Conditions	Confirmation			

		Yes	No	Noted	If no indicate deviation
	3.1 An original SARS Tax Clearance Certificate must accompany the proposal. In the case of a consortium/ joint venture, or where sub-contractors are utilized, an original SARS Tax Clearance Certificate for each consortium/ joint venture member and/or sub-contractor (individual) must be submitted. In case of non-availability of Tax Clearance Certificate for bidders who will be bidding as individuals, letter from SARS certifying that the individual's tax matters are in order should be attached.				
	3.2 B-BBEE Certificate(s).NB: In case of non-availability of B-BBEE Certificate for bidders who will be bidding as individuals, a sworn affidavit attached.				
16.4	Part 4 : Declaration of interest Bidders must complete and submit the Declaration of Interest				
16.5	Part 5: Standard Bid Documentation Bidders must complete and submit all required documentation.				
16.6	Part 6:Technical Approach Bidders must indicate/demonstrate their understanding of this assignment and how they will approach it				
16.7	Part 7: Experience in this field Bidders should provide at least the following information: <ul style="list-style-type: none"> • Details of contracts for similar/related work within the last 3 years. • Contract details of a minimum of 3 organisations for which work was done 				
16.8	Part 8: Term details				
16.8.1	In this section bidders must provide details of the team named in previous part.				
16.8.2	They should provide a summary chart containing all the people to be used.				
16.8.3	For each team member there must be: <ul style="list-style-type: none"> • A brief capability statement indicating clearly why they are suitable to fill their position • A complete curriculum vitae. A format is provided as a guideline for the compilation of the CV's 				
16.9	Part 9: Pricing Schedule				
No	Conditions	Confirmation			

		Yes	No	Noted	If no indicate deviation
16.9.1	All costs related to this assignment are to be allowed for in the pricing schedule and formats prescribed.				
16.9.2	A pricing schedule with one of the specified elements omitted from the costing may be considered non responsive.				
17. PRESENTATION					
17.1	The CHE reserves the right to invite bidders for presentation before the award of the bid, as part of evaluation process.				
18. NEGOTIATIONS					
18.1	The CHE has the right to enter into negotiation with a prospective contractor regarding any terms and conditions, including price(s), of a proposed contract.				
18.2	The CHE shall not be obliged to accept the lowest of any quotation, offer or proposal.				
18.3	Despite preferential procurement regulations 3(4), 4(4), 5(4), 6(4) and 8(8) that state that only the proposal with the highest number of points may be selected, a contract may, on reasonable and justifiable grounds, be awarded to a proponent that did not score the highest number of points.				
18.4	All Bidders will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of CHE or his written authorized delegate				
18.5	Documents submitted by bidders will not be returned.				
19. DOMICILIUM					
19.1	The parties hereto choose domicilia citandi et executandi for all purposes of and in connection with the final contracts as follows:				
No	Conditions	Confirmation			

		Yes	No	Noted	<i>If no indicate deviation</i>
19.2	Council on Higher Education 1 Quintin Brand Street Persequor Technopark Brummeria 0002				
19.3	The Service Provider:				

3. Part 3- Terms of Reference

Appointment of a service provider to provide insurance broking services to the Council on Higher Education (CHE) for a period of 5 (Five) years, on the 80/20 PPPFA, as amended.

A. TERMS OF REFERENCE

1. OBJECTIVES

1.1 The broad objectives of this bid include:

1.1.1 To provide prospective service providers with adequate information to understand and respond to the CHE's requirements for the provision of insurance broking services to the CHE.

1.1.2 To ensure uniformity in the responses received from each prospective service provider.

1.1.3 To provide a structured framework for the evaluation of proposals.

2. PURPOSE OF THE REQUEST FOR THE BID

2.1 The purpose of the Request for the Bid is to appoint a contractor to provide insurance broking services to the CHE.

2.2 The appointment will be for a period of five (5) years commencing on the 1st of April 2017.

3. SCOPE OF WORK

3.1 The scope of services required from the contractor shall include:

3.1.1 Administration in order to obtain required insurance cover;

3.1.2 Claims administration, including claims logging and tracking.

3.1.3 Facilitating the relationship with the appointed insurers and underwriters;

3.1.4 Quarterly and annual reporting;

3.1.5 Advice to the CHE on its short-term insurance portfolio;

3.1.6 Transition plan to take over the insurance broking services the bid be awarded to a new service provider.

3.2 The contractor should be able to review and advise on the short-term insurance requirements of the CHE, have the necessary expertise and infrastructure to efficiently respond to insurance enquiries and needs of the entity. The appointed

broker will be required to provide guidance on the insurance portfolio of the CHE. Proposals should set out how their services will assist the CHE in this area.

Annexure 1 below is a detailed breakdown of the scope of services.

3.3 Reporting

3.3.1 The following reporting must be provided on a quarterly basis:

3.3.1.1 Reconciliation of all claims data.

3.3.1.2 Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.

3.3.1.3 Performance Report recording any failures to achieve service levels, the causes of the failures and a summary of steps taken to resolve the failures and avoid them in the future.

3.3.1.4 On-going evaluation of uninsured risks and possible options for addressing them.

3.3.2 The following reporting must be provided on an annual basis:

3.3.2.1 Updating the CHE 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 CHE's renewal strategy and insurance portfolio;

3.3.2.2 Updating the CHE on legal developments within the short-term insurance industry and informing the CHE on insurance product developments, and the risk mitigation developments in the South African market; and

3.3.2.3 Reviewing the CHE's short-term insurance portfolio with Risk Unit and the Chief Financial Officer in a formalised pre-set meeting.

3.4 Advice to the CHE

The contractor must provide appropriate advice on the short-term insurance portfolio in the event of the CHE requesting such advice, and assisting the CHE with the interpretation of the insurance policy documents and matters incidental thereto, including the interpretation of the insurance rules and regulations.

3.5 Obtain required insurance cover

3.5.1 The contractor will be required to advise and consult with the CHE on a renewal strategy, from time to time. The successful Bidder will need to obtain the required short-term insurance cover from the insurance industry based on the needs of the CHE, the prevailing market conditions at the

time and the insurance products that are available to mitigate or partly mitigate the risks as identified.

3.5.2 The contractor must continuously negotiate beneficial policy conditions for the CHE with the Insurer. The Service Provider must arrange for the issuing of the necessary policy contracts by the Insurer, on behalf of the CHE, when renewals are in effect, and when new cover is taken.

3.6 **Administer claims**

3.6.1 The contractor will be required to assist in the claims management process from submission to finalisation and reporting. Claims must be submitted to the insurer correctly and on time. All claims lodged with the insurers must be supported by all the relevant documentation to ensure efficient settlement. The contractor must ensure that the contractual rights of the CHE in terms of the insurance policy are protected and enforced.

3.6.2 The claims management process includes:

3.6.2.1 On-going management of all outstanding claims;

3.6.2.2 Receiving claims from the CHE and submitting these to the Insurer on a timely basis;

3.6.2.3 Following up with the insurer regarding the progress of claims;

3.6.2.4 Informing the CHE of outstanding documents on claims, if applicable;

3.6.2.5 Informing the CHE when payments are made;

3.6.2.6 Ensuring correct calculation and payment of benefits by an Insurer; and

3.6.2.7 Interacting with the Insurer where claims are repudiated.

3.7 **Claims logging and tracking**

The contractor must be able to provide a system to the CHE which will enable the CHE Risk Unit to log and submit claims, and to track the status of said claims.

4. **PERFORMANCE MEASURES**

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

5. BID EVALUATION

The proposals will be evaluated as follows:

5.1 Evaluation Stage One: Compliance

Compliance with administrative requirements stated in the Standard Bidding Documents and the mandatory requirements as listed in page 3. In this evaluation stage, all bidders that fail to provide the required information and documentation will be disqualified from further evaluation.

5.2 Evaluation Stage Two: Functionality evaluation criteria

In this evaluation stage, bidders are expected to obtain a minimum of **70** out of **100** points available to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed **70** points will automatically disqualify the bid offer from proceeding to the next evaluation stage. See **paragraph 6** below.

5.3 Evaluation Stage Three : Preference Point System

The **80/20** preference point system shall be applicable to this phase, where **80** points represent maximum obtainable points for the lowest acceptable price, and **20** points represents the B-BBEE level status. Points will be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table as listed in the bid documentation.

5.4 Evaluation Stage Four: Site Inspection

At the CHE's discretion a site inspection may be conducted at this stage. The CHE will visit the selected service providers' premises with the objective of verifying facts of the bidders as contained in their respective bid documents. Should it be discovered during a site inspection that the information submitted by the service provider is inconsistent with what is on their current premises of business, such bidders will be disqualified.

6. EVALUATION CRITERIA

The functionality criteria are listed below, and will be rated as follows:

Values: 1=Poor, 2=Average, 3=Good, 4=Very Good, 5=Excellent

Table 1

ITEM	DESCRIPTION	WEIGHT
1	CAPABILITY AS TO HOW THE BIDDER ENSURES THE BEST QUOTES	35
1.1	<p>Insurers and/or Underwriters</p> <p>The Bidder must describe how it will ensure the best quote/quotations for the CHE e.g. competitive premiums and minimal exclusions.</p>	15
1.2	<p>Knowledge sharing</p> <p>The Bidder must provide details of how it will ensure that the CHE stays up-to-date with developments in the market.</p>	5
1.3	<p>Additional capabilities and services offered</p> <p>The Bidder must provide details of the capabilities and tools that can provide additional value to the CHE. In this regard, the Bidder must clearly state whether the tools and capabilities listed would be separately charged if the CHE should elect to make use of them.</p>	15
2	REPORTING	10
2.1	<p>Compulsory Reporting:</p> <p>a. Quarterly Provide a sample of a monthly reconciliation report as described in paragraph 3.3.1 above (page 33).</p>	5
2.2	<p>b. Annual Provide a sample of a quarterly reconciliation report as described in paragraph 3.3.2 above (page 33).</p>	5
3	RISK MANAGEMENT (WHAT COVER WILL BE TAKEN)	30
3.1	<p>Determining the CHE Risk and Need</p> <p>The Bidder must outline the process of identifying and mitigating the risks that the CHE may be exposed to.</p>	20

ITEM	DESCRIPTION	WEIGHT
3.2	Transition Plan The Bidder must describe in detail the approach it will adopt in order to take over the existing Services from the current Services Provider.	10
4	ADMINISTRATION (CLAIMS LOGGING AND TRACKING)	15
4.1	The Bidder must describe: a. The interval system used in claims logging and tracking; and b. The system's capabilities and potential benefits to the CHE.	
5	BIDDERS PROFILE	10
5.1	The Bidder must describe: a. Details of permanent and experienced staff members who will be handling the CHE account. b. The availability of staff who will be handling the CHE's account. c. Its staff complement.	
Total		100

7. PREFERENCE POINT SYSTEM

The formula below will be used to calculate the preference procurement points for price:

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for comparative price of bid under consideration

P_t = Comparative price of bid or offer under consideration

P_{min} = Comparative price of lowest acceptable bid

Depending on the bidder's level of broad-based black empowerment contribution, a maximum of 20 points may be allocated to a bidder. The points scored by a bidder for broad-based black economic empowerment contribution will be added to the preference procurement points allocated for price.

The table below reflects the number of points to be allocated to a bidder based on broad-based black economic empowerment contribution:

Table 2

BBEE STATUS LEVEL OF THE BIDDER	NUMBER OF POINTS
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

B. ANNEXURE 1: DETAILED SCOPE OF WORK/SERVICES

The CHE carries a comprehensive insurance portfolio covering its operations. The insurance covers all CHE's assets, electronic equipment, business interruption, public liability, SASRIA, and personal accident cover for CHE Consultants, Council Members, and Committee Members.

A. Administration

The contractor will provide broker support services to the CHE to manage the CHE's short-term insurance portfolio, in particular the service provider must:

1. Advise and consult with the CHE on its short-term insurance portfolio renewal strategy, from time to time;
2. Obtain required short-term insurance cover for the CHE from the insurance industry based on the needs of the CHE, the current prevailing market conditions and the insurance products that are available to mitigate or partly mitigate the risks as identified and deliver the policy contracts within agreed timelines;
3. Assist in the claims process by ensuring that claims are submitted correctly and on time;
4. Liaise with the CHE and implement CHE instructions with regards to claims which have potential legal implications.
5. Ensure that all claims lodged with the insurers are supported by all the relevant documentation to ensure efficient settlement;
6. Ensure that the CHE's contractual rights are protected and enforced;
7. Act in the CHE's interest in all dealings with the appointed insurers and underwriters;
8. Ensure that the contractor's personnel appointed to work on the CHE account fully understand the contractor's obligations under the brokers' code of conduct and any other guidelines that may be issued by a regulatory body having jurisdiction over the service provider;
9. Render the following to the CHE on a quarterly basis:
 - 9.1 Reconciliation of all claims data;
 - 9.2 Quarterly monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register; and
 - 9.3 Performance report recording any failures to achieve service levels, the causes of the failures and a summary of steps taken to resolve the failures and avoid them in the future.
10. Annual reporting;
11. Timely invoicing of the CHE for premiums due for the insurance cover taken.

B. Communication to the CHE

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

1. Update the CHE on legal developments within the short-term insurance industry and inform the CHE on short-term insurance product developments and the risk mitigation developments in the South African market;
2. Provide appropriate advice on the short-term insurance portfolio, in the event the CHE requests such advice;
3. On-going evaluation of uninsured risks and possible options for addressing them;
4. Review the CHE short-term insurance portfolio with the CHE Risk Unit in a formalised pre-set meeting;
5. Assist the CHE with the interpretation of insurance policy documents and matters incidental thereto, including the interpretation of insurance rules and regulations.

C. Claims

The contractor will be responsible for management of claims and, for the sake of clarity, claims management needs include:

1. On-going management of all outstanding claims;
2. Receiving claims from the CHE and submitting these to the insurer on a timely basis;
3. Following up with the insurer regarding the progress of claims;
4. Informing the CHE of outstanding documents on claims, if applicable;
5. Informing the CHE when payments are made by insurers;
6. Ensuring correct calculation and payment of benefits by an insurer; and
7. Interacting with an insurer where claims are repudiated.
8. Closely liaise with the CHE with regards to claims which have potential legal implications.

D. Policy Documents

The contractor will be responsible for:

1. Arranging on behalf of the CHE for the timely issuing of the necessary policy contracts by an insurer; and
2. Continuously negotiating beneficial policy conditions for the CHE with an insurer.

E. Transition

The contractor must:

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

4. Part 4 –Evaluation criteria and process

No	Conditions	Confirmation			
		Yes	No	Noted	If no indicate deviation
1. EVALUATION PROCESS					
1.1 COMPLIANCE WITH MINIMUM REQUIREMENTS					
1.1.1	All bids duly lodged will be examined to determine compliance with bidding requirements and conditions. Bids with obvious deviations from the requirements/conditions, will be eliminated from further adjudication.				
1.2 PRICE FUNCTIONALITY AND PREFERENCE POINTS					
1.2.1	All remaining bids will be evaluated as follows :				
1.2.2	All bids will be evaluated for functionality up to the total of 100 points , thereafter and a further 80 points for price, and 20 points for BEE points will be awarded as set out in the preference points claim form(s)				
1.3 DETERMINATION OF PERCENTAGE FOR FUNCTIONALITY					
1.3.1	The evaluation criteria and weights for functionality as indicated in Table 1 (page 36), will apply.				
1.3.2	<p>The percentage scored for functionality should be calculated as follows:</p> <p>Each panel member shall award values for each individual criterion on a score sheet. The value scored for each criterion shall be multiplied with the specific weighting for the relevant criterion to obtain the marks scored for the various criteria. These marks should be added to obtain the total score. The following formula should then be used to convert the total score to a percentage for functionality:</p> $Ps = \frac{So}{Ms} \times Ap$ <p>Where:</p> <p>Ps = percentage scored for functionality by bid/proposal under consideration So = total score of bid/proposal under consideration Ms = maximum possible score Ap = Percentage allocated for functionality</p>				

No	Conditions	Confirmation			
		Yes	No	Noted	If no indicate deviation
	<p>The percentages of each panel member shall be added together and divided by the number of panel members to establish the average percentage obtained by each individual bidder for functionality</p> <p>After calculation of the percentage for functionality, the price of all bids that obtained the minimum score 70 points for functionality should be taken into consideration.</p>				
1.4 ELIMINATION OF PROPOSALS ON GROUNDS OF FUCTIONALITY					
1.4.1	Bids that score less than 70 points will be eliminated from further consideration. Points will therefore not be awarded for their cost proposals or for preference.				
1.5 DETERMINATION OF PERCENTAGE FOR PRICE					
1.5.1	<p>The percentage scored for price shall be calculated as follows:</p> <p>The lowest acceptable bid/proposal (adjusted or not), will obtain the maximum percentage allocated for prices (adjusted or not), will proportionately obtain lower percentages.</p>				
1.5.2	<p>The points scored out of 80 shall be calculated according to the formula.</p> <p>The 80/20 preference point system (below R1 000 000)</p> $P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$ <p>Where</p> <p>Ps= percentage scored for price by bid/proposal under consideration</p> <p>Pmin= lowest acceptable bid/proposal</p> <p>Hs= price of bid/proposal under consideration</p> <p>Rs= percentage scored for functionality and price by bid/proposal under consideration.</p>				

No	Conditions	Confirmation			
		Yes	No	Noted	If no indicate deviation
1.6 COMBINING PRICE AND B-BBEE STATUS PREFERENCE POINTS					
1.6.1	The B-BBEE preference points for each bid will now be added to the price(see 1.5.2)				
1.6.2	The Evaluation Committee may recommend that the contract be awarded to the bidder obtaining the highest aggregate mark as determined by 1.6.1 or to a lower scoring bid on justifiable grounds.				
1.7 ADJUDICATION OF BID					
1.7.1	The Evaluation Committee will consider the proposals and make the recommendations to the Procurement Committee. The successful bidder obtaining the highest aggregate mark as determined by 1.6.1 or to a lower scoring bid on justifiable grounds.				

5. PART 5: Curriculum Vitae-Template

CURRICULUM VITAE TEMPLATE (Attach at least three (3) CV's)

Proposed role in the project _____

1. Surname: _____

2. First name: _____

3. Nationality: _____

4. Education :

Institution (Date from – Date to)	Degree(s) or Diploma(s) obtained:

5. Language skills: Indicate competence on a scale of 1 to 5 (1 – excellent; 5 – basic)

Language	Reading	Speaking	Writing

6. Membership of Professional bodies: _____

7. Other skills: (Computer literacy etc.) _____

8. Present Position: _____

9. Years within the organisation: _____

10. Key qualifications: (Relevant to the project) _____

11. Relevant Experience :

Country	Date from – Date to

12. Professional experience:

Date from – Date to	Location	Company	Position	Description

Please provide more relevant information if space provided above is not sufficient.

CHECKLIST FOR COMPULSORY DOCUMENT TO BE ATTACHED TO THE TENDER DOCUMENT

NR	DOCUMENTS	TICKS
1	Company registration document	
2	B-BBEE Rating Certificate from an accredited rating agency/ accounting officer or a sworn affidavit	
3	Shareholder/members certified copied of ID	
4	Resolution (letter)	
5	Proof of registration as a financial service provider;	
6	Declaration and proof that pension or provident fund contribution are not in arrears	
7	Completed SBD Forms.	
8	In the event the company is bidding as a Joint Venture, all members of the JV must submit all required documentation (including venture agreement)	