



merSETA

MANUFACTURING, ENGINEERING AND RELATED SERVICES SETA

TERMS OF REFERENCE FOR TENDER

**PROVISION OF INSURANCE BROKER SERVICES FOR THE MANUFACTURING
ENGINEERING AND RELATED SERVICES SECTOR EDUCATION AUTHORITY**

DRAFT



merSETA

MANUFACTURING, ENGINEERING AND RELATED SERVICES SETA

CONTENTS

1. BACKGROUND.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed
2. SCOPE.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed
3. NOTES TO TENDERERS.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed
4. INFORMATION TO BE SUBMITTED.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed
5. EVALUATION CRITERIA.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed
6. ADDITIONAL INFORMATION.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed
7. GENERAL INFORMATION.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed
8. DISCLAIMER.....	Error! Bookmark not defined. Error! Bookmark not defined.	Field Code Changed

The objective of this Tender is to appoint a sound, professional and reputable service provider as short term insurance broker for the MERSETA for the period 01 April 2010 to 31 March 2011.



merSETA

MANUFACTURING, ENGINEERING AND RELATED SERVICES SETA

1. Background

The MERSETA is a Public Entity governed by applicable legislative frameworks. The organization is accountable to the Department of Higher Education and Training

The mandate of the MERSETA is to support and add value to the development agenda of government as indicated in the Skills Development Act.

The MERSETA has representation in all provinces and is organized on the basis of regional offices. The majority of the programmes undertaken by the MERSETA are managed from these offices. The properties from which they operate are leased.

A copy of the 2009 Annual Report, a copy of the Merseta Assets register as well two years claims history. Additional information about our structure and functional activities can also be obtained from the website www.Merseta.org.za

2. SCOPE

An Insurance Broking service is required to provide assurance to the MERSETA on all short term insurance aspects. A summary of the assets to be covered as well as the two years claim history is provided.

The selected contractor must be able to review the entire operations of the MERSETA and provide guidance on a broad range of insurance cover to the MERSETA. Proposals should set out how their services will assist the MERSETA in this area.

In this regard tenderers should at least provide for:

1. A broad range of expertise including, but not limited to, asset cover, public liability.
2. A quarterly insurance review
3. A reference list of clients stating size and nature of cover given
4. Details of the levels and types of cover available
5. Prepare cost comparisons based on data from insurance and underwriting companies
6. Information on the fee structure/management fee/commission – service and handling of claims
7. Access to a wide range of insurers and underwriters (list them)
8. Details of specialised services offered
9. Details of the handling of claims
10. Details of the value of cover currently handled for major clients – provide brief details of such clients.
11. An organogram of the staff member directly linked to the account, should your bid be successful.



merSETA

MANUFACTURING, ENGINEERING AND RELATED SERVICES SETA

4. NOTES TO TENDERERS

This section outlines basic requirements that must be met. Failure to accept these conditions or part thereof will result in your proposal being excluded from the evaluation process.

- This contract will be for an initial period of 12 months which may be extended by mutual consent or by tender. The contract may be cancelled by either party giving one months notice. Such notice shall be in writing and shall provide details for the cancellation.
- Short-listed firms might be invited to present and discuss details of their proposals.
- Tenderers will be required to fill in an MERSETA “Supplier Questionnaire” before their tenders are considered.
- Tender documents should be presented to the MERSETA marked “Tender for Insurance Broker Services – RFP no:
- The MERSETA will not be liable to reimburse any costs incurred by the tenderer during this tender process.
- The MERSETA is committed to maximize the value obtained from the available insurance broker resource. However the MERSETA does not bind itself to accept the lowest tender.
- Evaluation of tenders will be carried out by a Tender Evaluation Committee. The Evaluators will, if necessary, contact Tenderers to seek clarification of any aspect of the tender.
- Tenderers should identify any work they are currently carrying out or competing for which could cause a conflict of interest, and indicate how such a conflict would be avoided.

5. INFORMATION TO BE SUBMITTED

To facilitate the needs of the Tender Evaluation Committee in the evaluation process, all proposals must reflect the following information. Failure to supply all or any part of the requested information will result in a proposal being excluded from the evaluation process.

- Organisation chart for your firm. This should show all office locations. Identify the office that will be responsible for managing the contract. Also state which office shall be responsible for the administration of the contract, if different from above.
- Organisation chart for the office responsible for managing the contract.



merSETA

MANUFACTURING, ENGINEERING AND RELATED SERVICES SETA

- Company profile highlighting BEE status as far as shareholding and management is concerned.
- Details of previous experience of providing insurance broker services to the public sector. The MERSETA is seeking a provider that is fully familiar with the operating environment and regulatory issues faced by public entities.
- The MERSETA will require references from at least three of your current clients of which at least one should be from the public sector. Please provide the name of the client, his/her position, contact telephone numbers, description of work performed and dates of engagement.
- Details of the probable team that will be tasked with this assignment and should at least include:
 - Name of Employee;
 - Job Title;
 - Short CV reflecting professional qualifications, date that they joined your firm and current and previous work experience.
- Valid tax clearance certificate

6. Evaluation criteria

Tenderers will be assessed and scored according to the following criteria and weighting:

➤ PREFERENCE POINTS	Total =	10
➤ TECHNICAL	Total =	75
➤ PRICE	Total =	15

7. Additional information

Kindly email **Mr Bertram Baird** on bbaird@merseta.org.za if you require clarification of these terms of reference or further background related information. Any telephone requests will be disregarded.

Any requests for additional information will be collated by the MERSETA, Supply Chain Management Office and a composite response posted on our website www.merseta.org.za under the tender link..

All bids must remain valid for a period of ninety (90) days after the closing date. Late telegraphic, telefax and/or e-mailed bids will not be accepted.



merSETA

MANUFACTURING, ENGINEERING AND RELATED SERVICES SETA

8. GENERAL

- Potential Service Providers are required to submit their proposals on or before 12:00 on Any tender document received after closing date and time will not be considered.
- Tender documents should be deposited into the tender box of the MERSETA Head Office at:
 - Metropolitan Office Park
 - 8 Hillside Road
 - 3rd Floor
 - ParktownProposal received in any other way will not be considered.
- Two (2) bound hard copies AND one(1) unbound hard copy of the proposal must be submitted
- All correspondence to bidders will be in writing.

9. Disclaimer

MERSETA reserves the right not to appoint a provider for this tenders, Merseta further reserve a right to split this tender with more than one provider or award the portion of this tender to other providers.