



Knysna

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ADVERTISEMENT DATE:	06/05/2019
RFQ NUMBER:	B647/2018/19
DESCRIPTION OF GOODS/SERVICES:	Insurance Portfolio Management in a Municipal Environment. <i>The programme should be aligned to Unit Standard 242606</i>
RFQ DOCUMENTS ARE OBTAINABLE FROM:	Supply Chain Management Section Clyde Street Knysna or Knysna Municipality website: www.knysna.gov.za (Information centre>SCM>QUOTATIONS)
CLOSING DATE: TIME:	09/05/2019 12:00
SUBMISSIONS:	<p>Sealed quotations clearly marked, “Insurance Portfolio Management in a Municipal Environment. <i>The programme should be aligned to Unit Standard 242606</i>”, can be submitted:</p> <p>By hand to: Supply Chain Management Section Knysna Municipality Clyde Street Knysna</p> <p>By fax to: 086 650 1415 By email to: vnobatana@knysna.gov.za</p> <p>Contact person: Vuyolwethu Nobatana (Tel: 044 302 6595) Electronic bid documents must reach the Supply Chain Management Section before the closing time.</p>
COMPULSORY REQUIREMENTS:	A certified copy of the Bidders SETA accreditation Certificate must accompany the bid documents.
TECHNICAL ENQUIRIES:	Contact Person : Zukile Kala Email : zkala@knysna.gov.za Tell : 044 302 6462

The following conditions will apply:

- Price(s) quoted must be firm and must be inclusive of VAT when applicable.
- Tax Clearance Certificate or Sufficient Evidence that Tax matters are raised with SARS must be attached.
- Price must include all related expenses, i.e. transport, accommodation etc.
- Attached KMBD 4 document must be completed.
- Status of Municipal accounts must be submitted.
- Invoices must be submitted to jcordier@knysna.gov.za and will be paid within 30 days of delivering the service.
- Only an Official order and appointment letter will bind the Council.

REQUIREMENTS:

EVALUATION

Point's allocation for functionality

EVALUATION SCHEDULE

***** (Your pricing schedule will not be considered if proof relating to this table is not attached to this document)**

Criteria	Points	Bidder's score
Bidders experience in years in providing similar training to municipal officials and government departments – submit company profile to claim points	1-5 years: 5 points 6 + years: 10 points	
Bidders previous experience – submit contactable references of municipalities or government institution for whom <u>similar training</u> was rendered to	2 references – 3 3 references – 5 4 + references - 10	
Bidders experience and qualifications – submit CV's of facilitators that will provide training	Facilitator has relevant qualification and experience in either local, provincial or national government – 10 points Facilitator has relevant qualification but experience speaks to private sector – 5 points	
TOTAL	30 points	

Tenderers must achieve a minimum of 20 points in order to qualify for further evaluation on price and preference points.

Specification

INSURANCE PORTFOLIO MANAGEMENT

1. Background

Knysna Municipality wishes to enter into a contract with a suitably accredited service provider for the presentation of an accredited programme **in Insurance Portfolio Management in a Municipal Environment**. *The programme should be aligned to Unit Standard 242606*

2. Course outline

On completion of the course the learner should be able to:

- Apply knowledge of theories in investment portfolio management.
- Demonstrate insight into the products marketed by providers
- Demonstrate insight into portfolio management trends
- Explain the changing focus in marketing strategy in relation to the products and markets

3. Attendees

7 Budget Office Employees.

4. Duration

The training must be completed within 1.5 days

5. Language

Training must be presented in English.

6. Methodology

- Facilitation and Lectures
- Assignments
- Self-assessment exercises

7. SETA Certificate Accreditation

A certified copy of the Bidders SETA accreditation Certificate must accompany the bid documents. If the requested certified copy does not accompany the bid documents of the bidder, the municipality reserves the right to reject the bid.

8. Certification

Competency Certification on course completion.

9. Pricing

- A unit rate per trainee should be provided;

- The rate must be all inclusive (i.e. training material, stationery, all catering requirements, etc.);
- Rates must be VAT inclusive;
- The supplier must furnish the Municipality with an original detailed invoice.

10. Catering

The price of catering must include the following:

- Water and Sweets
 - Morning tea/coffee/Juice with a sandwich
 - Finger lunch with juice/coffee/tea
 - Afternoon tea/coffee/juice
- * consideration must be given to dietary requirements

11. Other

The successful bidder will be required to sign a Service Level Agreement with the Municipality.

PRICING SCHEDULE

ITEM	Quantity	Sub-total/unit rate per trainee
Training (Training material, stationery etc.) for 1.5 days	7 Delegates	
Catering		
	Price	
	Vat	
	Total(incl.)	

Contact Details of Tenderer

Knysna Municipality Supplier number	
CSD Supplier number	
CSD Unique Registration Reference Number	
The name of the Tenderer:	
The name of the contact person:	
The address of the Tenderer:	
Telephone:	
Facsimile:	
E-mail:	
Address (physical):	
Address (postal):	
Signature:	
Date:	

**MBD 4
DECLARATION OF INTEREST**

1.	No bid will be accepted from persons in the service of the state ¹ .		
2.	Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.		
3.	In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.		
3.1	Full Name of bidder or his or her representative:		
3.2	Identity Number:		
3.3	Position occupied in the Company (director, trustee, hareholder ²):		
3.4	Company Registration Number:		
3.5	Tax Reference Number:		
3.6	VAT Registration Number:		
3.7	The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.		
3.8	Are you presently in the service of the state?	YES	NO
3.8.1	If yes, furnish particulars: _____ _____		
3.9	Have you been in the service of the state for the past twelve months?	YES	NO
3.9.1	If yes, furnish particulars: _____ _____		
3.10	Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved the evaluation and or adjudication of this bid?	YES	NO
3.10.1	If yes, furnish particulars: _____ _____		
3.11	Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid	YES	NO
3.11.1	If yes, furnish particulars: _____ _____		
3.12	Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state?	YES	NO
3.12.1	If yes, furnish particulars: _____ _____		
3.13	Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state?	YES	NO
3.13.1	If yes, furnish particulars: _____ _____		

3.14	Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract	YES	NO
3.14.1	If yes, furnish particulars: <hr/> <hr/>		

¹MSCM Regulations: "in the service of the state" means to be –

- (a) a member of –
 - (i) any municipal council;
 - (ii) any provincial legislature; or
 - (iii) the national Assembly or the national Council of provinces;
- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of 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);
- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) An employee of Parliament or a provincial legislature.

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

4.	Full details of directors / trustees/ members / shareholders:		
	Full Name	Identity Number	State Employee Number

5. I, the undersigned (name) _____, certify that the information furnished in paragraphs 3 and 4 above is correct.

I accept that the state may act against me should this declaration prove to be false.

Name of Bidder		Date	
Signature		Capacity	

11. MDB 15 – Certificate for Payment of Municipal Services

NAME OF THE BIDDER: _____

FURTHER DETAILS OF THE BIDDER'S; Director / Shareholder / Partners, etc:

Director / Shareholder / partner	Physical address of the Business	Municipal Account number(s)	Physical residential address of the Director / shareholder / partner	Municipal Account number(s)

NB: Please attach certified copy (ies) of ID document(s)

I, _____,

(Full name in block letters) the undersigned, certify that the information furnished on this declaration form is correct and that I / we have no undisputed commitments for municipal services towards a municipality in respect of which payment is overdue for more than 90 days.

If the value of the transaction is expected to exceed R10 million (VAT included) I certify that the bidder has no undisputed commitments for municipal services towards a **Municipality** in respect of which payment is overdue for more than 30 days;

THUS DONE AND SIGNED for and on behalf of the Bidder, at _____, on the _____ day of _____, 20____.

Number of sheets appended by the tenderer to this schedule (If nil, enter NIL)	
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SIGNATURE:		NAME (PRINT):	
CAPACITY:		NAME OF FIRM:	

For office use (comments):