



**BID NOTICE AND INVITATION TO BID**

**BID NO: NLM/BTO/PIS/2023/2024**

**PROVISION OF INSURANCE SERVICES FOR 24 MONTHS.**

Ntabankulu Local Municipality is calling upon an experienced, competent, and qualified service provider that will provide Insurance Services for a period of Twenty-Four (24) months.

A detailed specification will be attached to the tender document.

Bid documents may be obtained from the Ntabankulu Local Municipality offices at ERF 85, Main Street, Ntabankulu, 5130, **during office hours 08H00 to 16H30 (Monday to Thursday), and 08H00 to 15H30 on Fridays.** Bid documents will be available immediately after the briefing session. A non-refundable cash payment of **R500.00** is required upon collection of the tender document.

EFT payments can also be made to the Municipality on the following details:

- **Account Name:** Ntabankulu Local Municipality
- **Cheque Account Number:** 62233334250 (First National Bank)
- **Branch Code:** 250035
- **Reference:** PIS & Company Name

A **compulsory briefing meeting/session** has been scheduled for **30<sup>th</sup> June 2023** at **11H00**, at **Ntabankulu Local Municipality main boardroom.**

Bids are to be completed in accordance with the conditions attached to the Bid document and must be sealed and endorsed with the relevant bid number and must be deposited in the official bid box clearly marked **"PROVISION OF INSURANCE SERVICES FOR 24 MONTHS, BID NO: NLM/BTO/PIS/2023/2024"** in the main entrance of the Ntabankulu Municipality at ERF 85, Main Street, Ntabankulu, 5130 not later than **12h00 on 12<sup>th</sup> of July 2023**, at which time bids will be opened in public. Bids shall be valid for a period of 90 days after the closing date of the submission of bids. **Under no circumstances will late tenders be accepted.**

Service providers are requested to attach the following mandatory documents for their bids on the pages indicated in the bid document:

- Valid SARS Tax compliance pin
  - MBD 3.1, 4, 6.1, 8 & 9 (Signed after the date of the Advert)
  - Proof of company registration
  - Original Certified ID copies for the entity owner/s
  - Valid original or certified copy of BBBEE Verification Certificate, or original sworn affidavit
- NB. All certification must not be more than 3 months old and must be in its original format.**

- Proof of municipal rates clearance for both the company and director/s of the company or a signed lease agreement by both parties and confirmation that there is no billing where the entity is based and/or Director
- A trust, consortium or joint venture must submit a consolidated B-BBEE status level verification certificate for every separate bid and a joint venture agreement.
- All prospective service providers are required to apply on Central Supplier Database in order to do business with all organs of the State in the Republic of South Africa at <https://secured.csd.gov.za>. Non-registration will be regarded as non-responsive and be disqualified from the bid.
- CSD should be attached.
- NB. Tender documents must be filled/completed in its original format; no copies will be accepted.

**Failure to submit the mandatory documents will deem the tender non-responsive and it will not be evaluated further.**

### Stage 1 Technical or Functionality Evaluation

Functionality will be evaluated based on capacity and experience and bidders who do not have a minimum functionally assessment of 70% will be considered non-responsive and not evaluated further.

Area of evaluation	Points allocated
Business entity establishment (Company profile with clear business address and contact details)	10 points
<p><b><u>Relevant entity experience in the industry:</u></b></p> <p>Appointment letters of similar projects implemented in the past.</p> <ul style="list-style-type: none"> <li>• Appointment letters from Five reputable entities = <b>20 points</b></li> <li>• Appointment letters from Four reputable entities = <b>10 points</b></li> <li>• Appointment letters from three reputable entities = <b>05 points</b></li> <li>• Two or less appointment letters reputable entities = <b>0 point</b></li> </ul>	20 points
<p><b><u>Methodology:</u></b></p> <ul style="list-style-type: none"> <li>• A detailed methodology including how the services will be conducted between the Municipality, broker and the underwriter. Please include details for excess payment on submitted claims. = <b>10 points</b></li> <li>• A clear description of the system to be used in claims logging and tracking including turnaround times for the processing of claims. = <b>10 points</b></li> <li>• The bidder must describe in detail an implementation plan and approach it will develop in order to take over the existing Services</li> </ul>	30 points

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from the Current service provider with detailed rollout after being awarded. = <b>10 points</b>	
<b>Capacity to undertake the job</b> Structure of Project Team with CV's and certified copies of certificates of key personnel (a minimum of two (2) dedicated members) = <b>10 Points</b> Less than two (2) dedicated members = <b>0 Points</b>	10 points
<b>Financial Capability</b> Previous years Audited Financial Statements Provide Audited financial statement from registered audit firm.	10 points
Certified copy of registration with relevant professional bodies, ie, Proof of registration with the following professional bodies: • Financial Services Board ( <b>FSB</b> ) License = <b>10 points</b> • Certified copy of the Financial Intermediaries Association of South Africa ( <b>FIA</b> ) Membership certificate. = <b>10 points</b>	20 points
	<b>100 points</b>

## Stage 2: Price and Specific Goals

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

*(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.*

*Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)*

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Business owned by =>50% black people		4		
Business owned by <50% black people OR		1		
Business owned by =>50% women		3		
Business owned by <50%		1		

women OR				
Business owned by =>50% Youth (age <= 35 years on the closing date)		5		
Business owned by <50% Youth (age >35 years on the closing date) OR		3		
Business owned by People with Disability / Military veteran		2		
Small Enterprise (SMME Category – QSE/EME		2		
Promoting Locality - Business located within Ntabankulu		4		
Promoting Locality - Business located in Alfred Nzo District OR		3		
Promoting Locality - Business located in Eastern Cape OR		2		
Promoting Locality - Business located in South Africa OR		1		

NTABANKULU LOCAL MUNICIPALITY reserves the right not to accept the lowest tender or any tender. Late, incomplete, telegraphic, or facsimile tenders will not be considered. The Council is not bound to accept the lowest or any proposal and reserves the right to accept the whole or part of the proposal any tender or to furnish reasons for its decisions.

Further enquiries should be directed to **Ms X.N. Venn** at **071 273 8746** or **vennx@ntabankulu.gov.za** or **Mr. O. Mdudi** at **mdudio@ntabankulu.gov.za** or **082 786 0772** during office hours i.e., between 08h00 and 16h30.

**Requested by**

**Recommended by**

**Approved by**



.....  
**N. Hlongwane**  
**Bid Specification Chairperson**



.....  
**X.N. Venn**  
**Chief Financial Officer**



.....  
**M. Pinyana**  
**Acting Municipal Manager**