Road Traffic
Management Corporation

APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF GROUP RISK BENEFITS TO THE RTMC FOR A PERIOD OF THREE YEARS, WITH AN OPTION TO EXTEND FOR A FURTHER PERIOD OF TWO YEARS

RTMC BID NO: 08/2026/27

Acronym	Meaning
Beneficiary Nomination Form	A formal document completed by an employee indicating the person(s) to receive benefits upon death.
Child	As defined in the BCEA, as amended, and the biological or adoptive child of such Employee or a child to which the Employee fulfil the role of a Parent as defined herein.
Claims Turnaround Time	The period between submission of a valid claim and payment by the service provider
Employee	Means any person employed as defined in the Labour Relations Act No 66 of 1995 (as amended), at the RTMC either permanently or on a fixed-term contract. Employee: in terms of the BCEA (see also LRA 66 of 1995) means Any person, excluding an independent contractor, who works for another person or the state and who receives, or is entitled to receive any remuneration; and any other person who assists in carrying on or conducting an employer's business. In terms of the RTMC, "employee" means a person employed by RTMC on an indefinite employment contract or fixed-term contract and is entitled to receive any remuneration from the RTMC. Therefore, it excludes a person employed using an employment broker.
Employee on Fixed-Term contract	refers to an employee appointed for a pre-determined period that may or may not be extended.
Estate Account	A legal account administered through the estate process where benefits are paid when no beneficiary is nominated.
Funeral Cover	A defined benefit paid to assist with funeral expenses for the employee and qualifying dependants.
Group Risk Benefit Scheme	is an essential group risk benefit, providing valuable financial peace of mind in the form of a life cover and funeral cover in the event of the death of an Employee and/or Traffic Trainee, Employee's and/or Traffic Trainee's spouse, and Employee's and/or Traffic Trainee's children, in line with the rules of the Scheme.
Life Cover	A lump sum benefit payable upon the death of the employee, whilst on duty (primary member).

Acronym	Meaning
RTMC	Road Traffic Management Corporation
Service Provider	The appointed insurer or intermediary responsible for underwriting, administering and paying claims.
Spouse	means the person with whom the Employee is joined in marriage or the common law wife or husband of the Employee or the Life Partner of the Employee.
Traffic Trainee	means any person enrolled in the traffic training programme provided by the Road Traffic Training Academy

SECTION: 1

CONDITIONS AND UNDERTAKINGS BY BIDDER

IN RESPECT OF THIS BID

CONDITIONS AND UNDERTAKINGS BY THE BIDDER IN RESPECT OF THIS BID

1. Proprietary Information

1.1 Road Traffic Management Corporation (RTMC) considers this bid and all related information, either written or verbal, provided to the Bidder to be proprietary of RTMC. It shall be kept confidential by the Bidder and its officers, employees, agents, and representatives. The Bidder shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of RTMC.

2. Enquiries

2.1 All communication and attempts to solicit information about this bid should be channelled to the email below. However, the cut-off date will be on **25 November 2026**.

Name	**RTMC**
Email Address	**Bidadmin@rtmc.co.za**

2.2 All the documentation submitted in response to this bid must be in English.

2.3 The RTMC reserves the right to provide clarifications to bidders only on matters relating to this bid. Such clarifications, where issued, will be shared in a manner that promotes fairness, transparency, and equal treatment of all bidders. Bidders remain responsible for submitting responsive bids based on the information contained in the bid documents and any official clarifications issued by the RTMC.

3. Validity Period

Responses to this bid received from bidders will be valid for **120 days,** counted from the closing date of the bid.

4. Supplier Performance Management

4.1 The RTMC views Supplier Performance Management as critical in ensuring value-for-money acquisition and good supplier relations between the RTMC and all its suppliers.

4.2 Upon receipt of written notification of an award, the successful Bidder shall be required to conclude SBD 7.2 and the Service Level Agreement (SLA) with the RTMC, which will form an integral part of the agreement. The SLA will be a tool to measure, monitor, and assess the

Bidder's performance level and ensure effective service delivery, quality, and value-add to RTMC business.

4.3 Should the successful Bidder fail to sign the SBD 7.2 and the SLA when called upon to do so, the RTMC may, without prejudice to any other rights it may have -

4.3.1 cancel the contract that may have been entered into between the successful Bidder and the RTMC, and the successful Bidder shall pay to the RTMC any additional expenses incurred by the RTMC having either:

4.3.1.1 to accept any less favourable Bid or,

4.3.1.2 if new Bids must be invited, the additional expenditure incurred by the invitation of fresh Bids and/ or by the subsequent acceptance of any less favourable Bidder.

5. Instructions on submission of Bids

5.1 Bids should be submitted as follows:

5.1.1 **Technical envelopes**

i. Two (2) copies for technical responses/functional evaluation (one original and one copy)
ii. PDF soft copy in a memory stick of the technical responses/functional (to be enclosed in the envelope that contains the original document)

5.1.2 **Financial envelopes**

i. The pricing schedule should be submitted separately. Two (2) copies (one original and one copy)
ii. PDF soft copy of a memory stick of the pricing schedule (to be enclosed in the envelope that contains the original document)

5.2 All envelopes to be sealed and endorsed, **RTMC BID 08/2026/27**: **Appointment of a service provider for provision of group risk benefits for the RTMC.**

5.3 The sealed envelope must be placed in the bid box at the Main Reception area of the **RTMC Centurion Gate Business Park Block D 146 Akkerboom Street Zwartkop Centurion, no later than 11:00am on 04 December 2026.**

5.4 **Compulsory Briefing Session: Registration**

The online/Virtual compulsory briefing session details are as follows:

5.4.1 Bidders must register for a compulsory briefing session by submitting the necessary information to bidadmin@rtmc.co.za by **17 November 2026 at 14:00pm** to be eligible to participate in the compulsory briefing and the bid process.

The following information is required to register for a briefing session:

- Company Name
- CSD Registration number
- Name and Surname of the Representative

5.4.2 Upon registration, a link will be shared with the bidders to enable them to participate in the stated virtual meeting.

5.4.3 Bidders will be required to log in using their company name thirty (30) minutes before the start of the briefing session to allow for virtual registration. For example, if the session starts at 10:00, bidders can log in at 09:30, and the session will begin promptly at 10:00 am.

5.4.4 After the briefing session, a signed briefing certificate will be emailed to all the bidders who were part of the online/virtual briefing session.

NB: The mentioned briefing certificate must be attached to the bid documents upon submission on the closing date of the bid. (Failing which will invalidate the bid)

5.5 **Compulsory Briefing Session: Online/Virtual**

5.5.1 The online/Virtual compulsory briefing session will be held on **19 November 2026 at 10:00am.**

5.6 The envelope must also endorse the Bidder's company name, closing date, and return address.

5.7 All bids submitted must be signed by a person or persons duly authorized thereto.

5.8 Suppose a courier service company is being used to deliver the bid document. In that case, the bid description must be endorsed on the delivery note/courier packaging to ensure that

documents are delivered into the bid box. The RTMC will not be held responsible for any delays where documents are not placed in the bid box before the closing date and time.

5.9 Bid received by email, facsimile, or similar medium will not be considered.

5.10 Where a bid document is not placed in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. **Late bids will not be considered**.

5.11 Amended bids may be sent in an envelope marked **"Amendment to Bid"** and should be placed in the bid box before the closing time.

5.12 Bidders should check the numbers of the pages to satisfy themselves that all are included and not duplicated. RTMC will accept no liability regarding anything arising from the fact that pages are missing or duplicated.

6. Undertakings by the Bidder

6.1 The Bidder accepts that all costs incurred in preparation, presentation, and any demonstration in relation to this bid shall be for the Bidder's account.

6.2 The Bidder hereby offers to render all or any of the services described in the attached documents to the RTMC on the terms and conditions and in accordance with the specifications stipulated in this bid documents (and which shall be taken as part of and incorporated into, this proposal at the prices inserted therein).

6.3 The Bidder shall prepare for a possible presentation should RTMC require such, and the Bidder shall be notified by 4 (four) days before the presentation date. Such presentation may include a demonstration of products or services as called for by the RTMC in relation to this bid.

6.4 The successful Bidder hereby accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.

6.5 Note that should the bid be accepted, and the Bidder be unwilling or unable to commence the services on the commencement date and / or during the execution of the contract due to circumstances that are within its control, the RTMC shall be entitled, without prejudice to any other rights it may have –

6.5.1 to terminate the contract or

6.5.2 claim specific performance from the successful bidder and

6.5.3 claim damages from the successful bidder.

6.6 The Bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response that the price (s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents and that the price (s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accepts that any mistakes regarding price (s) and calculations will be at his/her risk.

7. RTMC's Rights and Obligations

7.1 The RTMC reserves the right not to accept the lowest bid or any bid in part or whole. RTMC typically awards the contract to the Bidder, who proves to be fully capable of handling the contract and whose bid is technically acceptable and financially advantageous to RTMC.

7.2 The RTMC also reserves the right to award this bid as a whole or in part without furnishing reasons.

7.3 The RTMC reserves the right to conduct a site visit at the premises of the offices or any client sites if required.

7.4 The RTMC reserves a right to amend any bid conditions, validity period, or specifications or extend the closing date of the bid before the initially stated closing date. Bidders will be advised in writing of such amendments in good time.

7.5 The RTMC reserves the right to request all relevant information, agreements, and other documents to verify information supplied in the bid response. The Bidder hereby consents to the RTMC to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

7.6 RTMC reserves the right to verify authenticity of all the submitted documentation.

7.7 The flat rate for services and or products to be negotiated post appointment of bidder on the panel will apply to all bidders on the panel. RTMC specifically reserves the right to cancel the appointment of a bidder as part of the panel in circumstances wherein the bidder and the RTMC fails to negotiate and or agree on a flat rate for services and products. The RTMC may in these circumstances proceed to utilise bidders that did agree to a flat rate for services and products.

7.8 The RTMC acknowledges and agrees that all data and Personal Information provided by the Bidder to the RTMC, or to which the RTMC may be exposed, shall constitute Personal Information.

7.9 The RTMC hereby undertakes–

7.9.1 In favour of the Bidder that it shall at all times strictly comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) and any other legislation related to the protection of Personal Information.

7.9.2 To use its best efforts to keep Personal Information confidential and shall not disclose any Personal Information to any other person except as required by law, save to the extent set out in this bid.

7.9.3 At the RTMC's option, return or destroy any Personal Information once it is no longer required to perform its obligations under this bid or any directly related purpose and

7.9.4 not process Personal Information for any purpose other than to perform its obligations under this bid.

7.10 The RTMC reserves the right to reject a proposal for the award of a contract if the recommended bidder has committed a corrupt or fraudulent act in competing for the particular contract; or

7.10.1 Cancel a contract awarded to a supplier of goods or services –

i. if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract; or

ii. if any official or other role player committed any corrupt or fraudulent act during the bidding process or the execution of that contract that benefited that supplier.

7.11 The RTMC reserves the right to disregard the bid of any bidder if that bidder, or any of its directors –

(i) have abused the institution’s supply chain management system

(ii) have committed fraud or any other improper conduct in relation to such system; or

(iii) have failed to perform on any previous contract.

7.12 RTMC will inform the relevant treasury of any action taken in terms of paragraph (7.10).

7.13 **The RTMC will never request any compensation in whatever form; from any supplier to be awarded a contract. Suppliers are hereby advised not to fall for these scammers**.

8. SPECIAL INSTRUCTIONS TO BIDDERS

8.1 Bidders shall provide complete and accurate answers to the questions posed in this document.

8.2 Bidders must substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/technical requirements. All documents as indicated must be supplied as part of the bid response.

8.3 The RTMC reserves the right to sign a Service Level Agreement (SLA) with the service provider to supplement services in an agreement in this regard.

8.4 RTMC reserves the right to include any additional related items on the contract that are not part of the bid document.

8.5 The RTMC will not be held responsible for any costs incurred in the preparation and submission of bid documents

8.6 RTMC reserves the right to verify the information bidders provide; any misrepresentation will lead to the Bidder's disqualification.

8.7 To prevent the abuse of SCM system, RTMC will under no circumstances allow or promote bid rigging (or collusion bidding) from any bidder. For instance, bidders who submit bid documents on their own, and enter into Joint Venture Agreement or any other Agreement with another company using the same company, irrespective of either being declared on SBD 4 or not. Both bidders will be disqualified should such be identified.

8.8 RTMC reserves the right to determine the number of suppliers who will be appointed into a panel of service providers.

8.9 A panel of suppliers is deemed one bidder plus (1+). Should RTMC end with one (1) bidder who meets or is eligible for all the requirements, RTMC will re-advertise a supplementary bid to top-up the panel of bidders.

8.10 It is the responsibility of the bidder to formally inform or communicate with the RTMC on any administrative changes or amendments after their appointment into the panel which may have negative impact on execution of the contract, where necessary, the RTMC reserves the right to conduct due diligence.

8.11 Bidders are expected to ensure that all products (or goods) supplied must be South African Bureau of Standards (SABS) or South African National Standards (SANS) approved.

SECTION: 2

SPECIFICATION DETAILS AND FUNCTIONALITY REQUIREMENTS

SECTION 2: TECHNICAL REQUIREMENTS/ SPECIFICATIONS

1. PURPOSE

1.1 The purpose of this bid is to invite potential service providers for provision of group risk benefits to the RTMC for a period of three years, with an option to extend for a period of two years.

2. BACKGROUND AND DISCUSSION

2.1 RTMC offers life cover and funeral cover for employees, their spouse, and their children.

2.2 The Group Risk Benefit Scheme is aligned with the RTMC Bereavement Policy, particularly with respect to the defined funeral benefit amounts and categories of beneficiaries as outlined below:

Benefit	Cover Amount	Who is covered
Life Cover (death whilst on duty)	R350 000.00	Primary Member
Funeral Cover	R100 000.00	Primary Member
	R70 000.00	Primary Member's Spouse
	R30 000.00	Primary Member's child aged 14 to 21
	R25 000.00	Primary Member's child aged 6 to 13
	R10 000.00	Primary Member's child aged 2 to 5
	R 6 250	Primary Member's child aged 1 or under, including stillborn

2.3 The policy provides clear guidance on the structure of benefits payable for employees and their dependants, ensuring consistency, fairness and standardisation across the organisation. This alignment ensures that the scheme:

2.3.1 Supports organisational policy objectives;

2.3.2 Provides equitable benefits across employee groups; and

2.3.3 Strengthens governance and compliance in benefit administration.

2.4 To ensure that RTMC continues to derive value for money from the Group Risk Benefit Scheme, the following monitoring and evaluation measures are in place:

2.4.1 Track claims turnaround times (target: within 48 hours);

2.4.2 Monitor claims acceptance rate (target: 100% valid claims honoured); and

2.4.3 Hold quarterly meetings with the service provider to discuss performance and new developments.

2.5 RTMC seeks to create a benefit unique to the RTMC employees as part of the improvement of the HR value proposition. Employee Benefits remain an integral part of the retention of talent. The benefits of having Group Risk Benefits for the RTMC employees are:

2.5.1 Retention - Acts as a valuable employee benefit that aids in retaining talent.

2.5.2 Financial Security - Provides essential protection for employees and their families during unexpected, life-altering events.

2.6 It is against this background that the RTMC would like to advertise the bid to appoint an experienced and reputable service provider to provide a comprehensive Group Risk Benefit.

3. DETAILED SPECIFICATION AND SCOPE OF WORK

3.1 The RTMC is committed to providing adequate benefits to employees in times of need. Therefore, there is a need to provide group risk benefits which will then form part of an enhanced employee benefit package. These benefits are an important component of the total offering when attracting and retaining employees.

3.2 The risk benefits provide financial protection to employees and their dependants in the event of death or a long-term illness, while still in employment of the RTMC. Risk events such as death can be a costly exercise with a number of complexities and uncertainties, unless effectively managed.

3.3 The RTMC currently employs approximately one thousand five hundred and ninety-nine employees (1599) employees. There are also approximately five hundred and forty-one (541) traffic trainees enrolled on traffic trainee programme. Therefore, there are approximately two thousand, one hundred and forty-one (2140) members to be covered.

3.4 The RTMC hereby requests experienced and reputable bidders to submit proposals for the provision of the Group Risk Benefits for RTMC employees. The risk benefits should include the following:

3.4.1 Group Life Cover (Death whilst on duty)

3.4.2 Family Funeral Benefit /Death Benefit

3.5 The Group Risk Benefits should comprise of the following:

Benefit	Cover Amount	Who is covered
Life Cover (death whilst on duty)	R350 000.00	Primary Member
Funeral Cover	R100 000.00	Primary Member
	R70 000.00	Primary Member's Spouse
	R30 000.00	Primary Member's child aged 14 to 21
	R25 000.00	Primary Member's child aged 6 to 13
	R10 000.00	Primary Member's child aged 2 to 5
	R 6 250	Primary Member's child aged 1 or under, including stillborn

3.6 The service provider needs to provide a comprehensive employee benefits team to facilitate the following:

3.6.1 Claims assessment and processing;

3.6.2 Payment facilitation;

3.6.3 Group Risk Benefit Member Education and awareness;

3.6.4 Comprehensive Reporting; and

3.6.5 Data Monitoring.

3.7 **Burial Repatriation**

In the event that an employee dies on duty, the group life cover must include transportation of the deceased by road or air to the final funeral home. The anticipated financial implications should remain the same (there **must not** be any additional costs to the Corporation on repatriation services).

3.8 The bidder must outline deliverables in terms of the following:

3.8.1 Support

3.8.2 Reporting

3.8.3 Innovation, additions and/or other improvements and options regarding the scheme.

SECTION: 3

EVALUATION CRITERIA

1. EVALUATION CRITERIA

The bid will be evaluated in the following stages:

1.1 Stage 1 – Standard Compliance Requirements

Bidders are expected to submit and comply with all the Standard Compliance Requirements. Failure to comply with these requirements will lead to bidders being disqualified from evaluation. Below are the Standard Mandatory requirements

(i) Bidders are required to submit bid documents as follows:

- one original,
- one hard copy
- PDF soft copy in a clearly marked/ labelled memory stick. Documents submitted on soft copy must be the same documents as the hard copy (original).

(ii) In case of a Joint Venture (JV), Consortium, Teaming Agreement, or similar relationship/agreement, bidders must submit standard bidding documents i.e.

- SBD 1, one consolidated SBD 1 for Joint Venture (JV), Consortium, Teaming Agreement, or similar relationship/agreement signed by the authorized person(s). (e.g Company resolution, or an affidavit or declaration or a letter of authorisation).
- SBD 4 for each entity/company in the JV or any teaming agreement, must be enclosed on envelope one only.
- **SBD 6.1 must be enclosed on envelope one only**
- For each of the entities in an agreed business relationship accompanied by a signed agreement by all the parties concerned.

- All returnable tender documents must be signed by a **duly authorised person**. Where the signatory is not a director, proof of authorisation or delegation must be submitted (e.g. Company resolution, or an affidavit or declaration or a letter of authorisation). In the case of a sole director, proof of directorship (such as Company Registration Certificate {CIPC/ CK}) will suffice.
- The layout of the required documents is set up in table 1.1
- ***NB:*** *To prevent the abuse of the SCM system, RTMC will under no circumstances allow or promote bid rigging (or collusion bidding) from any bidder. For instance, bidders who submit bid documents on their own, and enter into a Joint Venture Agreement or any other Agreement*

with another company using the same company, irrespective of either declared on SBD 4 or not. Both bidders will be disqualified should such be identified.

- Bidder(s) must be registered with National Treasury Centralised Supplier Database (CSD) – CSD report or CSD MAAA Reference Number.
- Compulsory briefing session certificate must be completed and enclosed on envelope one.

1.2 Stage 2 – Mandatory Requirements

Bidders who fail to meet the mandatory requirements will be disqualified from further evaluation.

1.3 Stage 3 - Functionality Evaluation

This process will be on written responses/ proposals which consists of **hundred (100) points**.

NB: Bidders will be required to score a minimum of **70 points** in order to qualify for a stage 4.

1.4 Stage 4 – Price and Specific Goals Evaluation

Bidders will be evaluated on 80/20 Preference Point System (i.e., 80 points for price and 20 points for specific goals).

2. STAGE 1 – STANDARD COMPLIANCE REQUIREMENTS

STANDARD COMPLIANCE REQUIREMENTS	COMPLY (YES / NO)
ENVELOPE ONE (1)	
Total number of copies submitted – Two (2) (1 original and one copy) All the documentation under the bid proposal is to be converted and submitted in a PDF within a memory stick	
Proof of CSD Registration. (CSD number or report) Registration on CSD (available on www.csd.gov.za)	
Compulsory Briefing Session Certificate	
SBD 1: Invitation to bid and company information	
SBD 4: Declaration of interest	
SBD 6.1: Preference points claim form	
NB: All returnable tender documents must be signed by a duly authorised person. Where the signatory is not a director, proof of authorisation or delegation must be submitted (e.g. Company resolution, or an affidavit or declaration or a letter of authorisation). In the case of a sole director, proof of directorship (such as Company Registration Certificate {CIPC/ CK}) will suffice.	
ENVELOPE TWO (2) – FINANCIAL PROPOSAL	
Total number of copies submitted – **(Two (2) one original and one copy)** All the documentation under the financial proposal is to be converted and submitted into a PDF within a memory stick	
Pricing Schedule (Annexure) **NB. Bidders are required to complete the attached provided Pricing schedule – (either as issued or on the company letterhead)**	

2.1 STAGE 2 – MANDATORY REQUIREMENTS ACCORDING TO LICENCING CATEGORY

NOTE: A BIDDER WHO FAILS TO MEET THE BELOW MANDATORY REQUIREMENTS WILL BE DISQUALIFIED FROM FURTHER EVALUATION

The mandatory requirements for insurers and brokers differ; for insurers, please complete Table1 and for brokers, complete Table 2.

Table 1	**INSURERS (UNDERWRITER)**	
ITEM	**DESCRIPTION**	**COMPLY (YES / NO)**
1.	**Prudential Authority** Bidder must be licensed in terms of the Insurance Act **Compliance requirement**: A valid certificate of licensing issued by the Prudential Authority must be provided for evaluation.	
2.	**Financial Sector Conduct Authority (FSCA)** Bidder must be licensed as a Financial Services provider in terms of the Financial Advisory and Intermediary Services Act (FAISA). **Compliance requirement**: A valid certificate of registration with FSCA must be provided for evaluation.	

Table 2	INSURANCE BROKERS	
ITEM	**DESCRIPTION**	**COMPLY (YES / NO)**
1.	**Financial Sector Conduct Authority (FSCA)** Bidder must be licensed as a Financial Service provider in terms of the Financial Advisory and Intermediary Services Act (FAISA). **Compliance requirement**: A valid certificate of registration with FSCA must be provided for evaluation.	
2.	**Professional Indemnity Cover** The bidder is required to have professional indemnity insurance cover. **Compliance requirement**: The bidder must attach proof of professional indemnity insurance cover with a minimum cover of **R5 million.**	

NB: Only bidders who qualify for stage 4 (Price and Specific Goals); their certificates of membership and/or qualification registrations will be verified by the Bid Evaluation Committee.

Failure to comply with the above requirements will lead to a disqualification of the bid.

3. STAGE 3 - FUNCTIONALITY CRITERIA

This stage will be based on written proposals and shall be evaluated on the following parameters for functionality:

DESCRIPTION	POINTS
A. REFERENCES OF SIMILAR WORK DONE	**20**
The bidder must provide details of similar insurance work done which will reflect experience in the financial service industry: • 5 - 10 reference letters = **15 points** • 11 reference letters and more = **20 points** **Compliance requirement:** Bidders are expected to attach copies of reference letters from Organisations/entities where similar services are currently and previously rendered. The following details must at least be reflected in the content of the reference letter/s: - • Name and short description of similar service rendered, • Addresses where the services are rendered, • Period of service, • Value of insurance cover, • Contactable References. (Letter of references in letterhead of the clients signed by authorized persons. Signature date on the reference letter must be from 2018 to date/ onwards), **supported by attaching a copy of the purchase order/ proof of appointment/ a copy of Service Level Agreement (SLA) or contract to the reference letter.** **NB:** Bidders are required to complete the attached template to reflect similar work done. The above details must be fully completed as provided on the attached template. **Bidders MUST ensure that information provided is accurate and correct as the RTMC reserves the right to conduct reference checks.**	

DESCRIPTION	POINTS
B. QUALIFICATIONS, SKILLS & EXPERIENCE OF THE KEY PROFESSIONAL TEAM	**40**
The bidder's proposed personnel must have relevant insurance skills, qualifications, and minimum experience in line with Financial Sector Conduct Authority (FSCA) requirements. Bidder must provide abridged CVs and relevant qualification(s) for the following team members: **Team Leader/Account Manager** = **20 Points** Experience = 15 Points The Team Leader/Account Manager must have at least five (5) years of experience as a team leader/accounts manager within the Financial Services Sector. 10 years and above = 15 Points 8 – 9 years = 10 Points 5 – 7 years = 5 Points **Compliance Requirement** CV indicating clearly the number of years as a Team Leader/Accounts Manager within the insurance industry. Where a Team Leader/Accounts Manager has been with various organisations, the CV must clearly indicate the organisation's and related period for each organisation to enable the Corporation to calculate the number of years accurately. E.g. ✓ Name of Organisation ✓ Period 01 January 2021 to 31 December 2025 (Total Years – 5yrs) ✓ Name of Organisation ✓ Period 01 January 2021 to 30 June 2025 (Total Years – 4 yrs 6 months) Qualification = 5 Points The team leader must be in possession of relevant qualifications and an industry-specific certification for financial services providers and compliance officers as detailed in Board Notice 51 of 2017 (Government Gazette no 40785 of 13 April 2017). Kindly see the link below for more information.	

DESCRIPTION	POINTS
https://www.masthead.co.za/wp-content/uploads/2017/05/20170413_Board-Notice-51-of-2017_-Amendments-to-FAIS-Recognised-Qualific....pdf **Compliance Requirement** The bidder must attach a copy of a relevant Diploma or Degree Certificate. Only NQF Level 6 and above will be accepted. **Client Liaison Officer** = **20 Points** Experience (15) The Client Liaison Officer must have at least three (3) years of experience as a Client Liaison Officer within the Financial Services Sector. 8 years and above = 15 Points 4– 7 years = 10 Points 0 – 3 years = 5 Points **Compliance Requirement** CV indicating clearly the number of years as a Client Liaison Officer within the insurance industry. Where a Client Liaison Officer has been with various organisations, the CV must clearly indicate the organisation's and related period for each organisation to enable the Corporation to calculate the number of years accurately. E.g. ✓ Name of Organisation ✓ Period 01 January 2021 to 31 December 2025 (Total Years – 5yrs) ✓ Name of Organisation ✓ Period 01 January 2021 to 30 June 2025 (Total Years – 4 yrs 6 months) Qualification (5) The Client Liaison Officer must be in possession of any qualification RE5 = 5 Points **Compliance Requirement** The bidder must attach a copy of an RE5 certificate.	

DESCRIPTION	POINTS
C. TECHNICAL CAPACITY AND METHODOLOGY WORK PLAN	**40**
1. The bidder must provide a detailed approach (roadmap/diagram/structured, etc.) outlining the processes in terms of claims settlements/turn-around times in relation to the following: - The above should address the following variables: = 2**0 points** • Allocation of roles and responsibilities, (4) • sample forms to be completed, (4) • method of submission (manually or electronically), (4) • claim checklist, (4) • dedicated call centre agents supporting RTMC) (4) 2. Evidence of an installed electronic self-service system and helpdesk facility that provides accurate and up to date information on the administration of the scheme (sample/printout) = **5 Points** 3. Evidence of document management system that complies with a record management system, POPI, and any other policies or procedures that apply to the nature of confidential information that arises from this service (attach internal policy and/or SOPs) = **5 Points** 4. Provide claims and escalation policy/ procedures that complies with 48hr turnaround time = **5 Points** 5. Monthly reporting and monthly engagements (attach sample report) = **5 Points** • Number of claims; • Type of claim; • ID No./Employee Number • Value of benefit • Status of the claim	
TOTAL POINTS	**100**

NB: BIDDERS ARE EXPECTED TO SCORE MINIMUM OF SEVENTY (70) POINTS IN ORDER TO QUALIFY FOR STAGE 4.

4. STAGE 4 – PRICE AND SPECIFIC GOAL EVALUATION

CRITERIA	MAXIMUM POINTS
Price	80
Black Owned Company	4
Women Owned Company	5
Youth Owned Company	5
*Company owned by people living with disabilities	6
Grand Total	**100**

*** Letter from a medical practitioner confirming disability must be submitted when these points are claimed.**

SECTION: 4

ANNEXURE AND STANDARD BIDDING DOCUMENTS

See the attached SBD forms.

(All SBD forms must be signed)

BIDDING DOCUMENTS: GENERAL INFORMATION

1. The bidding forms are drawn up so that certain essential information is to be furnished in a specific manner. Any additional shall be provided in the enclosed questionnaire(s) or a separate annexure.

2. The bidding forms should not be retyped or redrafted; photocopies may be prepared and used. Additional offers may be made for any item, but only on a page photocopy. Additional offers made in any other manner may be disregarded.

3. Bidding forms not filled in using a computer and printer shall be completed in black ink.

4. Bidders shall check the numbers of the pages and satisfy themselves that all are included and not duplicated. No liability shall be accepted regarding claims arising from the fact that pages are missing or duplicated.

5. If attached, the forms regarding the Preference Points Claim shall be completed and submitted with the completed bid.

6. Firm bid prices and delivery periods are preferred. Consequently, bidders shall clearly state whether prices and delivery periods will remain firm for the duration of the contract.

7. If non-firm prices are submitted, the bidding documents should clearly state this.

8. Where items are specified in detail, the specifications from an integral part of the bidding document and bidders shall indicate in the space provided whether the items offered are to specification.

9. Regarding the paragraphs where the items offered are strict to specification, bidders shall insert the words "as specified."

10. In cases where the items are not to specification, the deviations from the specifications shall be indicated.

11. Pricing will be negotiated to a flat / standard rate once the panel has been put in place to the appointed service providers.

12. All prices shall be quoted in South African currency.