 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

REQUEST FOR PROPOSAL – HR 01/2024

MEDICAL AID BROKER SERVICES

1. Background

The Durban ICC is among the most advanced conferencing facilities in the world, having been voted Africa’s Leading Convention Centre by the World Travel Awards for more than 17 years. The centre is graded 5-star by the South African Tourism Grading Council.

2. Purpose

The Durban ICC requires the services of a medical aid broker, for a period of 12 months.

3. Mandatory Requirements

Does the service provider comply with the minimum requirements? Please acknowledge as illustrated	Yes	No
	✓	X
<ul style="list-style-type: none"> All brokers are required by law to hold an accreditation from the council of Medical Schemes (CMS) and a license from the Financial Services Board (FSB). The service provider is required to attach proof thereof in the bid submission. 		
<ul style="list-style-type: none"> The Broker should have at least three years’ experience in the industry. The service provider is required to attach a company profile together with a reference letter. 		

Please Note: Failure to meet all of the stipulated mandatory requirements will result in the service provider being deemed non-responsive and will not be considered for state two of the evaluation. The bidder must complete the final column above stating whether they can complete the task or not.

NB: Durban ICC agrees that they will comply with Protection of Personal Information (POPI) Act regulations and process all the information and/or personal data in respect of the services being rendered in accordance with the said regulation and only for the purpose of providing the Services set out in the agreement to provide services.

4. Three Stage evaluation process

STAGE 1: Mandatory Requirements


- (a) Bid submissions will be evaluated based on compliance with mandatory requirements detailed in **clause 3 above**.

STAGE 2: Functionality Criteria

The number of evaluation points for **functionality is 100**.


(a) Functionality Evaluation

- The service provider is required to submit a detailed proposal outlining the services and value adding benefits associated with the medical aid brokerage services.


 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

2. The service / benefits offered will be weighed against each proposal received to ascertain which proposal provides the best value and is in line with the best interests of the Durban ICC.
3. The evaluation will be undertaken by minimum three (3) independent officials of the Durban ICC.
4. The various services for consideration are outlined in the functionality elements.
5. There should be no charge to the Durban ICC for the services to be provided.
6. The following criteria and formula will be used to calculate points for the Functionality:
7. A minimum quality criteria score of 70 must be obtained in order for the bidder to be deemed responsive.
8. A bidder, who does not meet the minimum quality criteria score of 70, will be deemed non-responsive and not further evaluated.

Evaluation criteria and supporting documents	Average weight	Points	Points Allocation
<p>Medical Aid Brokerage experience in providing medical aid brokerage services</p> <p>The bidder must submit a proposal clearly indicating their knowledge of the industry, applicable legislation and how they have contributed to the industry.</p>	10	4	<p>4 points= proposal clearly indicating knowledge of the industry of at least ten years or more, applicable legislation and how they have contributed to the industry.</p> <p>3 points= proposal indicating knowledge of industry 7-9 years, applicable legislation and how they have contributed to the industry.</p> <p>2 points= proposal briefly indicating knowledge of industry 4-6 years, applicable legislation and how they have contributed to the industry.</p> <p>1 point= proposal does not indicate knowledge of industry up to 1-3 three years, applicable legislation and how they have contributed to the industry.</p>
<p>References</p> <p>Medical Aid Brokerage demonstrated expertise in negotiating medical aid benefits on behalf of clients of similar size as the Durban ICC. Indication of number of corporate clients.</p>	10	4	<p>4 points= five or more reference letters indicating work with and negotiating medical aid benefits on behalf of clients.</p> <p>3 points= three reference letters indicating number of work with and negotiating medical aid benefits on behalf of clients.</p> <p>2 points= two reference letters indicating number of work with and negotiating medical aid benefits on behalf of clients.</p> <p>1 point= less than two reference letters indicating work with and negotiating medical aid benefits on behalf of clients</p>

 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System		Approval	
			Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template		Doc No: SR-277	
			Issue Date: 08/12/2023	Rev: 1

<p>Infrastructure</p> <p>Details of information technology system which the Medical Aid Brokerage use to provide the above services; Contact Centre; Medical Aid Brokerage Website; Electronic tools for communication.</p>	10	4	<p>4 points= system which the Medical Aid Brokerage use to provide services consists of all three systems mentioned under infrastructure and other systems</p> <p>3 points= system which the Medical Aid Brokerage use to provide services consists of all three systems mentioned under infrastructure.</p> <p>2 points= system which the Medical Aid Brokerage use to provide services consists of only two systems mentioned under infrastructure.</p> <p>1 point= system which the Medical Aid Brokerage use to provide services consists of only one system mentioned under infrastructure.</p>
<p>Reporting</p> <p>The bidder must provide samples of reports that cover the required scope and provide details of their additional value-add offering.</p>	30	4	<p>4 points= bidder provided samples of reports (quarterly reports) that covers MORE than the factors included in the required scope and details of their additional value-add offering.</p> <p>3 points= bidder provided samples of reports (quarterly reports) that covers the required scope and details of their value-add offering.</p> <p>2 points= bidder provided samples of reports (quarterly reports) that covers less than the required scope and details of their value-add offering.</p> <p>1 point= bidder did not provide samples of reports (quarterly reports) and details of their value-add offering.</p>
<p>Methodology and approach</p> <p>The bidder must provide ideas, strategic initiatives and innovative approach on how the account will be managed. The approach must clearly indicate how the bidder will deliver to the required scope. The approach must also include how the bidder will integrate with</p>	40	4	<p>4 points= methodology and approach of the bidder exceeds expectations and clearly indicates how the bidder will deliver to the required scope.</p> <p>3 points= methodology and approach of the bidder clearly indicates how the bidder will deliver to the required scope.</p>

 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

Durban ICC's Employee Wellness Programme.			<p>2 points= methodology and approach of the bidder moderately indicates how the bidder will deliver to the required scope.</p> <p>1 point= methodology and approach of the bidder does not indicate how the bidder will deliver to the required scope.</p>
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STAGE 3: Price and Preference

Due to the nature of the bid being an RFP, this bid will not be evaluated on Price and Preference as the bidders are NOT required to submit a price quotation. Evaluation for this RFP will solely be based on the above mentioned evaluation criteria instead of the PPPFA. Thus the 80/20 principle will not be applicable.

5. Scope of Supply /Services

- 5.1. Broker should communicate any new developments pertaining to medical aid scheme to the Durban ICC and its members within 14 days from the date of approval by the medical aid.
- 5.2. Further communicate any changes or trends or changes annually to members and provide advice on implementation thereof.
- 5.3. Updates on various aspects / improvements of the healthcare industry on a monthly basis.
- 5.4. Intelligent plan selection and on-going product training.
- 5.5. Member needs analysis and education.
- 5.6. Annual health day / wellness day.
- 5.7. Management and resolution of billing queries, including relevant procedures for in house administration of medical aid.
- 5.8. Year-end impact and wellness reports.
- 5.9. Advisory and information services such as posters, SMS notifications, newsletters and staff surveys.
- 5.10. Gap cover.
- 5.11. Provision of a resource portal.
- 5.12. Onsite presence (Monthly).

6. Specifications


Not applicable

7. Drawings if Applicable

Not applicable

8. Pricing Schedule (Official Offer Form)

Not applicable

 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

9. Preconditions

A written proposal/quotation will not be considered unless the service provider who submits the quotation provides the following with their proposal/quotation:

- 9.1 Full name
- 9.2 Identification or company or other registration number
- 9.3 Tax reference number and VAT number, if any
- 9.4 Valid original Tax clearance pin from South African Revenue Services which proves that the service provider's tax matters are in order
- 9.5 Valid BBBEE Certificate
- 9.6 MBD 4 Declaration of Interest form must be completed
- 9.7 MBD 6.1 Preference points claim must be completed
- 9.8 The service provider must be registered on the CSD database and EThekwini Vendor Portal. Proof of registration needs to be submitted. Failure to be registered on these databases will adversely affect the awarding process and may result in the service provider being deemed non-responsive.

CSD registration website: <https://secure.csd.gov.za>

EThekwini Vendor Portal registration: <https://ethekwivendor.durban.gov.za>

Or contact 031 322 7011 / 7154

Fatima.milazi@durban.gov.za / phumla.mdabe@durban.gov.za

10. Terms and Conditions


- 10.1 The service provider will hereby propose to perform and complete all work required in this RFP. It will be deemed that they have checked all aspects of this work before submitting a proposal.
- 10.2 The Durban ICC is entitled to cancel the Request for Proposal (RFP) at any time before the issue of the award. The Durban ICC shall, in no way, be liable for any damages whatsoever, including, without limitation, damages for loss of profit, in any way connected with the cancellation of this Request for Proposal (RFP).

11. Protection of Personal Information

- 11.1 By responding to this Request for proposal you hereby consent to the Durban ICC processing your personal information as defined in the Protection of Personal Information Act 4 of 2013 ("POPIA").
- 11.2 The Durban ICC shall take reasonable steps in terms of POPIA to protect the personal information supplied as part of this Request for proposal.

12. Contact Person

Cathy Munsamy: Payroll / HR Administrator
Tel: 031 360 1276
Email: Cathyn@icc.co.za

 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

13. Closing Date

Quotations/proposals, together with this document, marked for the attention of the Procurement Department and are to be placed in the Tender Box at the Durban ICC security entrance on the ground floor, 45 Bram Fischer Road Durban before **12:00 on 31st January 2024.**

14. Past experience in similar assignments

Assignment Description	Key Elements	Date Completed	Contact Person and Telephone Number	Assignment Value

I.....being duly authorized thereto by..... do hereby confirm that the information contained herein is true and correct and acknowledge that, should it be established that any of the information contained herein is false and incorrect, my company may be disqualified from quoting to the Durban ICC.

Name: *(Block Capitals)* _____

Signature: _____

Date: _

15. Declaration of Municipals Fees

I, the undersigned, do hereby declare that the Municipal fees of


.....
(Full name of Company / Close Corporation / partnership / sole proprietary/Joint Venture)

(hereinafter referred to as the TENDERER) are, as at the date hereunder, fully paid or an Acknowledgement of Debt has been concluded with the Municipality to pay the said charges in instalments.

The following account details relate to property of the said TENDERER:

Account

Account Number: to be completed by tenderer.

 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	<p align="center">ISO Management System</p>	<p align="center">Approval</p>	
		<p align="center">Chief Financial Officer</p>	
	<p align="center">Request for Proposal (RFP) Advertisement Template</p>	<p>Doc No: SR-277</p>	
		<p>Issue Date: 08/12/2023</p>	<p>Rev: 1</p>

Consolidated Account No.	<input type="text"/>
Electricity	<input type="text"/>
Water	<input type="text"/>
Rates	<input type="text"/>
Other	<input type="text"/>
Other	<input type="text"/>

I acknowledge that should the aforesaid Municipal charges fall into arrears, the Municipality may take such remedial action as is required, including termination of any contract, and any payments due to the service provider by the Municipality shall be first set off against such arrears.

- Where the TENDERER'S place of business or business interests are outside the jurisdiction of eThekweni Municipality, a copy of the accounts/agreements from the relevant municipality must be attached (to the back inside cover of this document).
- Where the tenderer's Municipal Accounts are part of their lease agreement, then a copy of the agreement, or official letter to that effect is to be attached (to the back inside cover of this document).

NAME (Block Capitals)
SIGNATURE : DATE:

(of person authorised to sign on behalf of the Tenderer)

16. MBD4 Declaration of Interest


16.1 No bid will be accepted from persons in the service of the state¹.

16.2 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.

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

16.3.1 Full name of bidder or his/her representative

16.3.2 Identity number:

 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

16.3.3 Position occupied in the Company (director, trustee, shareholder²):

.....

16.4.4 Company Registration Number:

16.4.5 Tax Reference Number:

16.4.6 VAT Registration Number:

16.4.7 The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

References:

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

- (a) a member of –
 - any municipal council
 - any provincial legislature
 - 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;
- (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.

16.4.8 Are you presently in the service of the state?
If yes, furnish particulars:


YES	NO
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16.4.9 Have you been in the service of the state for the past twelve months? If yes, furnish particulars:

YES	NO
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16.4.10 Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and/or adjudication of this bid?
If yes, furnish particulars:

YES	NO


 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

16.4.11 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? If yes, furnish particulars: 	YES	NO

16.4.12 Are any of the company's directors, trustees, managers, principal shareholders or stakeholders in service of the state? If yes, furnish particulars: 	YES	NO

16.4.13 Is any spouse, child or parent of the company's directors, trustees, managers, principal shareholders or stakeholders in service of the state? If yes, furnish particulars: 	YES	NO

16.3.14 Do you or any of the directors, trustees, managers, principal shareholders or stakeholders of this company have any interest in any other company or business whether or not they are bidding for this contract? If yes, furnish particulars: 	YES	NO

 <p>DURBAN ICC INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
	Request for Proposal (RFP) Advertisement Template	Doc No: SR-277	
		Issue Date: 08/12/2023	Rev: 1

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

Full Name	Identity Number	State Employee No.

Signature

Date

Capacity

Name of Bidder