



TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR INSURANCE SERVICES FOR THE SOUTH AFRICAN LIBRARY (SALB) FOR THE BLIND (SALB) FOR 36 MONTHS

1. INTRODUCTION

The South African Library for the Blind renders a library and information service to blind and print-handicapped readers through the production of accessible South African reading material in development of a comprehensive library collection and rendering of advisory services to promote access to information.

2. PURPOSE

The objective of the project is to ensure that all SALB's assets are insured against exposure to risks.

3. SCOPE OF WORK

The service provider must provide insurance underwriter premiums based on the schedule of SALB's insurance portfolio. The insurance needs to cover all the assets of SALB as per the fixed assets register and the amount to be insured for assets is expected to be derived from the annual asset valuations performed.

The service provider will be expected to address the following risk areas and provide reliable information on the following:

a. Office contents

- Furniture and Fittings, IT equipment and Intangible Assets (Software's)

b. Business All Risk.

- As per SALB's Asset Register e.g. laptops

c. Theft

- Damage to contents, at any building as a result of theft accompanied by forcible entry into or exit from the building

d. Electronic equipment

- Physical loss or damage to property belonging to SALB.

e. Motor Vehicles

- Comprehensive cover for damage / loss of motor vehicles.
- Excess Waiver must be included
- Third party liability

- f. **Glass**
 - Internal and External Glass (including mirrors)
- g. **SASRIA**
 - Riot and strike, and political riot
- h. **Fidelity Guarantee**
 - Cover against commercial crime / fraud caused by hackers or SALB employees
- i. **Combined Risk**
 - Cover against all property constructed of brick, stone, concrete or metal on metal framework and roofed with slate, tiles, metal, concrete.
- j. **Insured Risks (Combined):**
 - Fire, lightning, thunderbolts, subterranean fire, explosions, implosions, spontaneous combustion, fermentation, charring, smoke, storm, wind, water, hail or snow, earthquake, earth tremors, aircraft, impact, theft and accidental damage due to sanitary ware
- k. **Cyber liability**
 - A cover against attack/hacking and compromising SALB's existing systems such as finance and Procurement system.
 - A cover that enabling recovery of information due to theft/hacking of SALB's systems.
- l. **Support**
 - One-on-one dedicated Claims Consultant
- m. **Claims**
 - 30 calendar days turn-around time for outcome of claim from the date of submission of the claim
- n. **Fixed Asset Values:**

Description	Carrying Amount
Furniture and Fittings	R 110 000
Motor Vehicles	R 373 000
Office Equipment	R35 000
IT Equipment	R 2 306 000
Software	R 108 000
Inventory	R 5 027 000

A detailed fixed asset register will be shared with the winning service provider

4. REQUIREMENTS

- a. The service provider must submit CV's and qualifications of the team to be allocated to SALB
- b. The company must have at least a minimum experience of 3 years as insurance broker.
- c. The service provider must provide details of their Financial Advisory and Intermediary Services Act (FAIS Act) compliance, i.e. copy of FAIS Certificate must be submitted with the proposal.

5. PERIOD OF WORK

The contract will be for a period of 36 months

6. SUBMISSION OF DOCUMENTS

Service providers must submit the following documents:

- a. A detailed written proposal indicating the project plan, the team members to be allocated to SALB and their qualifications and relevant experience.
- b. Provide and attach a copy of the service provider's unique personal identification number (PIN) issued by SARS
- c. Service providers must also submit the recent CSD Report.
- d. Provide and attach a copy of a valid BBBEE Certificate from an Accredited Verification Agency or a Letter from SANAS and for the Exempted Micro Enterprises (EMEs), EME sworn affidavit.
- e. All Service providers must be members of the Financial Intermediaries Association (FIA). Proof of membership must be submitted with the proposal.
- f. SBD forms must be completed in full and signed
- g. Submission of contactable references in company letterhead, for similar projects completed.

7. PROPOSAL SUBMISSION AND ENQUIRIES

- a. Service providers should send their completed proposals and accompanying relevant documentation by email to SCM unit by **14 February 2025 at 12H00.**
Email : noncedo.brukwe@salb.org.za
- b. Note that no late proposals will be considered.

8. SELECTION AND EVALUATION CRITERIA

a. Functionality Criteria

The evaluation criteria to be utilized will be the following:

5= Excellent, 4 = Good, 3 = Satisfactory, 2 = Poor, 1= Unacceptable

The below matrix will be used in scoring the proposals: Description of Quality Criteria and Sub-criteria	Scoring	Weight
Total Functionality	Total Score	100%
A. Methodology in managing this project which should:		
Provide a detailed approach including how you will conduct service between the Client, Broker and the Insurance party.		35%
5. Excellent understanding of what is required in the terms of reference; an innovative and practical approach to developing an application; proposed action plan including milestones and timeframes; and a project monitoring and evaluation mechanism to ensure that the main	5 = Excellent	
4. Good understanding of what is required in terms of reference; practical approach and methodology; proposed action plan including milestones and timeframes; and a project monitoring and evaluation mechanism to ensure that the two main deliverables Are integrated and contemporary.	4 = Good	
3. Satisfactory (or repeat of ToRs) understanding of what is required in terms of reference; generic or text book approach and methodology; proposed action plan including milestones and timeframes; and a project monitoring and evaluation mechanism to ensure that the two main deliverables are integrated and complementary	3 =Satisfactory	
2. Poor understanding (wrong interpretation) of what is required in terms of reference and missing one of the of the following critical components: approach and methodology; action plan; and project monitoring and evaluation mechanism	2= Poor	
1. No action plan submitted.	1=Not Acceptable	
B. Relevant Company experience		
To evaluate each of the above components, the following criteria will apply:		35%
6 years and above of relevant experience = Excellent	5 = Excellent	
4 to 5 years' relevant experience = Good	4 = Good	
3 years' relevant experience = Satisfactory	3 =Satisfactory	
2 years' experience = Poor	2= Poor	
0 -1 year experience = Not Acceptable	1=Not Acceptable	

C. Similar Projects Completed (Attach reference letters)		
Number of Completed Similar Projects:		30%
5 or More Completed Similar Projects = Excellent	5 = Excellent	
4 Completed Similar Projects = Good	4 = Good	
3 Completed Similar Projects = Satisfactory	3 = Satisfactory	
2 Completed Similar Projects = Poor	2 = Poor	
1 Completed Similar Projects = Acceptable	1 = Not Acceptable	

Service providers must attain a minimum score of 70 in the functionality evaluation, in order to be evaluated Price and specific goals.

b. B-BBEE Evaluation /Scoring

As this procurement is expected not to exceed a maximum of R50 million, the 80/20 preferential procurement measure is applicable. In order to achieve specific goals, a maximum of 20 points will be awarded to a tenderer for broad-based black economic empowerment as follows:

- B-BBEE status Level 1 contributor: 20 points
- B-BBEE status Level 2 contributor: 16 points
- B-BBEE status Level 3 contributor: 10 points
- B-BBEE status Level 4 contributor: 8 points
- B-BBEE status Level 5 contributor: 6 points
- B-BBEE status Level 6 – 8 contributor: 0 points

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